SL Travel Booking Manager

A complete dive-trip booking system for WooCommerce

Version 1.1.0 | WordPress Plugin User Manual

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Contents

1. Overview & Installation

SL Travel Booking Manager adds a dedicated **Trip** product type to WooCommerce, purpose-built for dive operators and similar travel businesses. It covers the whole booking lifecycle: adding a trip to the cart, collecting a deposit, tracking installment payments, gathering traveler information, digital waiver signing, and generating the final trip manifest.

- **Trip Products** — a custom product type with departure dates, capacity limits, and per-trip payment settings
- **Traveler Forms** — secure, token-authenticated forms collecting passport, flight, and dive certification details
- **Payment Plans** — a configurable deposit at checkout with installment schedules and automatic reminder emails
- **Waivers** — send, track, and bulk-download signed digital liability waivers, via either Smartwaiver or the free SL Waivers & Leases plugin (Section 14)
- **Travel Overview** — a central admin dashboard with per-traveler status, quick payment recording, and bulk exports
- **Manifests** — generate and print traveler manifests directly from the WordPress admin

Component	Minimum	Notes
WordPress	5.8	–
WooCommerce	5.0	Tested up to 8.0
PHP	7.4	PHP 8.x compatible
MySQL	5.6	MariaDB 10.1+ also supported
SSL Certificate	Required	Needed for secure traveler-form token links

Installation

1. Go to **Plugins → Add New → Upload Plugin**, choose `streamline-wc-travel-trips.zip`, click **Install Now**, then **Activate Plugin**.
2. A new **Travel Trips** menu appears in the WordPress admin sidebar.

Step 1 — General Settings

Go to **Travel Trips → Settings** and configure: default deposit percentage (applied at checkout unless overridden per trip), a check mailing address (shown for check/wire payers), email notification addresses, and the traveler form page (create this page first — see Step 2).

Step 2 — Create Required Pages

Page	Shortcode	Required?
Traveler Form	`[trip_traveler_form]`	Required
Customer Payment Portal	`[trip_customer_portal]`	Recommended
Payment Schedule	`[trip_payment_schedule]`	Optional

> **Note:** after creating the Traveler Form page, return to Settings and select it from the Traveler Form Page dropdown, so the plugin knows where to send travelers.

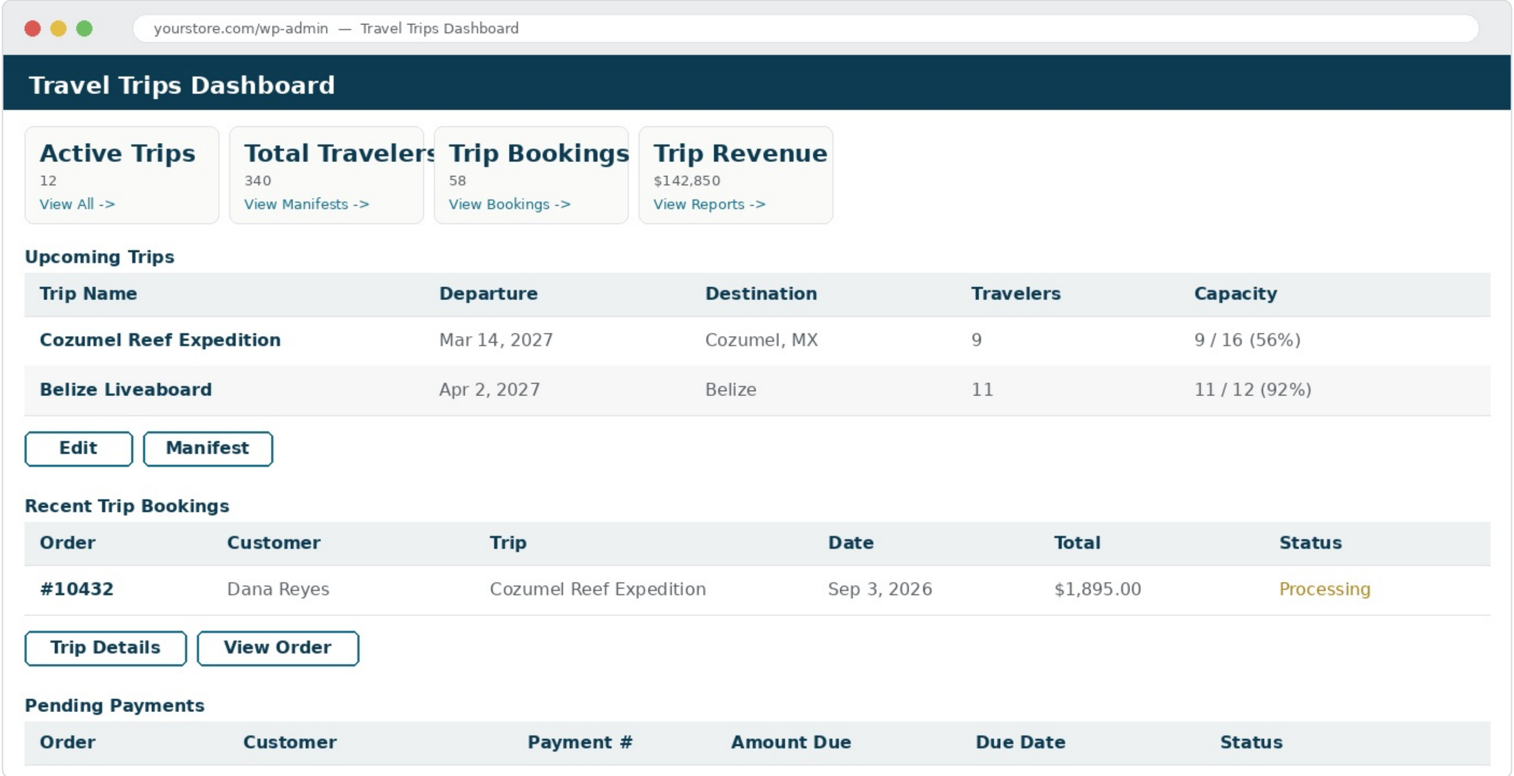
Step 3 — Terms & Conditions

Go to **Settings → Travel Form Terms & Conditions** and write your terms or upload a PDF. Travelers must accept them before submitting their form (see Section 6).

Step 4 — Choose a Waiver Provider (Optional)

Go to **Settings → Waiver Integration** and choose a **Waiver Provider**: **Smartwaiver** (a separate paid service with its own account and API key) or **SL Waivers & Leases** (the free waiver plugin already installed on this same site, with nothing external to set up). See Section 12 for the full comparison and setup steps for each.

2. Dashboard



Travel Trips Dashboard — stat cards, Upcoming Trips, Recent Bookings, and Pending Payments.

Go to **Travel Trips → Dashboard** — this is what loads by default when you click the plugin's main menu item, and it's the best place to see the state of your whole travel program at a glance.

Statistics Cards

Four cards run across the top, each linking straight to the relevant screen:

Card	Counts	Links to
Active Trips	Every non-archived trip product	All Trips
Total Travelers	Everyone booked across every active trip	Manifests
Trip Bookings	Every original booking order (not counting separate installment payment orders)	Bookings (Section 10)
Trip Revenue	Total revenue across all trip bookings	Reports

Upcoming Trips

The next 5 trips departing from today onward, soonest first, with: Trip Name, Departure date, Destination, current Travelers count, and Capacity — shown as "current / max (percent)" and color-coded green under 70% full, orange from 70–89%, red at 90% or more. Each row has **Edit** (opens the trip product) and **Manifest** (jumps straight to that trip's manifest — Section 11).

