

Pesqa User Stories May 9, 2014

General Notes:

There are 2 stages of our project:

Stage One: Provider On-Boarding

We would like to be able to contact providers and ask them to create an account and list trips as a first stage. At this point, the functionality to sell trips to end users is not essential however all features to list a trip must be complete.

Stage Two: End User Sales

Approximately one month after the start of provider on-boarding, we would like to have the full site complete ready to sell the trips to the end user. This would mean all functions complete.

STAGE ONE

Sign in (provider and end user)

- If a user has successfully signed up previously they can log in to Pesqa
- All fields are mandatory
- A user is asked to fill in all mandatory fields, if any of them are left blank
- A user is asked to enter in an email address, which will be validated for presence.
- A user is asked to enter in a password, which will be validated for presence
- If a users password and email address do not match an existing account, the user is asked to re-enter both until they match an account
- A user can select 'remember me', if the user wants a cookie to be set to keep them logged in between sessions
- If a user signs in successfully, and their email and password are associated with a user (customer) account, the sign in modal will close and they will remain on the same page. After successful sign in, the user will be able to make a purchase by selecting 'book now' on the single trip page and no further account details will be required excluding payment details.
- If a user does not sign in and they select 'book now' on trip, they will be either asked to sign in or sign up prior to checkout
- If a user signs in successfully, and their account is associated with a provider account, the sign modal close and they will remain on the same page. After successful sign in the provider will be able create, edit and delete trips associated with their account. More details in tickets below.

Forgotten password

- If a user cannot remember their password, they can click on a "forgot password" link and be taken to an alternate view.
- The user is asked to enter their email address and hit submit.
- If the email matches a Pesqa user account, an email will be sent out. That email will contain a link which will allow the user to change their password.

- If the email is not a match for a Pesqa user, the user will be informed that its an invalid email account and asked to try again.

Terms and Conditions (static page)

- A link called "Terms and Conditions" will be located in the footer
- If a user selects this link, they will be directed to a static page with Pesqa's Terms and Conditions and Privacy and Cookies policy
- Pesqa must be able update copy as required
- A user (customer) can only view terms and conditions for customer and privacy policy.
- A provider, when creating an account, can select the link to read the terms and conditions for the provider

Video

- If a user clicks the video play button or 'learn how it works', the explainer video will be viewable in a modal
- The user can close the video by clicking the x in top corner or anywhere else on the page other than on the video itself and the video will stop playing and the user will return to the home page.
- The video will be available on the May 20, 2014, provided by Dustin Bankord.

List Your Trip

- List your Trip button is located in the header
- If a provider selects List Your Trip, they will be directed to the Why List page

Why List

- A link to "Why List" will be located in the footer.
- If a user selects "Why List", they will be directed to the pricing page and linked to an anchor tag for the "why list" section.
- On the pricing page, the user can enter the account creation modal by clicking on a "List Your Trip" button.
- If a provider selects 'Do you have any questions', they open an email pre filled to contact support@pesqa.com

Email Address and Password - Create Account modal

- A provider is asked to enter in their email, validated for presence and format
- A provider is asked to create a secure password, validated for presence
- A provider is asked to confirm their password, validated for presence and matching the original password field
- Provider and user uniqueness is based on both models, meaning that you cannot sign up as a provider with the same credentials that have already been used for a user and vice versa.

Business Name and contact name - Create Account Modal

- A provider is asked to enter their business name, validated for presence
- A provider is asked to enter the contact name, validate for presence

Provider Account reverse geocoding - Create Account Modal

- A provider is able to drop a pin on the map
- Please make sure this is not custom functionality!
- The longitude and latitude coordinates will be kept for future functionality
- A provider is able to search for their location by entering it into the search box above the map

Check boxes - Create Account modal

- Insurance: A provider is asked to tick the box to confirm that they have the appropriate insurance to sell their trips, validated for presence.
- Terms and conditions: A provider will be asked to tick the box to confirm they have read and agree to the terms and conditions of Pesqa, validated for presence.
- Terms and conditions: A provider has the option of clicking on the link next to the checkbox and viewing the provider T+ C's and privacy/cookie policy.

Cancel - Create Account modal

- A provider can select cancel at any point and no account details will be saved.

Stripe Connect - Create Account Modal

- A provider must select with Stripe Connect, which will be handled off our site, however they must successfully connect to continue with the account creation process.

