

One tour file. The whole journey connected.

A solution-design case study built on the Flamingo Travel system: e-commerce, cross-department ERP, an AI assistant and role-based business apps.

FLAMINGO TRAVEL / SOLUTION-DESIGN CASE STUDY

From the website to one continuous tour file.

The review follows the **12-step Sales** · **6-step Operations** · **5 Accounting task groups** and the modules present in the Flamingo demo. The focus is integration and the handover, approval and reconciliation points.

Evidence status

E-commerce/ERP screens are captured from the existing demo UI with record, customer, date, booking and finance data redacted. The AI assistant and three mobile apps are captured from CTC Smart Tech prototypes designed from the Flamingo documentation. Not evidence of acceptance or production performance.

01 · Intake

The B2C website or a B2B request creates input for Sales.

02 · Quote

Normalise the request, build the itinerary, price by supplier and version.

03 · Handover

Customer confirms → check Form 1 and pre-arrival documents.

04 · Operations

Book services, assign guides, track confirmations and COD deadlines.

05 · Tour delivery

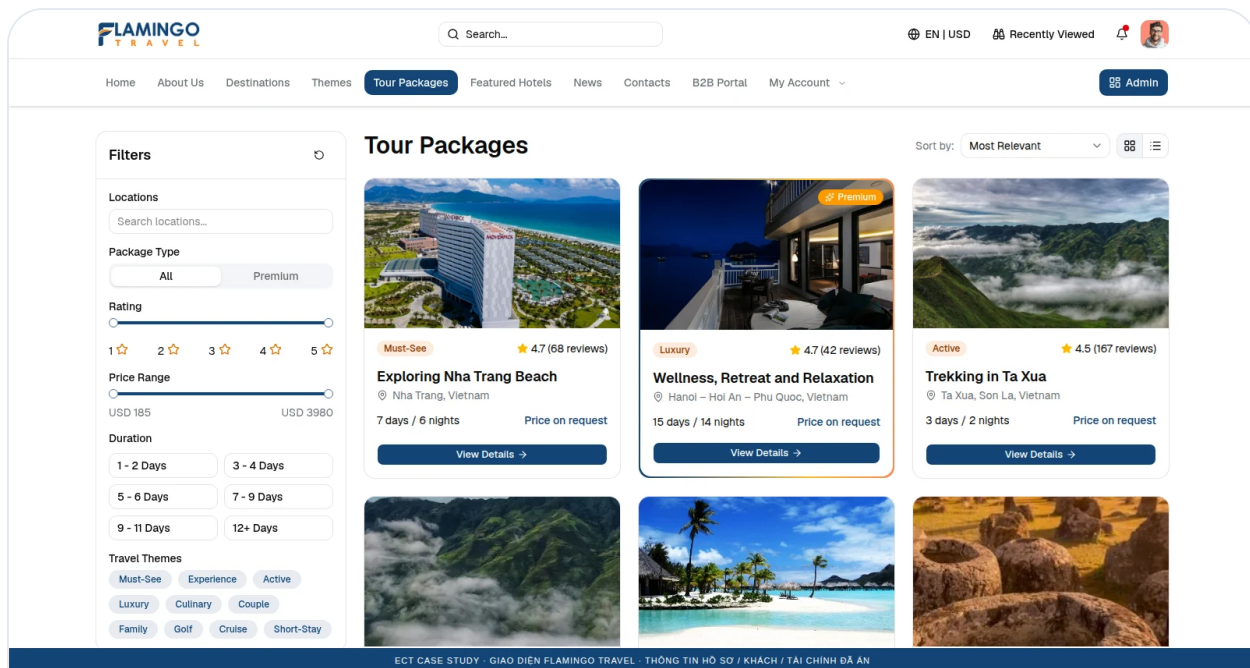
Guides update checklists; incidents go to authorised people.

06 · Settlement

Reconcile cash in/out, invoices, variances and post-tour care.