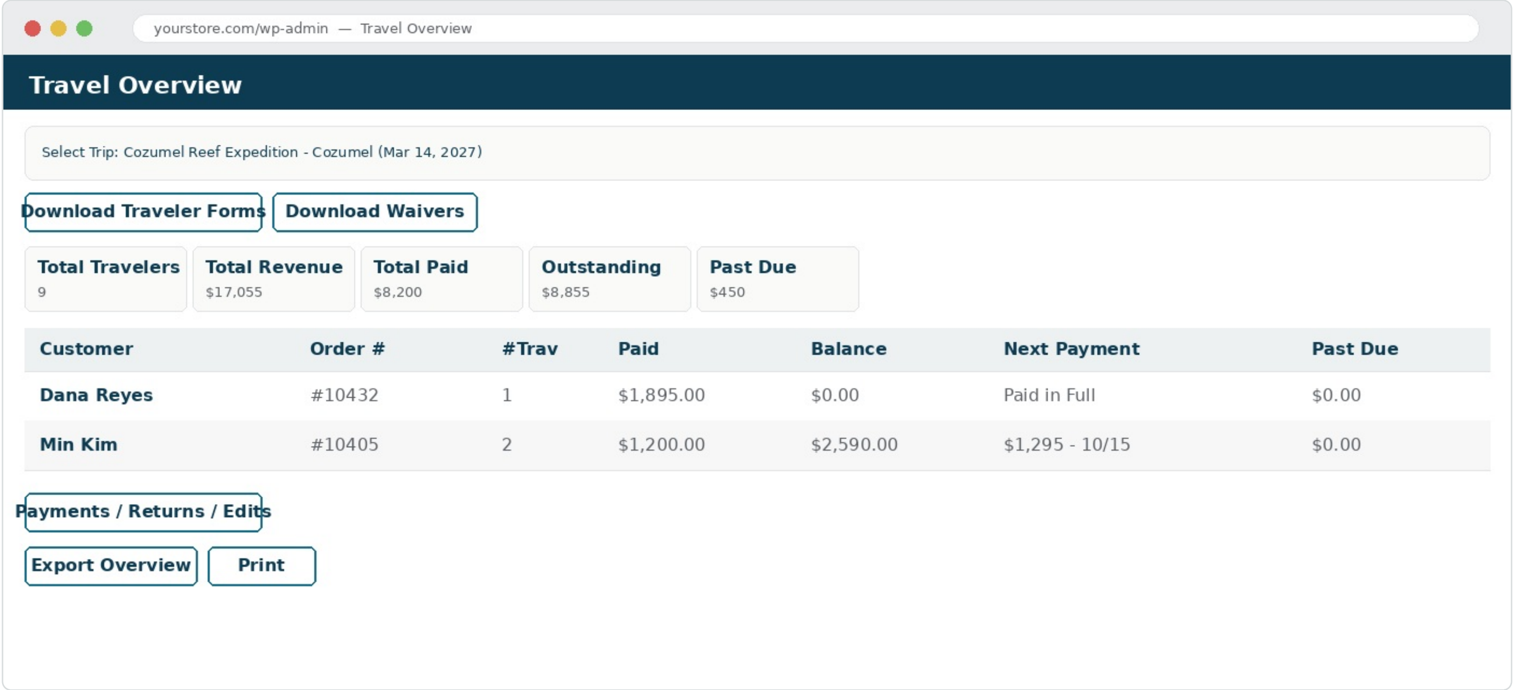
Recent Trip Bookings

The most recent original booking orders (10 per page, with pagination controls below the table), showing Order, Customer, Trip, Date, Total, and Status. Each row has **Trip Details** (opens the customer-facing trip details page in a new tab) and **View Order** (the standard WooCommerce order editor) — the same two actions available on the full Bookings list (Section 10).

Pending Payments

Every order with an unpaid installment that's either already overdue or due within the next 90 days (fully paid orders don't appear here at all), sorted with overdue payments first, then soonest-due next. Columns: Order, Customer, Payment # (or "Overdue" if that installment is past due), Amount Due, Due Date, and a color-coded Status — red for overdue (with the number of days), amber for due within 7 days, blue for due within 30 days, gray beyond that. Each row has **View Schedule** (a quick read-only popup of that order's full payment schedule) and **View Order**.

3. Travel Overview



Travel Overview — every column and button, for one selected trip.

Go to **Travel Trips → Travel Overview** — the primary day-to-day management screen for one trip's bookings at a time.

Step 1: Select a Trip

Choose a trip from the **Select Trip** dropdown — each option shows the trip name, destination, and departure date so trips are easy to tell apart. The page reloads with that trip's summary and full booking table.

Step 2: Bulk Download Buttons

- **Download Traveler Forms** — downloads every completed traveler form for this trip in one action
- **Download Waivers** — downloads every signed waiver for this trip in one action, from whichever provider is active (Section 12)

> **Pop-ups required:** both of these open several documents at once — allow pop-ups for your WordPress admin domain, or only the first document will appear.

Step 3: The Summary Cards

Card	Shows
Total Travelers	Everyone booked on this trip
Total Revenue	The trip's full booked value
Total Paid	How much has actually been collected so far
Outstanding Balance	What's still owed across every booking (amber if greater than $0, green at $0)
Past Due	The portion of the outstanding balance that's already overdue (red if greater than $0, green at $0)

Step 4: The Booking Table

One row per order, with an expand arrow on the left — click it to reveal every traveler on that order underneath, along with each one's individual waiver and traveler-form completion status.

Column	What it shows
Customer Name	The name on the booking
Order #	Linked to the WooCommerce order
# Travelers	How many people this order covers
Total Paid	Amount actually collected on this order so far

Balance Owed	What's left (red if greater than $0, green at $0)
Next Payment	The amount and due date of the next unpaid installment, or "Paid in Full." If the order is still Pending and its very first installment hasn't been marked paid yet, a green **Mark as Received** button appears here for a one-click deposit confirmation.
Past Due	Any portion of this order's balance that's already overdue (red if greater than $0, green at $0)
Payments / Returns / Edits	Opens a dedicated per-order screen for recording additional payments, processing full or partial refunds, cancelling the reservation, and editing traveler/add-on details — see Section 9 below
Save	Only appears for older bookings still using manual waiver checkboxes instead of a configured waiver template — saves those checkbox states. Bookings using a modern waiver template (Smartwaiver or SL Waivers & Leases) show no button here at all, since there's nothing manual left to save.

Step 5: Export and Print

At the very bottom: **↑ Jump to Top of Page** (for a long booking list), **Export Overview** (downloads this trip's whole booking table), and **Print** (a print-friendly version of the same view).

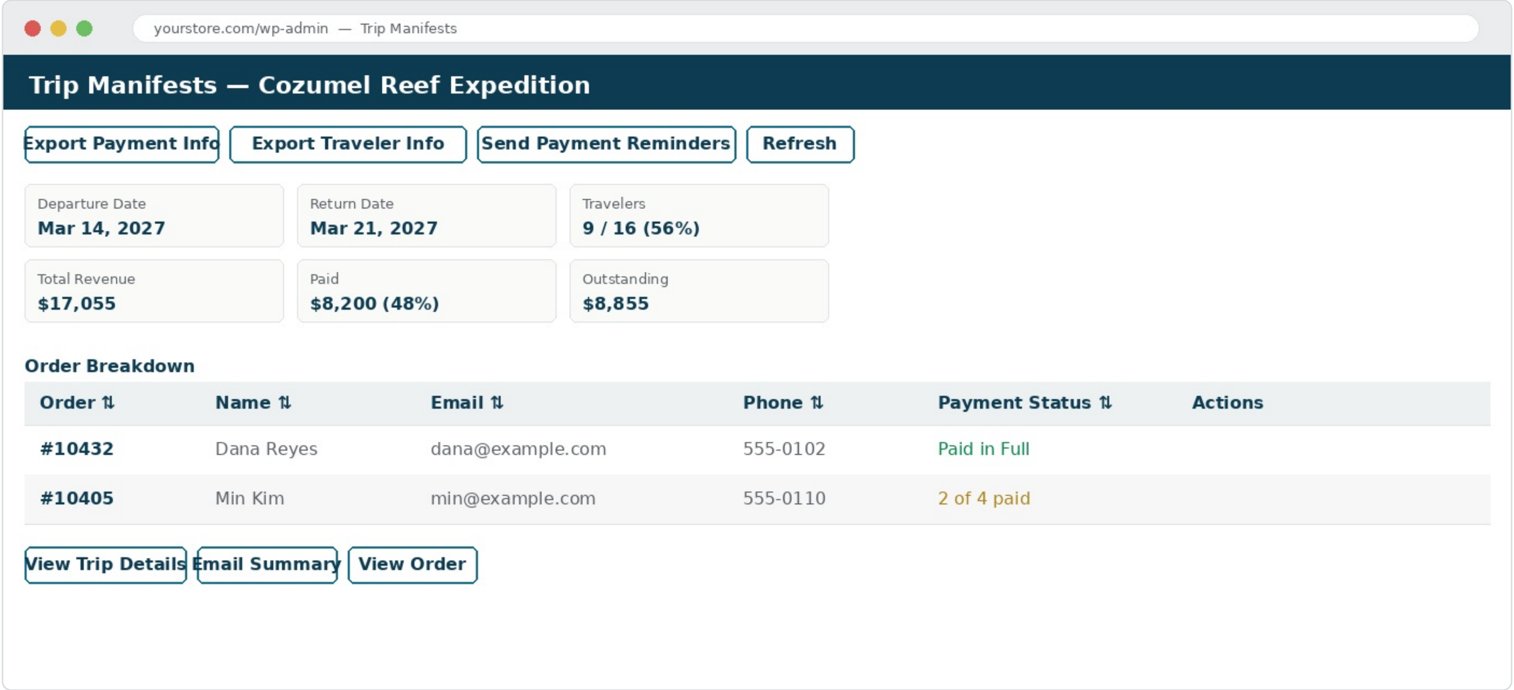
3a. Payments, Returns & Edits (Per-Order Detail Screen)

This is the screen opened by the **Payments / Returns / Edits** button in the booking table above — a dedicated workspace for one order at a time, covering everything you can't do from the summary row itself.

- **Record an additional payment** against the order, outside the normal scheduled installments
- **Manage traveler add-ons** — add, remove, or adjust add-ons for individual travelers on this booking, with totals recalculating automatically
- **Process a refund** using the built-in refund calculator: it starts from the total already paid, lets you set a **Non-Refundable Amount** to deduct (for a cancellation fee, for example), and computes the actual **Refund Amount** live as you adjust it. A **Full Refund** shortcut fills in the entire paid amount at once.
- **Cancel and Refund Reservation** — cancels the booking outright and processes the calculated refund together as one action, with a confirmation summary before anything is finalized
- **Recalculate the order total** — if travelers or add-ons changed after the original booking, this brings the order's total and payment schedule back in line, flagging an overpayment/refund-due situation if the new total comes out lower than what's already been paid
- **Generate a travel itinerary** — produces a printable itinerary combining customer information, trip details, and the booking's specifics

This is order-specific: everything here applies to the one order you arrived from — for correcting a payment schedule that's gone wrong across the board, or in bulk, see Fix Payment Schedules (Section 16) instead.

4. Manifests



Trip Manifests — bulk actions, trip-level stats, and a sortable order breakdown.

Go to **Travel Trips → Manifests** and select a trip. This is the operational, day-of view for a specific departure — who's booked, how they've paid, and quick ways to reach every traveler at once.