General - Create Account modal

- All fields are mandatory and a provider may not create an account unless all fields are completed and validated.

Trip Name - Create New Trip

- A provider will be asked to enter the name of their trip, validated for presence

Price - Create New Trip

- A provider will be asked to enter the price of their trip, validated for presence

of spots - Create New Trip

- A provider will be asked to enter the total number of spots available on this trip, validated for presence and that there are at least 1 spot available.

Service Type - Create New Trip

- A provider will be asked to select from the drop down the service type for the trip, multiple options can be selected (Guide service, Lodge, Charter boat)

Species - Create New Trip

- A provider will be asked to select from the drop down the species targeted on the trip
- Multiple options can be selected.
- Pesqa needs the option to extend this list to cover more species in the future
- Salmon, Trout, Steelhead, Dolly Varden, Bull Trout, Chinook, Sockeye, Pink salmon, chum salmon, Atlantic salmon, Sturgeon, halibut, cod, bonefish, Tarpon, permit, Grand trevally, Marlin, Sailfish, snook, Redfish, Tuna, kingfish, Grouper, wahoo, snapper, Mahi Mahi, Amber jack, Bluefin tuna, mackerel, shark, Barracuda

Fishing type - Create New Trip

- A provider will be asked to select a fishing type from the drop down the fishing type, the options are: freshwater fishing, saltwater fishing, freshwater fly fishing, saltwater fly fishing
- Only one option can be chosen by a provider.
- The selections will be used to categorize the trip on the search criteria

Water Type - Create New Trip

- A provider will be asked to select from the drop down the water type, the options are: River, Lake, Ocean
- A single option only can be chosen by the provider.

Description of trip - Create New Trip

- The placeholder text in the description box will be linked to the service type(s) selected, if 2 or more service types have been selected prompts for both types will be offered e.g if I have selected lodge, guide, or charter the following prompts will be offered. The placeholder prompts will be as listed in description
 - Lodge
 - Trip Itinerary and Travel • Inclusions and exclusions • Equipment • Description of the trip, lodging and food
 - Guide
 - Description of the service - Itinerary and trip meeting place - Inclusions and exclusions
 - Equipment
 - Charter boat
 - Description of the service - Itinerary and trip meeting place - Inclusions and exclusions
 - Equipment

Provider video upload - Create New Trip

- A provider is able to input a link to a video for their trip which will be hosted on youtube

Trip date start and end dates - Create New Trip

- A provider will be asked to insert the start and end dates of the trip, validated for presence.
- A provider will be asked to input the start and end time of trip on a 12 hour clock, validated for presence

Repeat options for trip creation - Create New Trip

- A provider will be able to select whether the trip is repeated
- Repeat options will be: Never, twice daily, Daily, Weekly, Monthly on these specific dates, every X day of the week (every monday), every Xth, X day of the week (every other monday)
- A provider also must be able to select a date where repetition ends, or continues indefinitely.

Trip Geolocation - Create New Trip

- A provider is able to drop a pin on the map
- Please make sure this is not custom functionality!
- The longitude and latitude coordinates will be kept for future functionality
- A provider is able to search for their location by entering it into the search box above the map

Image upload - Create New Trip

- A provider can upload an image by selecting "add image", which will open a file finder
- Auto rescale will rescale the image to the pixel size required, web development team please choose this spec
- A provider can upload multiple images by selecting the 'add next media' button and an image finder will open again to add next image.
- There is a maximum number of 10 images per trip
- There is a minimum of 1, recommended 4 at least

Single Trip Page

- A user can select a trip to view the following data:
- A user can view the image gallery
- A user can view the video (if present)
- A user can read the trip description
- A user can view a booking calendar (separate ticket with all features)
- On a single trip page, a user will see a 'From Price'. This price is the lowest price available for the trip listed

Booking calendar - Single Trip Page

- On the calendar view, the user can see:
 - Trip dates, which are colour coded green if available
 - Total number of spots available per single trip unit, which will be updated each time a trip is booked or added
 - Price per trip, not per day
 - If there are no spots available on a given date, the user will only see the date and no price information
- Below the calendar view, a user will be asked to select the number of people in their party
- If a user increases or decreases the number of people in their party, this will update the subtotal accordingly.
- A user will be advised if there are insufficient spots available on the selected dates to fulfil their request
- Once a user has selected the dates and the number of people, they can view the subtotal for the trip.
- A user can select book now, which takes them to Stripe's checkout on Pesqa
- On the calendar view, if a date has no availability, a user will see a greyed out box, with only the date and no price or spots available information