01 / EXISTING SYSTEM

Flamingo e-commerce & ERP



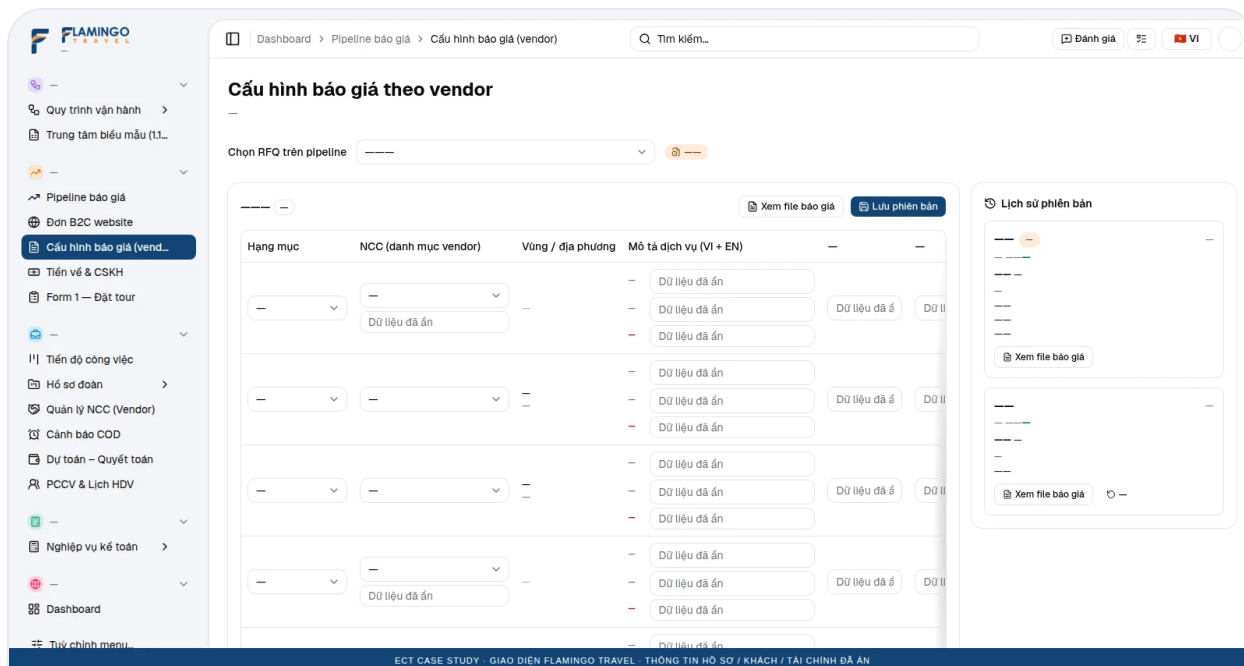
System screenshot · data redacted

E-commerce & tour sales channel

Customers browse tour products, send requests or start booking; B2C intake is organised for Sales to pick up.

Source screen: /tour-packages · record data redacted; click to enlarge.