Step 1: Bulk Actions

- **Export Payment Info** — downloads a spreadsheet of every booking's payment status for this trip
- **Export Traveler Information** — downloads the traveler details collected for this trip (contact info, and whatever else your Traveler Form collects — Section 5)
- **Send Payment Reminders to All** — emails every traveler with a pending payment on this trip in one action, rather than reminding each one individually
- **Refresh** — this page caches its data for performance; click Refresh to pull the latest numbers immediately rather than waiting for the cache to expire on its own

Step 2: The Trip Stats

Stat	Shows
Departure Date / Return Date	This trip's dates
Travelers	Current count / max capacity, with a percentage — turns red once you're at 90% or more of capacity
Total Revenue	This trip's full booked value
Paid	Amount collected so far, with the percentage of revenue that represents
Outstanding	What's still owed, plus how many separate payment plans are currently active if more than zero
Overdue Payments	Only shown at all if there's at least one — a count of overdue installments, flagged as needing action

Step 3: The Order Breakdown Table

Columns: **Order, Name, Email, Phone, Payment Status, Actions**. Click any column header except Actions to sort by that column — click again to reverse the sort order. (Sorting is only available while the table has no expanded payment-schedule rows showing beneath it, and is automatically disabled if the trip has an unusually large number of bookings.)

Each row's **Actions** column has:

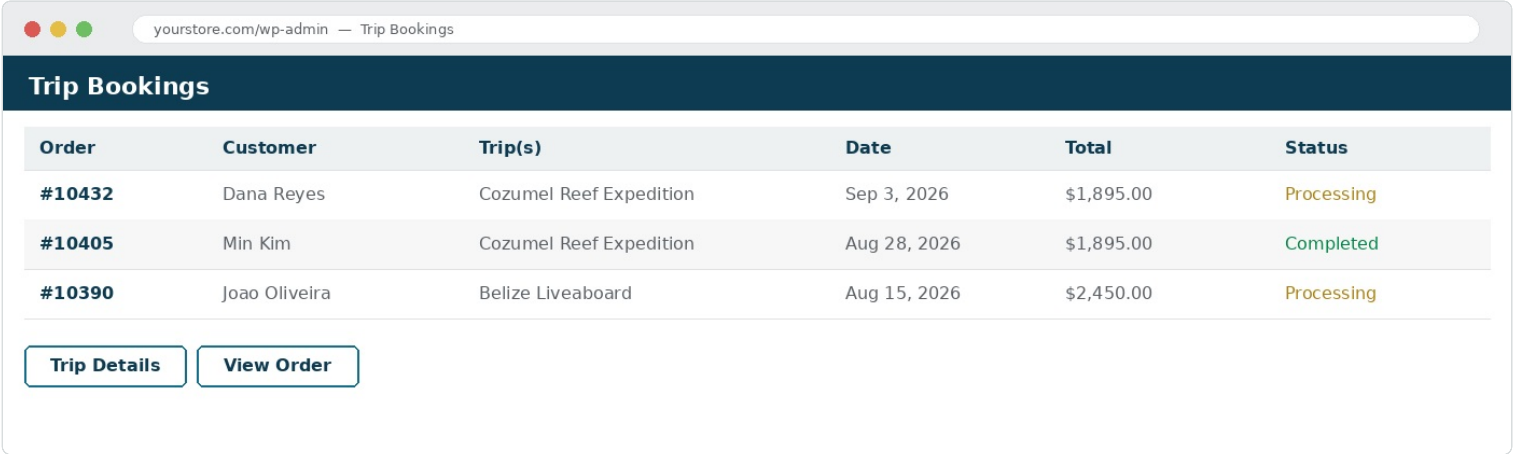
- **View Trip Details** — opens the customer-facing trip details page for that booking, in a new tab
- **Email Summary** — sends that one traveler a summary of their current payment status
- **Send Payment Reminder** — sends just this traveler a reminder (only shown when they actually have a pending payment; use Send Payment Reminders to All above to reach everyone at once instead)
- **View Order** — the standard WooCommerce order editor

Rows with an overdue payment are highlighted so they stand out immediately when scanning the list.

The Frontend Manifest Shortcode

Separately from the admin screen above, `[trip_manifest]` embeds a simpler, read-only manifest (Name, Email, Phone, Booked date) on any front-end page or post — useful for a staff-facing printed sign-in sheet or a simple public roster, without the payment detail or bulk actions of the admin view.

5. Bookings



Trip Bookings — every original booking order, across every trip, in one list.

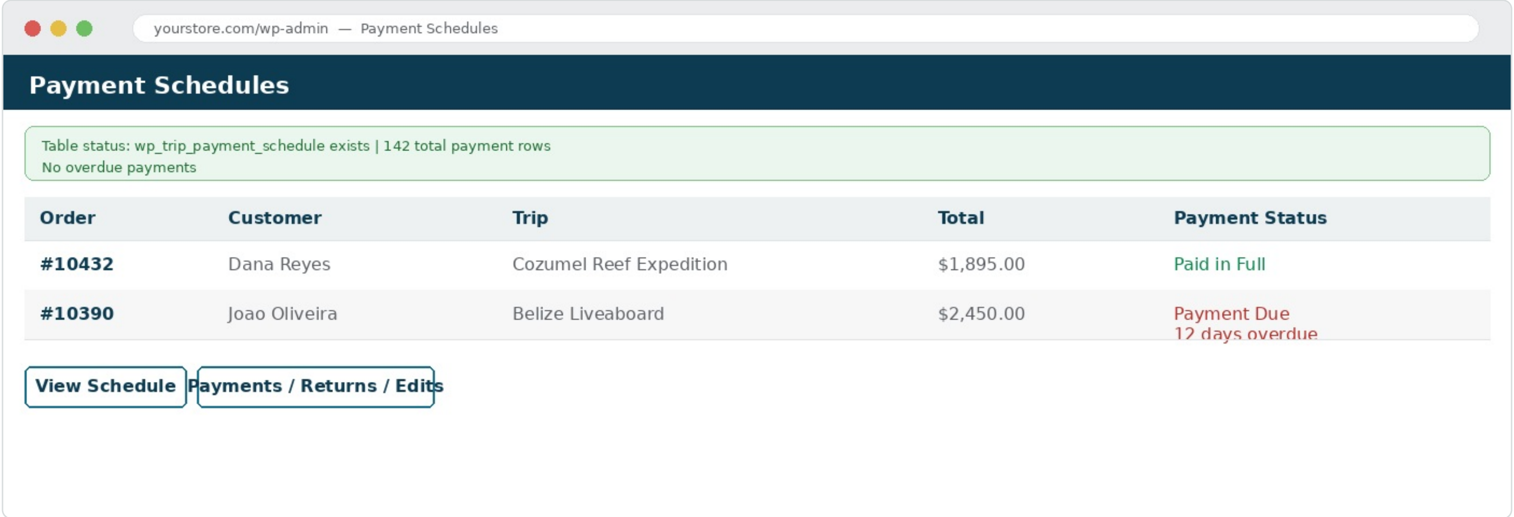
Go to **Travel Trips → Bookings**. Where Travel Overview (Section 8) shows every traveler for *one trip you select*, this screen shows the opposite view: every original booking order across *all* your trips at once, newest first, with archived trips excluded automatically.

Column	Description
Order	The WooCommerce order number, linked to the order editor. If that order has a payment schedule, a **View Payments** link opens a quick read-only summary in a popup without leaving this list.
Customer	The traveler's name from the order
Trip(s)	Every trip product on that order (usually one, but a single order can cover more than one trip)
Date	When the order was placed
Total	The order total — for a deposit-only order with a payment schedule attached, this shows the full scheduled total rather than just the deposit actually charged, so you see what's really owed
Status	The order's current WooCommerce status

Each row has two actions: **Trip Details** opens the customer-facing trip details page for that booking in a new tab (useful for seeing exactly what the traveler themselves would see), and **View Order** opens the standard WooCommerce order editor.

> **When to use this instead of Travel Overview:** reach for Bookings when you need to find a specific order or customer but don't already know which trip it's under — it's a flat, searchable-by-scrolling list spanning everything at once, rather than requiring you to first pick a trip.

6. Payments



Payment Schedules — every order with a payment plan, across every active trip.

Go to **Travel Trips → Payments**. This is the single, complete list of every order that has a payment schedule attached, across all your trips — unlike the Dashboard's Pending Payments widget (Section 2), which only shows what's overdue or due soon, this page shows everything, including orders already Paid in Full.

Step 1: Read the Diagnostic Banner

At the top of the page, a status banner confirms the payment schedule database table exists, shows the total number of payment rows stored, and reports how many are currently overdue — green if none, red if some are. If something is actually wrong (the table is missing, or rows exist but aren't displaying), this banner expands with specific diagnostic detail — table name, raw query results, even sample column names — to help track down what's misconfigured, rather than just failing silently.

Step 2: Read the Table

Column	Shows
Order	Linked to the WooCommerce order
Customer	The name on the booking
Trip	Which trip (or trips) this order covers
Total	The order's full total (using the original pre-discount total if one was set, so it reflects the true trip cost rather than just a deposit)
Payment Status	**Paid in Full** (green), **Payment Due** (amber, not yet overdue), or **Payment Due** with a red highlight and an exact overdue day count if it's actually late

Orders with an overdue payment are sorted to the top and highlighted with a red left border, so they're impossible to miss when scanning down the list.