Auto Emails

- A provider will receive an automatic email through Mandrill at the following points on the site:
 - If a provider selects 'Create Account' after entering data on the Create Account Modal, they will be sent a welcome email confirming successful registration to Pesqa.
 - If a provider selects 'Activate Listing' on the Create New Trip Modal, they will be sent an email confirming their listing details.
 - If a provider sends an email to support@pesqa.com at any point on the site, they will receive an automatic response thanking them for their email and confirming a response will be as soon as possible
 - If a provider selects 'forgot password' on the Sign In modal, the provider is asked to enter their email address and hit submit. If the email matches a Pesqa provider account, an email will be sent out containing a link which will allow the user to change their password.

A provider can

- Create, edit and cancel all trips linked to their account
- Delete account
- Update all account details which are captured on the create account model
- View customer details, who have purchased products linked to their account.

About Us (static page)

- A link to "About Us" will be located in the footer
- If a user selects About Us, they will be directed to a static Pesqa About Us Page
- Pesqa must be able to add to this copy

Initial Copy for About Us (Will be added to)

Founded in January 2014 and based in Smithers, BC, Pesqa is a marketplace for people to list, find and book fishing travel around the world - online, on tablet or mobile. Whether a charter for a day, 2 day guided float trip or all inclusive lodge for a week, Pesqa is your connection to worldwide fishing experiences.

Tel: 250 631 4520

Email: hello@pesqa.com

Live chat link

Pesqa Fishing Tourism Inc

PO Box 784

1428 Hwy 16

Telkwa, BC

V0J 2X0

Help (static page)

- A link to "help" will be located in the footer.
- If a user selects Help, they will be presented with Pesqa customer support details
- A user can see Pesqa's email address: support@pesqa.com
- A user can see Pesqa's telephone number: 250 631 4520
- A user can contact Pesqa via Olark Live Chat

STAGE TWO

Sign up (customer account creation)

- All fields are mandatory
- A user is asked to fill in all mandatory fields, if any of them are left blank
- A user is asked to enter in my email address, which will be validated for presence and format (xxx@xxx.xxx)
- A user is asked to create a secure password, validated for presence
- A user is asked to confirm my password, validated for presence
- A user is asked to re-enter my password if they do not match
- A user is asked to enter the following information in text fields, validated for presence:
 - 1) email address
- A user is asked to enter the following information in list select, validated for presence:
 - 1) Gender - male, female or other

- A user can exit the sign up modal without completing the required fields however an account will not be created
- If user chooses to exit the sign up modal and then wishes to purchase a trip, they will be presented with the same sign up modal prior to enabling the Stripe checkout
- Sign up modal wireframe and design not started. Wireframe to be supplied ASAP.
- After submitting a complete form, a generic welcome email is sent to the email address provided in the form. We would like an integration with Mandrill to handle all automatic email responses.
- Provider and user account uniqueness is based on both models, meaning that you cannot sign up as a provider with the same credentials that have already been used for a user and vice versa.

Like on Facebook

- The Facebook logo will be located in the footer
- If a user clicks on the Facebook logo, they will be directed to Pesqa's facebook page

Watch on Youtube

- The Youtube logo will be located in the footer
- If a user clicks on the Youtube logo, they will be directed to Pesqa's Youtube page

Follow on Twitter

- Twitter logo will be located in footer
- If a user clicks on the Twitter logo, they will be directed to Pesqa's twitter page

Ask Questions

An Ask Questions button will be located in the footer

If a user selects Ask Questions, the user will be directed to a pre filled addressed email to support@pesqa.com

Site Map

- Site Map will be located in the footer
- If a user selects Site Map, they will be directed to the Site Map.
- Site map is a simple page which contains a hierarchical map of all the content on the site, primarily for the purpose of search engines.

Ranking of Search Results - Search and Results page

- The search results will be displayed by "recently added" as the default sort for MVP
- A user will have the option of searching by multiple criteria. If they choose more search terms to complete, the more refined the search results will be and visa versa

Dates - Search and Results page

- A user can search by start date and end date
- If a user chooses to search by date a calendar popup will be offered to help them select the start and end dates.