System screenshot · data redacted

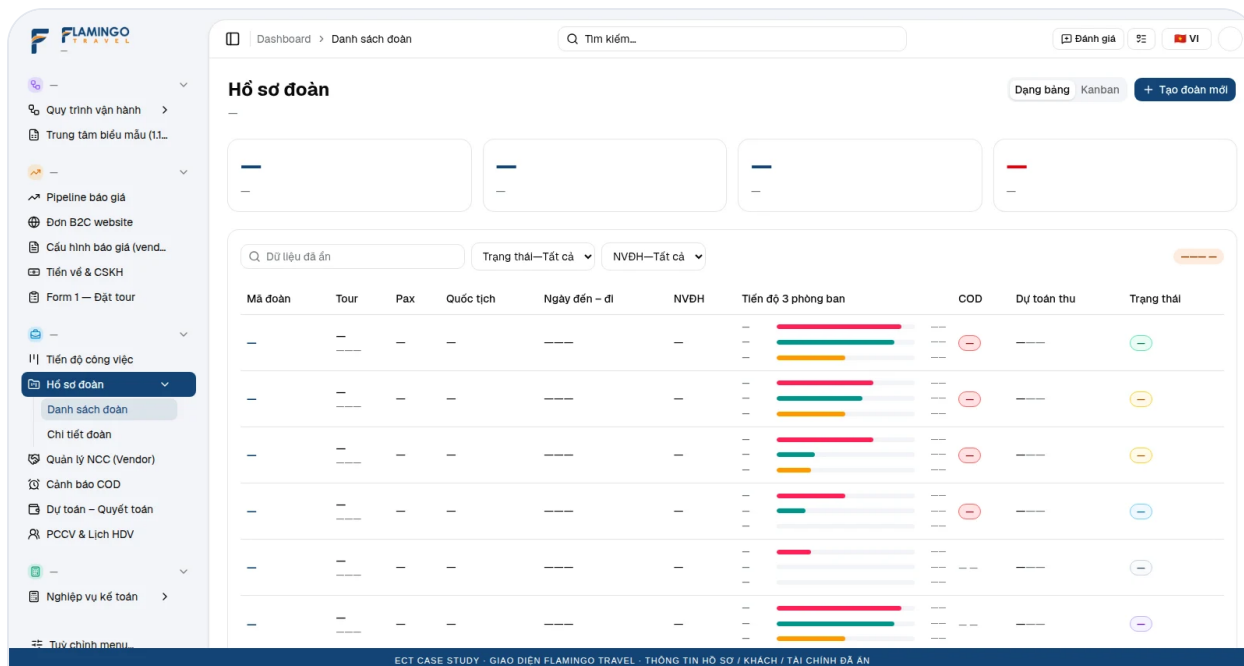


System screenshot · data redacted

Supplier-based quote builder

Prices computed from services, norms and supplier conditions; versioned, with change explanations before sending to the customer.

Source screen: </dashboard/sales/quotes> · record data redacted; click to enlarge.

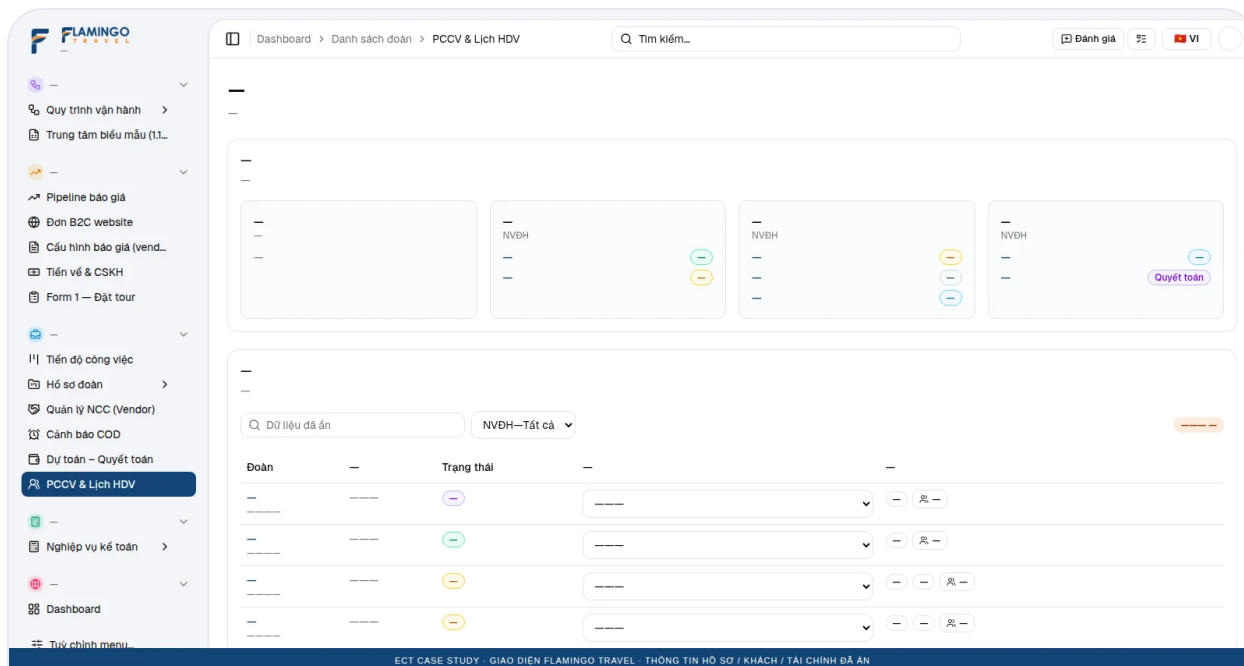


System screenshot · data redacted

Tour file: the ERP's connecting point

Tracks Sales–Operations–Accounting per tour; Form 1 handover, service bookings and task progress.

Source screen: </dashboard/ops> · record data redacted; click to enlarge.