Step 3: Act on an Order

- **View Schedule** — a quick read-only popup showing that order's full installment breakdown, without leaving this page
- **Payments / Returns / Edits** — opens the same dedicated per-order screen described in Section 3a: record an extra payment, process a refund, cancel the reservation, or adjust traveler add-ons

> **This page vs. Fix Payments (Section 13):** use this page for everyday monitoring and normal payment actions. Reach for Fix Payments instead only when a schedule itself is actually broken or wrong.

7. Add Customer (Manual Booking)

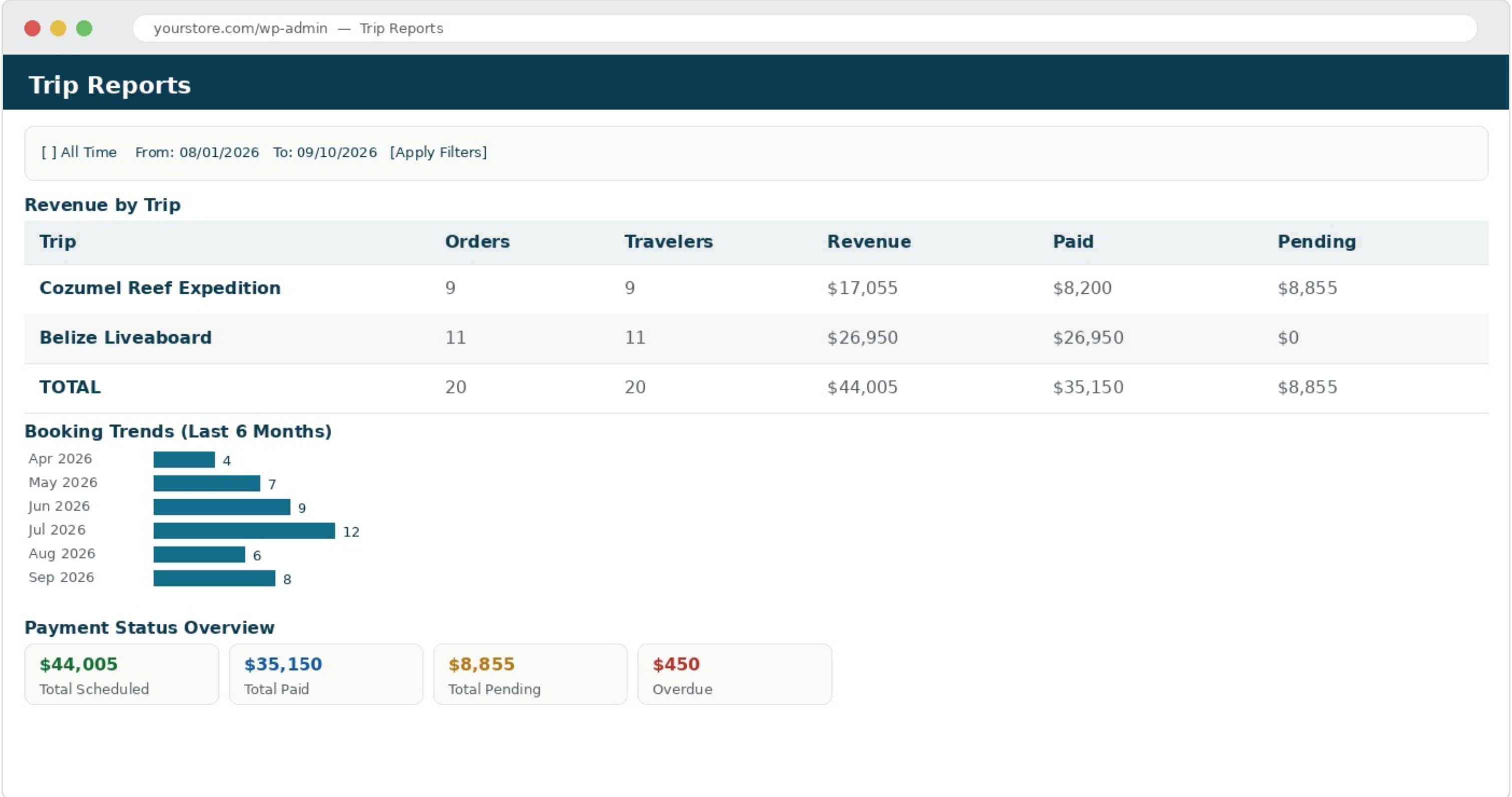
Create bookings without customer interaction via **Travel Trips → Add Customer** — useful for walk-ins, phone bookings, or correcting errors.

1. Select the trip; add-ons load automatically.
2. Search for an existing customer, or enable Guest Order mode and enter name/email.
3. Set the quantity (number of travelers) and select add-ons.
4. Enter a partial payment amount if the customer is paying now, or leave at 0 to create the order unpaid.
5. Click **Create Booking**.

The system automatically generates traveler forms for each traveler, creates the correct payment schedule, assigns Cost of Goods, and sends confirmation emails.

> **Note:** manual bookings respect per-trip deposit percentages and installment counts. A partial payment amount entered applies to the first installment only — it is not multiplied by traveler count.

8. Reports



Trip Reports — five separate reports stacked on one page.

Go to **Travel Trips → Reports**. This single page holds five separate reports, one below the other. The first three share one date filter at the top; the last two (Trip Expenses and Trip Profit Report) have their own separate filters further down the page.

8a. Date Filter (for the First Three Reports)

Check **All Time** to ignore dates entirely, or set a **From** and **To** date and click **Apply Filters**. This defaults to the last 30 days if you've never set it.

8b. Revenue by Trip

One row per active (non-archived) trip: **Orders** (original bookings only, not counting separate installment orders), **Travelers**, **Total Revenue**, **Paid**, and **Pending** — with a TOTAL row summing every trip together. This only counts orders placed within your selected date range.

8c. Booking Trends

A simple bar chart of bookings per month for the trailing 6 calendar months. Unlike the other reports on this page, this one always shows the same fixed 6-month window regardless of whatever date filter you've set above it.

8d. Payment Status Overview

Four totals across every active trip's payment schedule, store-wide — not limited by the date filter above, since it reflects your current overall position rather than a historical window:

Card	What it totals
Total Scheduled	Every payment ever scheduled, paid or not
Total Paid	The portion already collected
Total Pending	What's still owed, whether due yet or not
Overdue	The portion of Total Pending that's already past its due date

If Overdue is greater than $0, a yellow "Attention Required" notice appears beneath the cards suggesting you send payment reminders.

8e. Trip Expenses & Completion

Select a trip from its own dropdown to open an itemized expense tracker for that specific trip:

1. Check **Trip Completed** once the trip has actually run — this is what allows the Trip Profit Report (8f) to include it as a finished trip.
2. Optionally set a **Trip Date** — if set on a completed trip, profit reports use this date instead of the scattered order dates, which keeps a trip's profit grouped under one clean date even though its bookings came in over months.

3. Click **Add Expense** to log a cost: a name (e.g. "Fuel," "Hotel Deposit," "Dive Master"), an amount (enter a negative number to record a refund back to you), and a date. Add as many as you need — each trip can have its own running list.

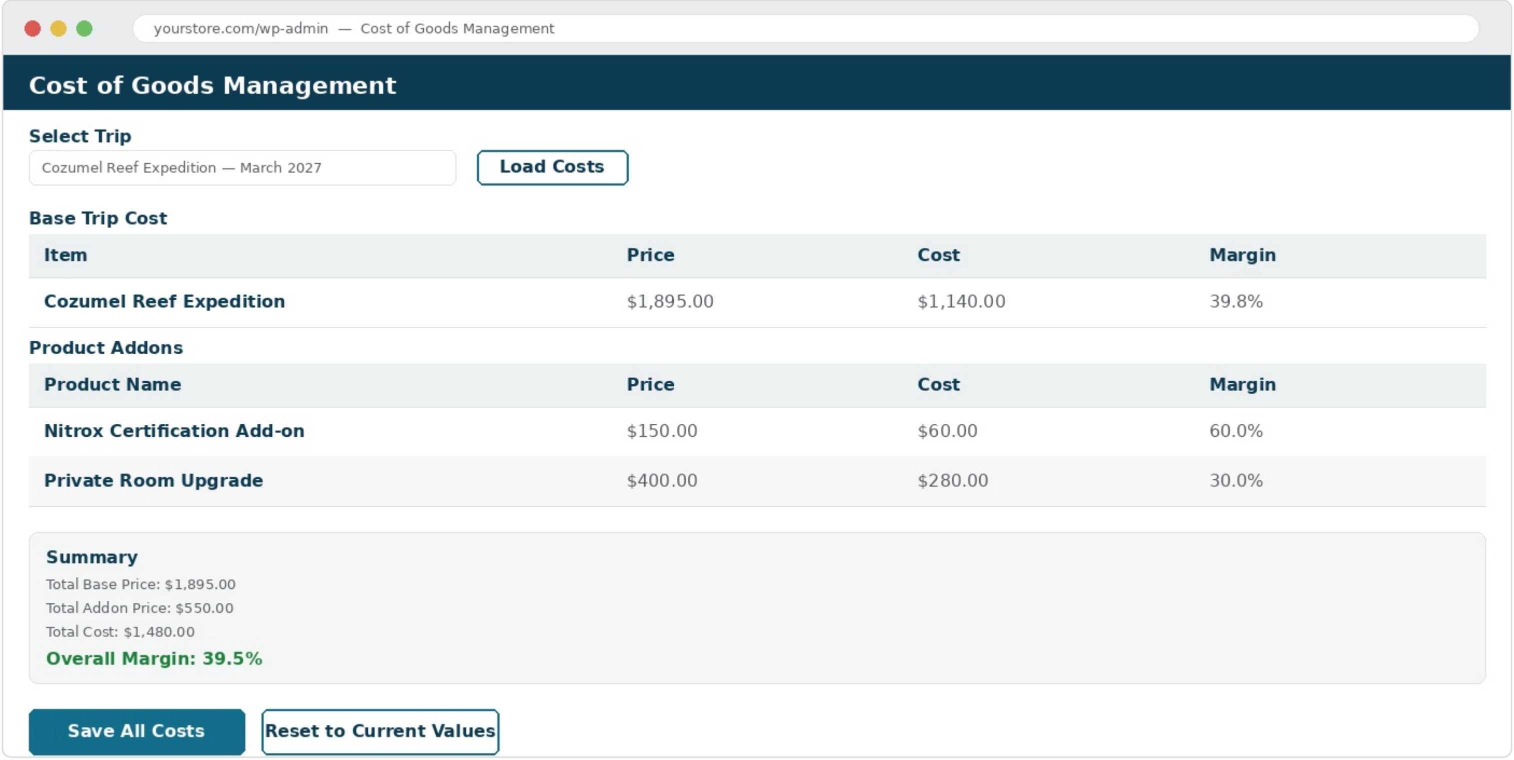
> **How this relates to the single "Total Trip Expenses" field on the trip product itself (Section 12):** that field is a simple one-number total; this itemized list is the detailed, line-by-line version for the same underlying cost tracking — use whichever level of detail fits how you actually want to record trip expenses.