Fishing type - Search and Results page

- A user can search by fishing type
- The fishing type options a user can search by are: freshwater fishing, saltwater fishing, freshwater fly fishing, saltwater fly fishing
- If a user selects a fishing type to search by, they will be shown all options which are categorized as by that fishing type by the provider on create new trip, under box titled 'fishing type'.
- If a user chooses not to search by fishing type, all fishing type options will be displayed

Results of search - Search and Results page

- If a user selects search, the user will be shown the results of their search filter selections below the search filters
- The results will be the trips related to their search fields selections
- The number next to 'see all' will be updated as the number of search results changes.
- The results will be displayed with the following information:
 - image
 - trip name
 - dates
 - price

Pesqa staff can

- View all orders linked to customer and provider details
- Add, edit and remove anything on the site
- View all customers contact details, which are automatically saved when an account is created
- View all provider contact details, which are automatically saved when their account is created

Payment Dates

- Payment details will be handled by Stripe however we require your team to set up the code.
- Upon making the reservation, all prices are final and the following payment dates must be adhered to by the customers:
 - If a trip is purchased in excess of 365 days before departure:
 - 20% of total trip price will be required as a non-refundable deposit at time of purchase

- A further 30% of total trip price will be required as a non-refundable deposit 365 days prior to departure
- 50% of total trip price will be required 90 days before departure
- If a trip is purchased between 364 and 90 days before departure:
 - 50% non-refundable deposit is due at time of purchase
 - 50% of total trip price will be required 90 days before departure
- If a trip is purchased less than 89 days before departure:
 - Full trip price is required at time of purchase

GST/HST (Tax) that Pesqa must pay on provider commissions

- We have to charge providers who supply services in Canada GST/HST (tax) on our Pesqa commission.
- The rate of tax will depend on the address of the provider, or the location that the supplier provides the services, as per the tax rates below.

Alberta - 5%

BC - 5%

Manitoba - 5%

New Brunswick - 13%

Newfoundland and Labrador - 13%

Northwest Territories - 5%

Nova Scotia - 15% (1)

Nunavut - 5%

Ontario - 13%

Prince Edward Island - 14% (2)

Saskatchewan - 5%

Yukon - 5%

The HST breakdown:

- The HST rate of 12% includes the 5% federal part and 7% provincial part.
- The HST rate of 13% includes the 5% federal part and 8% provincial part.
- 2) The HST rate of 14% includes the 5% federal part and 9% provincial part.
(As of April 1, 2013)
- 1) The HST rate of 15% includes the 5% federal part and 10% provincial part.
(As of July 1, 2010)
- The HST rate of 14% includes the 6% federal part and 8% provincial part.
- The HST rate of 15% includes the 7% federal part and 8% provincial part.

Currency

- All of our prices will be displayed and repaid in the currency selected by the provider on their Stripe account

Stripe and Payments

- Customers can pay on our site, using a card accepted by Stripe, they will not leave our site.
- When a customer makes a booking on our site, the following payments will be made to Pesqa and the providers:
 - Providers will pay Pesqa a 10% + \$0.30 (plus GST if applicable, outlined above) cent fee on every successful booking
 - 10% commission = 10% of the trip price listed by the provider on the create trip modal, before the additional fee is charged to customers (outlined below)
 - Additional customer charge: Pesqa will also apply a 3% fee to the trip price listed on the create trip modal. This charge will be included in the total price seen by the customer, however our commission is calculated before the addition of the customer charge
 - Pesqa will take the commission out of the initial customer payment, and all remaining payments will be sent directly to the provider
 - Providers located in Canada must also pay GST on their commission, please see rules under GST/HST section
 - All these terms can be handled within Stripe Connect however we require developer time to set this up correctly

Tax Payable by User

- We need a method for the site to calculate the amount of tax the customer must pay on checkout
- We are researching options such as Avalara, and will update this as soon as we have decided
- If you have suggestions, please advise.

Auto Emails

- A user will receive an automatic email through Mandrill at the following points on the site:
 - If a user successfully signs up to Pesqa, by completing all fields in the Sign Up modal, they will be sent a email confirmation.
 - If a user sends an email to support@pesqa.com at any point on the site, they will receive an automatic response thanking them for their email and confirming a response will be as soon as possible
 - If a user selects 'forgot password' on the Sign In modal, the user is asked to enter their email address and hit submit. If the email matches a Pesqa user account, an email will be sent out containing a link which will allow the user to change their password.