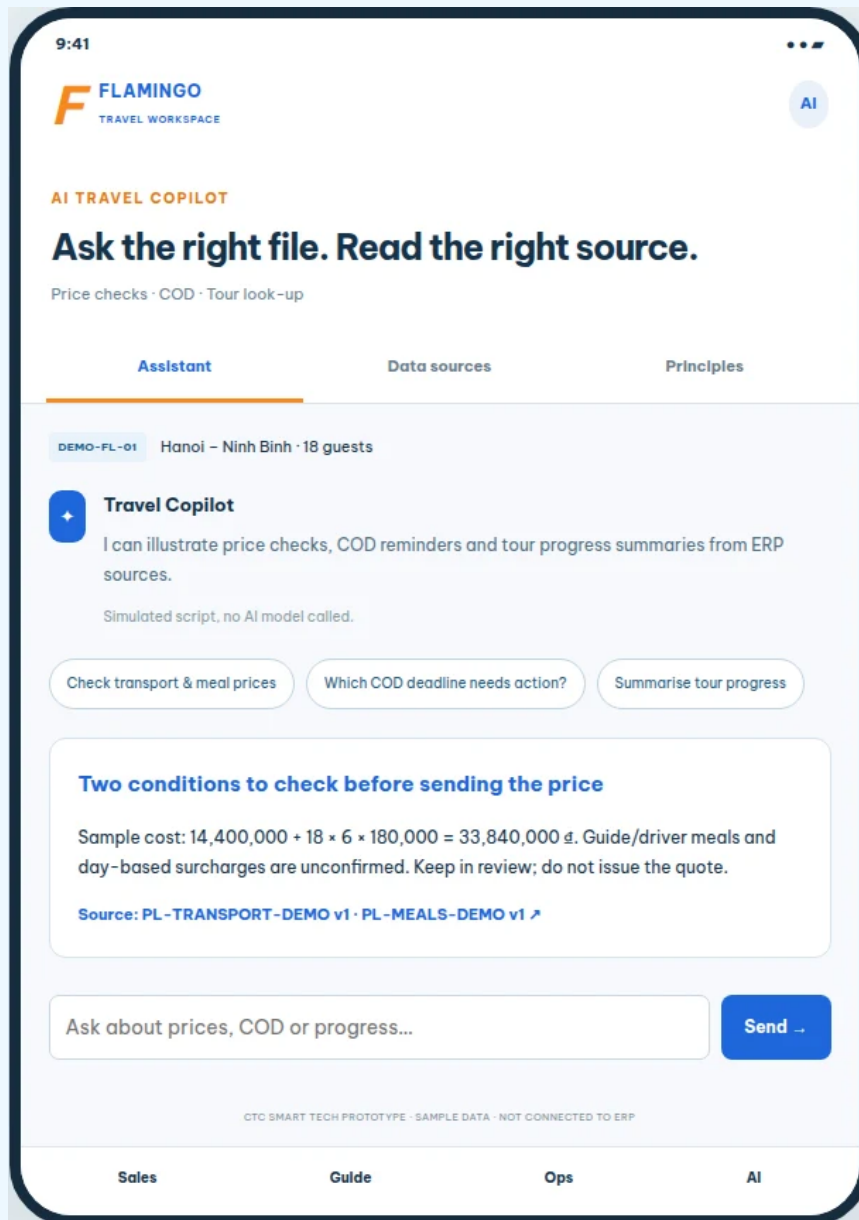


System screenshot · data redacted

Guide assignment & schedule

Owners and guides organised per tour; the base for pushing work schedules to the field app.

Source screen: </dashboard/ops/assignments> · record data redacted; click to enlarge.



Proposed prototype · no LLM connection

Sample scenario: compute costs, flag missing conditions, cite the versioned price list and keep quote sending with Sales.

Read price list →

Extract with sources →

Check rules →

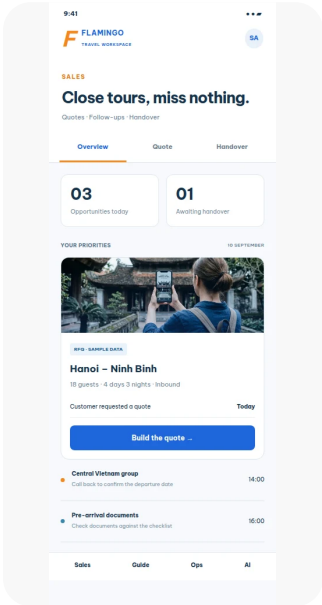
Owner approves →

Save to tour file

Same ERP.

Everyone sees exactly what to do.

We propose focused module apps on the same ERP APIs and tour codes. Each app has its own business scope, access rights and handover point; the desktop menu is not copied to the phone.