8f. Trip Profit Report

The definitive per-trip profitability report, combining Cost of Goods (Section 9) with the itemized expenses above.

1. Set a date range or check **All Time**.
2. Under **Select Trips**, use **Select All** or check individual trips — archived trips are included in this list (clearly labeled "(Archived)") since a completed, archived trip is exactly the kind you'd want a profit report on.
3. Optionally filter by **Show Completed**, **Show Unarchived**, and/or **Show Archived** to narrow further.
4. Review the table: **Trip, Revenue, Base Cost, Add-ons Cost, Expenses, Total Cost, Profit, Margin %, Status**.
5. Click **Export CSV** to download the full report for spreadsheet analysis or record-keeping.

9. Cost of Goods



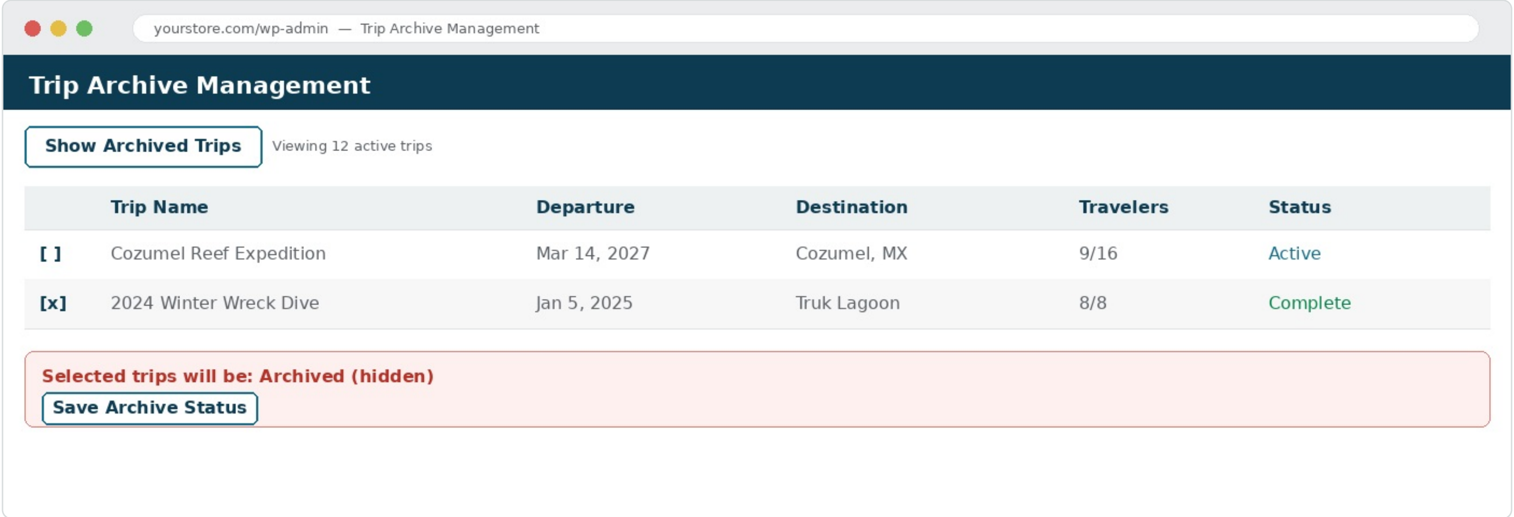
Cost of Goods Management — base trip, addons, and an overall margin, all in one place.

Go to **Travel Trips → Cost of Goods**. Rather than editing cost fields on the trip product and each add-on separately, this screen brings every cost for one trip into a single view.

1. Choose a trip from the **Select Trip** dropdown.
2. Click **Load Costs**.
3. Review three sections: **Base Trip Cost** (the trip product itself), **Simple Addons** (add-ons stored directly in the trip's own settings rather than as separate products), and **Product Addons** (add-ons that are their own linked WooCommerce products). Each row shows Price, Cost, and the resulting Margin.
4. Edit any Cost field directly in the table — Margin recalculates as you type.
5. Check the **Summary** at the bottom for the trip's totals: total base and addon price, total cost, and an overall margin across everything combined.
6. Click **Save All Costs** to write every change back at once, or **Reset to Current Values** to discard your edits and reload what's actually saved.

> **Why this exists:** a trip's true profitability includes every add-on sold alongside it, not just the base package — this view is built specifically to answer "what do we actually make on this trip once everyone's add-ons are factored in," which the trip product's own edit screen can't show on its own.

10. Archive



Archive Management — the view toggle determines what checking a box actually does.

Go to **Travel Trips → Archive**. Archiving a trip hides it from the places you'd normally work day-to-day — Travel Overview's trip dropdown, Manifests, Bookings, the Dashboard's Upcoming Trips — without deleting the trip itself or any of its orders. This keeps your active work screens uncluttered once you're running dozens or hundreds of trips a year, without losing any historical data. An archived trip can always be brought back.

Step 1: Understand What View You're In

This is the single most important thing to understand about this screen: **the same checkbox means the opposite thing depending on which view you're currently looking at.**

- By default, the page shows your **active trips**. A button reads **Show Archived Trips** — click it to switch views.
- Once you've switched, the page shows only your **archived trips** instead, and the button now reads **Show Active Trips** — click it again to switch back.

A small note next to the button always confirms which you're looking at right now (e.g. "Viewing 12 active trips" or "Viewing 3 archived trips").

Step 2: Select Trips and Save

1. Check the box next to any trip you want to change, or use the checkbox in the header to select every trip currently shown at once.
2. Before you save, a message directly above the Save button spells out exactly what's about to happen: **"Selected trips will be: Archived (hidden)"** if you're currently viewing active trips, or **"Selected trips will be: Unarchived (made visible)"** if you're viewing archived ones.
3. Click **Save Archive Status**. A confirmation message reports how many trips were archived and/or unarchived.

> **In short:** checking a box on the Active view archives that trip. Checking a box on the Archived view restores it. There's no separate "Archive" button on each row — the checkbox's meaning is entirely determined by which view you're currently on, so always check the note next to the toggle button before saving if you're not sure.

What Else Shows on This Screen

Each trip's row also shows its Departure Date, Destination, current Travelers count (against its max capacity), and Status — **Complete** (green, if it's been marked Trip is Complete on the trip product or via Trip Expenses & Completion, Section 8e) or **Active** (blue). An **Edit** link opens the trip product directly.

11. All Trips

Go to **Travel Trips → All Trips**. This isn't a custom screen at all — it's the standard WooCommerce **Products** list, pre-filtered to show only products of type Trip. Every column, bulk action, and filter you already know from managing regular WooCommerce products works exactly the same way here: search by title, filter by category, bulk-edit, trash, and so on.

Use this screen when you want the plain, familiar WooCommerce product list view of your trips — for example, to bulk-edit several trips at once, or to quickly find a trip by its product ID — rather than any of the trip-specific views elsewhere in this plugin (Dashboard, Travel Overview, Manifests, or Archive).

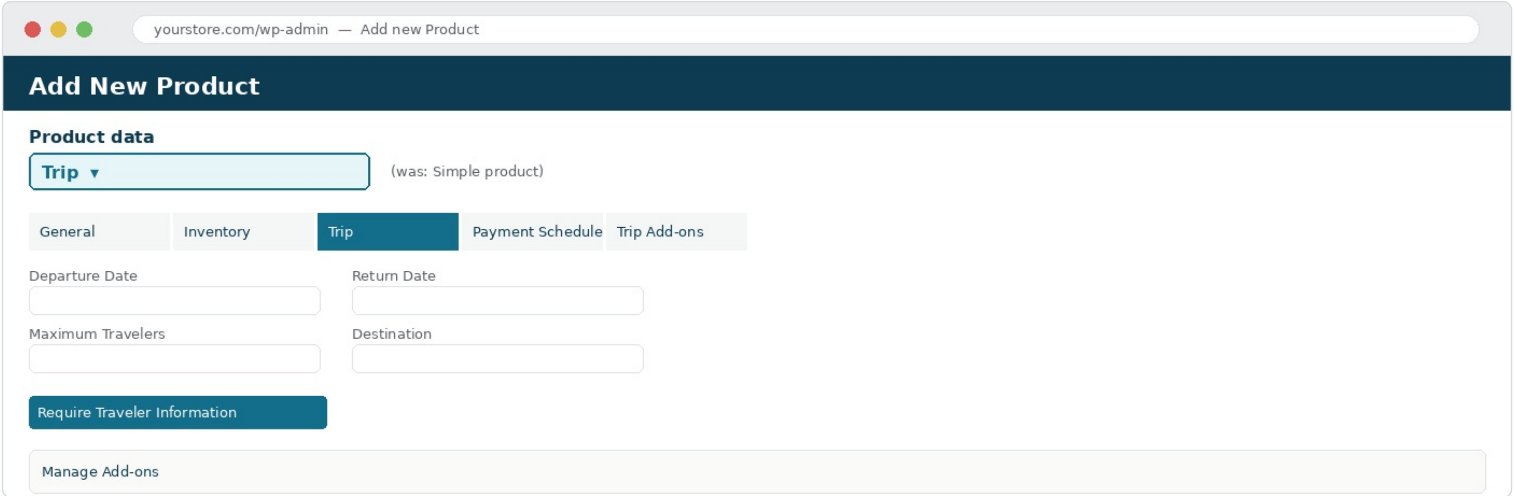
12. Add New Trip

A trip is a real WooCommerce product — just a special type of one. This plugin doesn't build trips anywhere separate from your normal catalog. It adds a new option, **Trip**, to the same "Product data" dropdown WooCommerce already uses for Simple, Variable, and Grouped products. Picking Trip from that dropdown is what unlocks everything else on this page — new tabs, the payment plan system, the waiver box, and so on. If you've ever added a normal product to WooCommerce before, this will feel familiar with a few extra tabs added in.

12a. Start a New Product

1. Go to **Travel Trips → Add New Trip** (a shortcut that opens the standard **Products → Add New** screen with Trip already selected), or go to **Products → Add New** yourself and pick it manually in Step 12b.
2. Enter the trip title (e.g. "Cozumel Reef Expedition — March 2027"), description, and a featured image, exactly like any other WooCommerce product.

12b. Set the Product Type to "Trip"



The Product data dropdown — Trip sits alongside Simple, Variable, and Grouped.

1. Find the **Product data** box partway down the page — the dropdown at its top-left normally reads "Simple product."
2. Change it to **Trip**. The panel below the dropdown changes to show trip-specific tabs instead of the usual ones.

If you used the "Add New Trip" shortcut in 12a, this dropdown is already set to Trip for you — you can skip straight to 12c.

12c. Fill In the Trip Tab

Field	What it's for
Departure Date / Return Date	When the trip starts and ends
Maximum Travelers	The hard cap on bookings — there is no separate minimum-travelers setting, just this one capacity number
Destination	A free-text location (e.g. "Cozumel, Mexico") shown to customers and used throughout the admin screens
Require Traveler Information	On by default for new trips — collects traveler details (name, email, emergency contact, and anything else configured in your Traveler Form, Section 15) before checkout. Turn it off only for a trip where you genuinely don't need any traveler details collected.

12d. Set the Price

Set the **Regular Price** on the General tab, exactly as you would on any WooCommerce product — this is the per-person cost of the trip.

12e. Set Payment Options (Deposit, Fees & Discounts)

Still on the Trip tab, under **Payment Options**:

Field	What it does
Enable Deposit Payment	Lets customers pay a deposit instead of the full amount at checkout, for this trip
Deposit	What portion of the total is due now if a customer chooses the deposit option (e.g. 30)

Percentage (%)	
Number of Installments	How many payments in total, including the deposit (2–12)
Credit Card Fee (%)	An added surcharge for paying by credit card — use this to pass along processing fees rather than absorbing them
Cash Discount (%)	A discount for paying by cash or check instead of card
Disable Cash/Check Online	Hides the cash/check discount option on the website entirely and shows your custom message instead (below) — use this if you want cash/check payments arranged by phone only, not self-served online
Cash/Check Message	Shown on the product page in place of the cash option when Disable Cash/Check Online is checked (e.g. "Call us to make payments with check or cash for a discounted price!")

12f. Configure a Custom Payment Schedule (Optional)

The **Payment Schedule** tab is separate from Payment Options above, and only needed if you want named, individually-dated installments rather than just an even split — for example, a deposit at booking, a second payment 90 days out, and a final balance due at 30 days out.

1. Open the **Payment Schedule** tab.
2. Add one row per payment: a **label** (e.g. "Deposit," "Second Payment," "Final Balance"), a **percentage** of the total, and how many **days before departure** it's due (the deposit is always due at booking itself).
3. Percentages across every row must add up to 100%.

12g. Add Trip Add-ons (Optional)

Click **Open Trip Add-ons Manager** in the Trip tab (or use the separate **Trip Add-ons** tab) to offer optional upgrades alongside the base trip — a Nitrox certification, a private room, extra gear rental, and so on. Two kinds are supported side by side, and both are offered **per traveler** on the product page (Section 15a), not once per order:

- **Simple add-ons** — a plain checkbox with a name and price, not tied to any product or its own inventory
- **Product add-ons** — linked to a real WooCommerce product, so it draws on that product's own stock/inventory tracking, and shows its own stock status and a link to view that product

12h. Set the Waiver (Optional)

In the **Trip Waiver** box in the sidebar, choose which waiver template applies to this trip from the **Select Waiver Template** dropdown (or leave it on "No Waiver Required"). This dropdown automatically lists templates from whichever provider you selected in Settings — Smartwaiver or SL Waivers & Leases — so this one box works the same way no matter which you're using. Full setup for both providers is in Section 14f.

12i. Configure the Traveler Form (Optional)

Use the **Traveler Form Configuration** meta box to choose which fields this specific trip collects, or rely on the store-wide defaults set up in Settings (Section 14h).

12j. Publish

Click **Publish**, the same as any WooCommerce product. The trip is now live and bookable.

Cash Payment Instructions & Cost Tracking

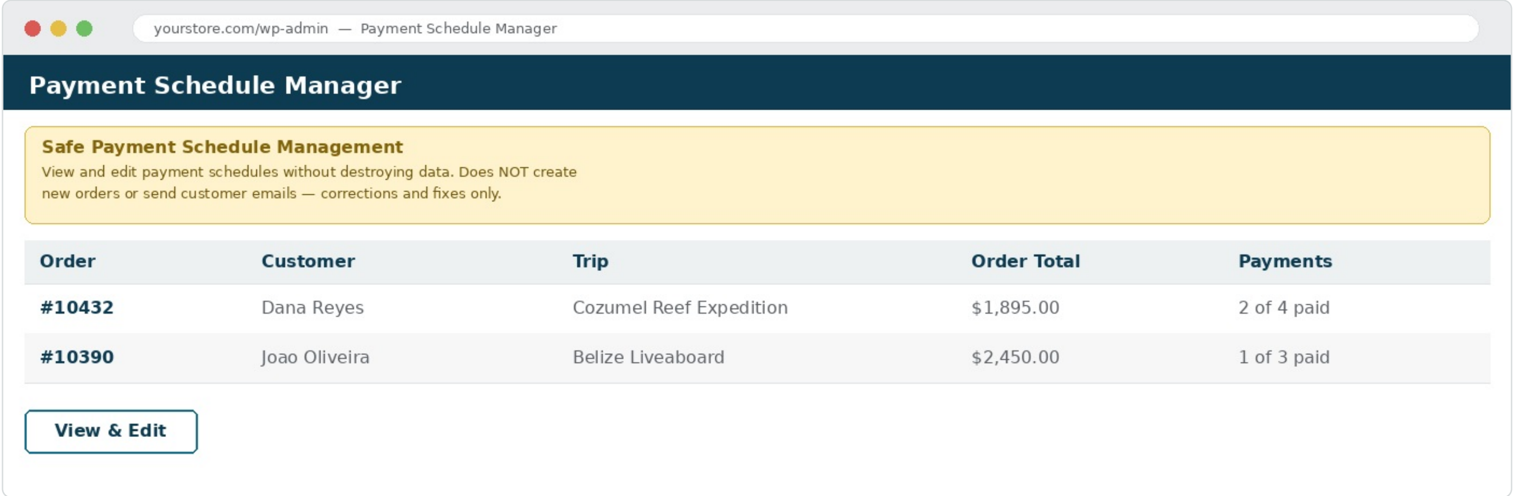
Two more sections live on the Trip tab, further down:

- **Check Mailing Address** — shown to a customer who chooses to pay by check or wire at checkout, on this specific trip (leave blank to use the store-wide default from Settings, Section 14e)
- **Total Trip Expenses** and **Trip is Complete** — a simple single-number total for your actual costs (hotels, flights, guides); check Trip is Complete to have the plugin calculate and display profit (Revenue − Expenses) on every order for that trip. For a detailed, line-by-line expense list instead of one lump sum, use Trip Expenses & Completion in Reports (Section 8e).

Multi-Traveler Bookings

When quantity is set to 2 or more at checkout, each traveler becomes a separate order line item — each with its own add-ons selection, traveler form, and payment record, so you can track every person through the trip lifecycle individually.

13. Fix Payments



Payment Schedule Manager — a safe, targeted way to correct one order's schedule.

> **This is a correction tool, not a routine one:** use Travel Overview (Section 3), Payments (Section 6), or Add Customer (Section 7) for everyday payment recording. Reach for this screen specifically when a payment schedule itself is wrong — missing a payment, showing the wrong amount, or out of sync with what the customer actually paid.