SALES
Close tours, miss nothing.
Quotes · Follow-ups · Handover

Overview Quote Handover

03 Opportunities today 01 Awaiting handover

YOUR PRIORITIES 10 SEPTEMBER

Hanoi - Ninh Binh
18 guests · 4 days 3 nights · Inbound
Customer requested a quote Today

Build the quote

Central Vietnam group
Get back to confirm the departure date 14:00

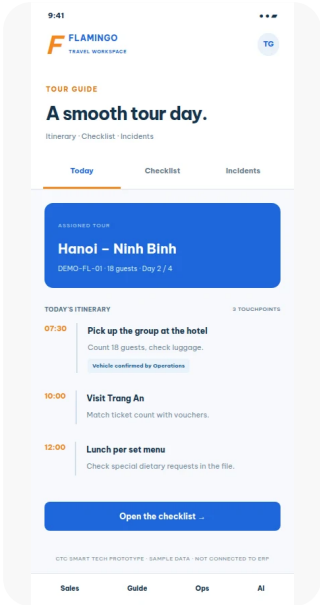
Pre-arrival documents
Check documents against the checklist 16:00

Sales Guide Ops AI

FROM OPPORTUNITY TO HANDOVER

Sales app

- Today's opportunities and follow-ups.
- Draft quotes with versions and service conditions.
- Closing checklist; Form 1 handover to Operations.



TOUR GUIDE
A smooth tour day.
Itinerary · Checklist · Incidents

Today Checklist Incidents

ASSIGNED TOUR
Hanoi - Ninh Binh
DEMO-FL-01 18 guests · Day 2 / 4

TODAY'S ITINERARY 3 TOUCHPOINTS

07:30 Pick up the group at the hotel
Count 18 guests, check luggage.
Vehicle confirmed by Operations

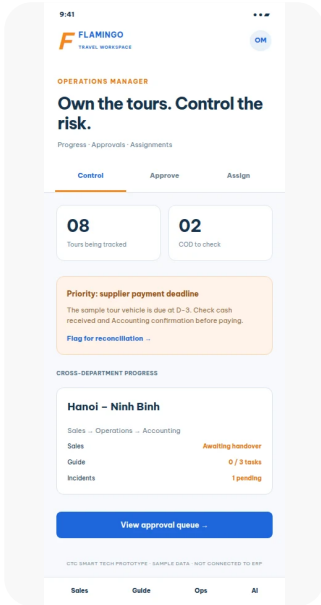
10:00 Visit Trang An
Match ticket count with vouchers.

12:00 Lunch per set menu
Check special dietary requests in the file.

Open the checklist

ETC SMART TOUR PROTOTYPE · SAMPLE DATA · NOT CONNECTED TO ERP

Sales Guide Ops AI



OPERATIONS MANAGER
Own the tours. Control the risk.
Progress · Approvals · Assignments

Control Approve Assign

08 Tours being tracked 02 COD to check

Priority: supplier payment deadline
The sample tour vehicle is due on D-3. Check cash received and Accounting confirmation before paying.
Flag for reconciliation

CROSS-DEPARTMENT PROGRESS

Hanoi - Ninh Binh
Sales · Operations · Accounting
Sales Awaiting handover
Guide 0 / 3 tasks
Incidents 1 pending

View approval queue

ETC SMART TOUR PROTOTYPE · SAMPLE DATA · NOT CONNECTED TO ERP

Sales Guide Ops AI

Module & permission mapping

ROLE	INHERITED ERP MODULE	PERMISSION BOUNDARY
Sales app	RFQ pipeline → Quote builder → Form 1 → Tour file	Sales view/edit their opportunities and prepare handover; they do not confirm cash received or approve spending.
Tour guide app	Assignments / guide schedule → Tour itinerary → Checklist → Incidents	Access only to assigned tours and customer-service data; no margins or company-wide settlements.
Operations manager app	Tour file → COD → Incident approval → Assignments	Approves within limits and scope; Accounting still confirms cash in/out and documents.

A sample flow you can try

Sales save a quote and complete the handover checklist → the guide records tasks / reports an incident → the manager reviews with a reason → status updates in the same demo browser. Production needs server-side permission checks, logs, conflict handling and cross-device sync.

Roadmap from the identified business processes

Data foundation

Standardise tour codes, supplier catalogue, price lists, permissions and rules.

Price-check pilot

Transport & meals: extract → check conditions → compute by rules → human approval.

ERP & sales channel

Persistent data; RFQ/B2C → Form 1 → operations → reconciliation.

Role-based apps

Permissioned APIs, push notifications and sync for Sales, guides and managers.

AI & multichannel

Sourced look-ups, reminders and controlled suggestions; measure quality before granting write access.

Acceptance criteria include: website intake lands in the right Sales queue; Form 1 is handed over only when complete; COD alerts on time; incidents reach the right approver; guides cannot read data outside assigned tours; actions and data versions are traceable.

Research sources: Flamingo web-app source code, workflow data extracted from the Sales-Operations-Account documentation, the AI Automation design and the POC proposal. This document describes the solution and does not publish contract prices or real customer data.