Go to **Travel Trips → Fix Payments**. It lists every order containing a trip product (most recent 100), each showing the customer, trip, order total, and how many of its scheduled payments are marked paid.

1. Find the order and click **View & Edit**.
2. The order's customer, trip, total, order date, and departure date are shown for context.
3. If separate payment orders exist for this booking (installments paid as their own WooCommerce orders), a blue notice lists each one with its date and amount, and suggests marking the matching row below as Paid using those same figures — this is the most common reason to use this tool at all.
4. In the **Payment Schedule** table, edit any payment's **Amount**, **Due Date**, **Status**, **Paid Date**, or **Method** directly.
5. Click **Add Payment** to insert an additional scheduled payment, or use a row's own action to remove one.
6. Click **Save Changes** to apply everything, or **Cancel** to back out without changing anything.

What this tool deliberately does **not** do: it never creates a new WooCommerce order, and it never emails the customer. It only updates the payment schedule database table directly — exactly what you want for a correction, and nothing more.

14. Settings

Go to **Travel Trips → Settings**. This one page holds every store-wide configuration option, organized into the sections below.

14a. Default Payment Settings

Field	What it does
Default Deposit Percentage	The deposit percentage used for new trips — any individual trip can override this on its own Payment Schedule tab (Section 12e)
Default Number of Installments	How many payments (including the deposit) a new trip's payment plan has by default
Payment Reminder (Days)	How many days before an installment's due date to automatically send a reminder email

14b. Manifest Settings

Check **Require manifest information at checkout** to make traveler details mandatory before a customer can complete checkout, store-wide.

14c. Email Notifications

Check **Send automatic email notifications** to enable the plugin's automatic emails: payment schedules, payment reminders, and trip confirmations. Turn this off only if you're handling all customer communication manually or through another system.

14d. Customer Portal Settings

Set a **Browse Trips Button URL** — a custom link for the "Browse Trips" button shown in the Customer Payment Portal (Section 15) when a logged-in customer has no bookings yet. Leave it blank to fall back to the default: your product archive filtered to trips.

14e. Cash Payment Settings

Enter a **Check Mailing Address** — shown on the order confirmation page to any customer who chooses to pay by check or wire transfer. This is the store-wide default; an individual trip can set its own address instead on its own product page (Section 12).

14f. Waiver Integration — Smartwaiver or SL Waivers & Leases

This plugin doesn't run its own waiver-signing system — it connects to one of two providers, and you choose which one in Settings. Everywhere else in this plugin (the Trip Waiver box on a trip product, Travel Overview's Download Waivers button, bulk waiver downloads) works identically no matter which you pick; only the setup differs.

Step 1: Choose Your Provider

Go to **Travel Trips → Settings → Waiver Integration** and set **Waiver Provider** to one of:

Provider	What it is	Setup required
Smartwaiver	A separate, paid third-party waiver service with its own account	An API key, plus a webhook connection back to your site
SL Waivers & Leases	The free Streamline waiver plugin, already installed on this same WordPress site	None — no account, no API key, no webhook. If it's active on your site, it just works.

Switching providers later doesn't lose your setup on either side: each trip's chosen waiver template is stored separately per provider, so switching back and forth never overwrites one provider's template selections with the other's. What it does mean is that after switching, you'll need to go back to each trip and pick a template again for the newly-selected provider — the two systems don't share templates with each other, since Smartwaiver's are hosted remotely and SL Waivers & Leases' are ordinary posts on your own site.

If you select SL Waivers & Leases but it isn't actually installed and active, the Settings page shows a clear red warning telling you to install/activate it or switch back to Smartwaiver — the Trip Waiver dropdown on trip products will otherwise show an error instead of a template list.

Step 2a: If You Chose Smartwaiver

1. Log into `app.smartwaiver.com` → Settings → API and copy your API key.
2. Back in WordPress, paste it into the **Smartwaiver API Key** field (only shown when Smartwaiver is the selected provider) and click **Test Connection**.
3. Click **Save Settings** — note the Webhook URL shown on the page.
4. Back in Smartwaiver, go to Settings → Webhooks, paste the webhook URL, set the trigger to **After Email Validation**, enable webhooks, and save.

Step 2b: If You Chose SL Waivers & Leases

Nothing to configure here at all — as long as the SL Waivers & Leases plugin is installed and active on this site, its templates are available immediately.

> **Which document types count as a "waiver" here:** only SL Waivers & Leases documents set up as a Waiver, Lease, or Questionnaire are offered in the Trip Waiver dropdown — its Event type isn't a signable document, so those don't appear as an option.

Step 3: Set a Template on Each Trip

On each trip product, open the **Trip Waiver** box in the sidebar and choose a template from the **Select Waiver Template** dropdown (Section 12h) — the list is pulled live from whichever provider is currently selected.

Sending & Viewing Waivers

From Travel Overview (Section 3), use the Download Waivers button, or the per-traveler waiver actions in the expanded row, to email a waiver link or view a signed one:

- **Smartwaiver:** the traveler receives a link to sign at app.smartwaiver.com, which can prefill their name and email automatically. Viewing a signed waiver opens it at app.smartwaiver.com — **you must already be logged into your Smartwaiver account in that browser** for the link to open correctly, or you'll land on a login screen first.
- **SL Waivers & Leases:** the traveler receives a link to sign right on your own site. Since the signing form lives on your site rather than a remote service, it can't prefill the traveler's name/email from the link the way Smartwaiver does — the traveler types their own information directly on the form. Viewing a signed record opens it in a printable view within your own WordPress admin, so there's no separate login to worry about.

Automatic Status Tracking

With **Smartwaiver**, completing a waiver sends a real-time webhook to your site (set up in Step 2a), and the plugin automatically marks that traveler's waiver complete in Travel Overview — no manual checking required, as long as the webhook is configured correctly. With **SL Waivers & Leases**, there's no webhook involved at all since everything lives on the same site — the plugin simply checks that plugin's own signed-documents records directly whenever Travel Overview loads, so status is always current with no separate setup step needed.

14g. Travel Form Terms & Conditions

Admin Setup

Go to **Settings → Travel Form Terms & Conditions** and choose:

- **Text** — write or paste your terms in the rich-text editor (headings, bold, bullet lists, and links supported), then Save Settings.
- **PDF Document** — choose a file, click Upload, then Save Settings.

What Travelers See

Near the bottom of the Traveler Form: "By checking you agree to Travel Terms and Conditions." Clicking the link opens a full-screen popup with the complete terms (text or embedded PDF), a Print button, and an Accept & Close button that automatically checks the box. **The form cannot be submitted without this checkbox checked.**

14h. Traveler Form Settings

1. Choose your **Traveler Form Page** — the page carrying the `[trip_traveler_form]` shortcode (Section 15). The plugin sends travelers here to fill out their information.
2. Build the fields this form collects store-wide: name, date of birth, nationality, passport details, emergency contact, flight details, dive certification, and so on. An individual trip can further customize which of these fields it actually requires via its own Traveler Form Configuration meta box (Section 12i).

14i. System Information

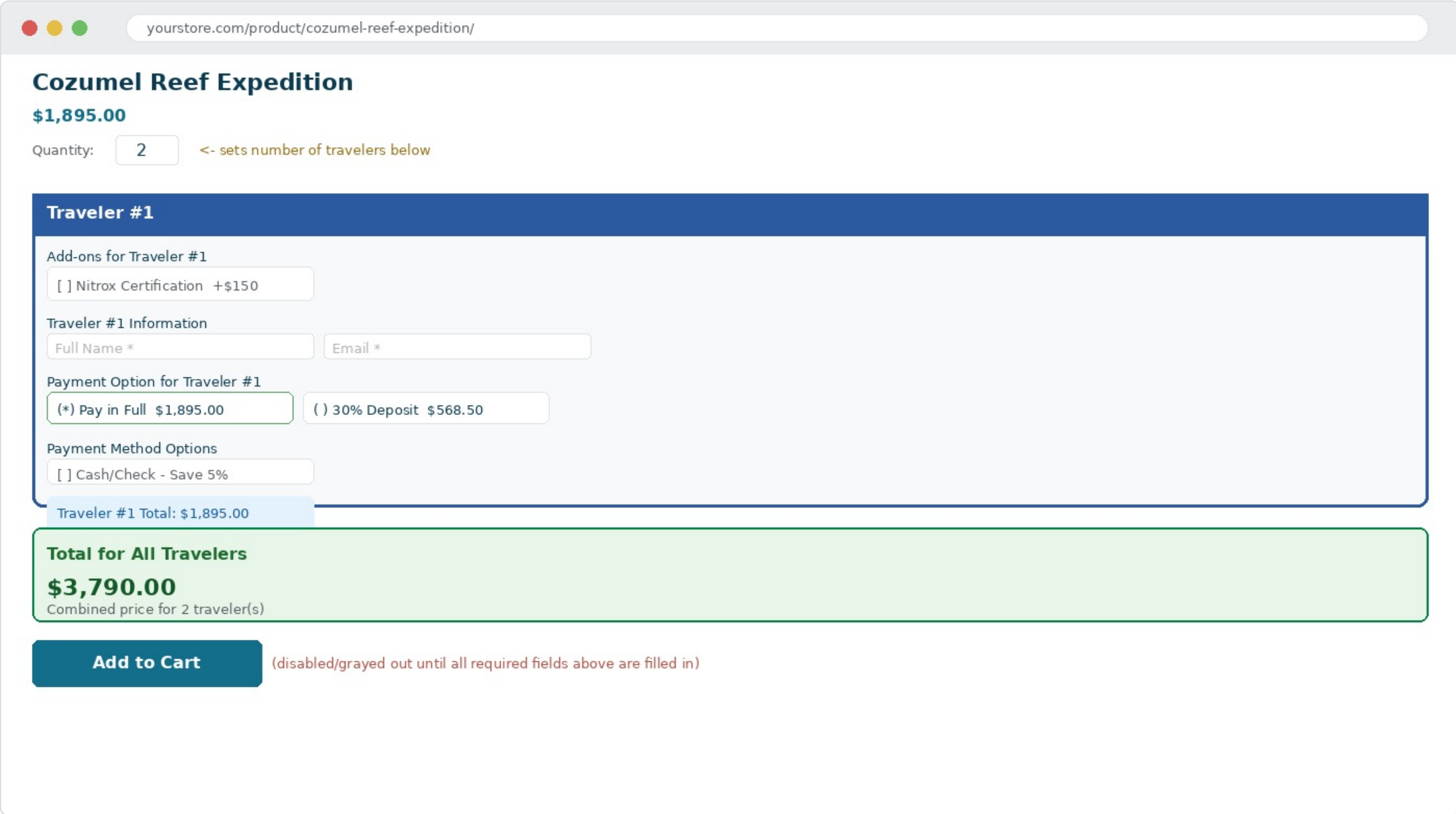
A read-only diagnostic panel — useful when troubleshooting with support:

- **Plugin Version**
- **Database Tables** — confirms whether the manifest and payment schedule tables exist
- **Total Records** — the number of manifest entries and payment schedule rows currently stored

Click **Save Settings** at the bottom of the page to apply any changes across every section above at once.

15. Traveler-Facing Pages & Shortcodes

15a. The Trip Product Page — What Customers Actually See



The live trip product page — quantity drives the number of traveler sections shown below it.

> **This is the real booking form, not a placeholder:** almost everything a customer configures about their trip happens right here on the product page, before they ever reach checkout — not on a separate booking form. It's all generated live by JavaScript as the customer interacts with the page.

1. The customer opens the trip product page and sees the usual title, price, and description, plus a standard WooCommerce **Quantity** field.
2. **Quantity is how many travelers this booking is for** — it isn't a generic "how many of this item" field the way it is on a normal product. Changing it immediately adds or removes whole traveler sections below.
3. For each traveler, a numbered section appears (Traveler #1, Traveler #2, and so on), each containing:
   - **Add-ons for this traveler** — every Simple and Product add-on configured on the trip (Section 12g), offered individually per traveler, not once for the whole order. A product add-on shows its own stock status and a link to view it if it's independently visible in your catalog.
   - **Traveler Information** — shown only if Require Traveler Information is on for this trip (Section 12c): Full Name, Email, Phone, Date of Birth, Home Address, an Emergency Contact name and phone, and an optional Special Requirements / Dietary Restrictions field. This is the same basic information collected right here at booking time — separate from, and simpler than, the more detailed Traveler Form sent by email afterward (Section 15c).
   - **Payment Option for this traveler** — Pay in Full, or (if Enable Deposit Payment is on for this trip, Section 12e) a deposit option showing the exact percentage and dollar amount.
   - **Payment Method Options** — a Credit Card surcharge notice if one's configured, and a Cash/Check discount checkbox if cash is allowed online (or your custom message instead, if you've disabled it — Section 12e). Only one payment-method option can be checked per traveler at a time.
   - A running **Traveler Total** for that person alone.
4. A **Total for All Travelers** box at the bottom sums every traveler's total into the order's grand total, updating live as anything above changes.
5. If Require Traveler Information is on, the **Add to Cart** button stays disabled (grayed out) until every required field, for every traveler, is filled in — there's no way to add an incomplete booking to the cart.

15b. The Traveler Form (Sent After Booking)

After booking, each traveler additionally receives a secure, unique link to complete a more detailed information form, hosted on the page carrying the `[trip_traveler_form]` shortcode (set up during Installation, Section 1, and configured in Settings, Section 14h). This is separate from, and more detailed than, the basic Traveler Information collected on the product page itself (Section 15a) — it covers the kind of detail that's impractical to ask for at the moment of booking.

Fields collected typically include:

- Passport number, country of issue, issue and expiry dates
- Nationality

- Inbound and outbound flight details
- Diving certification level and certifying agency
- Equipment preferences

Exactly which of these a given trip actually requires is configurable per trip via the Traveler Form Configuration meta box on the trip product (Section 12i), or left at your store-wide defaults (Section 14h).

Token Security & Resending

Each form link carries a secure access token, stored redundantly for reliability across sessions. If a traveler's link is invalid or expired, they see a clear message and should contact you for a new one — resend from **Travel Overview** (Section 3) by clicking the link icon next to that traveler. Travel Overview shows the form completion date for each traveler, or "Not completed" with a warning icon, and completed forms can be opened and printed directly from there.

15c. Checkout — Card vs. Cash/Check

What a customer sees at checkout depends entirely on which Payment Method Option they picked back on the product page (Section 15a):

- **Credit card (no discount checkbox selected):** the customer proceeds to your store's normal WooCommerce checkout page, paying through whichever payment gateway you have configured, with any Credit Card Fee (Section 12e) added to the total.
- **Cash/Check discount selected:** the customer is automatically redirected away from the normal checkout to a dedicated **Cash Payment Checkout** page instead (the page behind the `[trip_cash_checkout]` shortcode) — no card fields are shown at all.

The Cash Payment Checkout page shows:

1. A notice explaining that cash was selected, and that the order will be created as **Pending Payment** while your team arranges collection with them directly.
2. An **Order Summary** showing the trip, the cash discount applied, and the resulting total — transparently showing what the price would have been without the discount alongside the discounted price.
3. A **Billing Information** form to complete the order.

Submitting creates the order, generates its payment schedule and manifest entries exactly the same as a card order would, and leaves it in Pending status until you record payment yourself (Travel Overview, Payments, or Fix Payments — Sections 3a, 6, 13).

15d. The Customer Payment Portal

Customers access their bookings and installment schedules from **My Account → Trip Payments** (also embeddable elsewhere via `[trip_customer_portal]`). From there they can:

- View all trip bookings and payment schedules
- See which installments are paid, pending, or overdue
- Pay an individual installment online via any active WooCommerce payment gateway
- Download payment receipts

If they have no bookings yet, a "Browse Trips" button sends them to the URL configured in Settings (Section 14d).

15e. All Shortcodes

Shortcode	Description
`[trip_traveler_form]`	The detailed post-booking traveler form (15b)
`[trip_customer_portal]`	Customer-facing bookings, schedules, and installment payment (15d)
`[trip_payment_schedule]`	Displays the payment schedule for an order
`[trip_manifest]`	Displays a simple, read-only trip manifest (Section 4)
`[trip_addons]`	Renders the trip add-ons selector (internal use — this is what powers the on-page traveler sections in Section 15a)
`[trip_cash_checkout]`	The custom checkout page for cash/check payments (15c)

15f. REST API Reference

For POS and other external integration, the plugin exposes REST endpoints under the `streamline/v1` namespace (WooCommerce API authentication required), including `GET /streamline/v1/trip-products` and `POST /streamline/v1/manual-booking`.

16. Troubleshooting & Quick Reference

Issue	What to check
Traveler form link doesn't work	The token may have expired — resend a fresh link from Travel Overview's link icon (Section 3, Section 15b).
Waiver status not updating automatically	On Smartwaiver: confirm the webhook is configured with trigger "After Email Validation" and enabled (Section 14f). On SL Waivers & Leases: there's no webhook to configure at all — status is checked live, so this points to the SL Waivers & Leases plugin itself not being active rather than a webhook problem.
Only one download tab opens (Download Traveler Forms / Waivers)	Allow pop-ups for your WordPress admin domain in your browser settings (Section 3).
Waiver link shows a login screen	On Smartwaiver, log into app.smartwaiver.com in that browser first, then retry. SL Waivers & Leases never shows this, since viewing happens in your own WordPress admin (Section 14f).
Archived a trip by accident, or unarchived the wrong one	Check which view you were on before saving — checking a box archives on the Active view and restores on the Archived view (Section 10). Just switch views and reverse it.
A trip isn't showing up anywhere active	Check whether it's been archived (Section 10) before assuming something's broken.
Payments page shows a database warning	The banner at the top of Payments (Section 6) gives specific diagnostics — table existence, raw row counts, sample columns — use those details if you need to contact support.
Trip Profit Report doesn't include a trip you expect	Confirm the trip is marked Trip Completed (Section 8e or 12) and that your Show Completed/Unarchived/Archived filters (Section 8f) actually include it.

Create a new trip	Travel Trips → Add New Trip (Section 12)
Record a payment or process a refund	Travel Overview or Payments → Payments / Returns / Edits (Section 3a)
See every payment schedule, not just overdue ones	Travel Trips → Payments (Section 6)
Fix a broken payment schedule	Travel Trips → Fix Payments (Section 13)
Print a manifest or message every traveler at once	Travel Trips → Manifests (Section 4)
Book a walk-in customer	Travel Trips → Add Customer (Section 7)
See real profit per trip, including expenses	Travel Trips → Reports → Trip Profit Report (Section 8f)
Check or edit per-trip margins	Travel Trips → Cost of Goods (Section 9)
Hide a past trip from active screens	Travel Trips → Archive (Section 10)
Bulk-edit trips like normal WooCommerce products	Travel Trips → All Trips (Section 11)
Switch between Smartwaiver and SL Waivers & Leases	Travel Trips → Settings → Waiver Integration (Section 14f)