Reading guide

Heco Portal – MVP Document Reading Guide (for Developers)

This document describes the **functional and operational logic** of the Heco Portal MVP.
It is intentionally detailed and structured by user roles and workflows.

This short guide explains **how to navigate the document** and **where to focus first**.

---

1. What the Platform Is (Big Picture)

The Heco Portal MVP is built around **three core layers**:

1. **Traveller-facing homepage powered by AI**
2. **Heco Core Team (HCT) dashboard**
3. **Trip Manager (operational core)**

All traveller interactions ultimately feed into **HCT-controlled workflows**.

---

2. Platform Users (Who Does What)

The document explains the following user types:

- **Travellers**
  → explore, build trips, interact with AI
- **Heco Core Team (HCT)**
  → supervises AI, validates trips, tracks payments, manages providers and content
- **Service Providers (SPs)**
  → HRPs, HLHs, and OSPs, who deliver trips on the ground

If you want to understand **roles and permissions**, start with:

- Sections **3–4** (Core concepts & users)

---

3. Traveller Entry & Homepage (AI Layer)

The **homepage** is the main traveller interface and is AI-powered.

Key elements:

- Landing page (intent detection)
- Homepage tabs:
    - Discover
    - Your Journey (trip planner)
    - Impact

Travellers:

- never enter full trip details upfront
- interact through **signals**, not rigid forms
- can always ask the AI to adjust their trip

If you want to understand **AI behaviour and traveller UX**, read:

- Sections **5–7**
- Especially **Your Journey** (Selected Experiences, Timeline Itinerary)

---

4. How Traveller Data Is Used

Everything collected on the homepage:

- preferences
- itinerary drafts
- questions
- support requests

is later:

- **visible**
- **editable**
- **validated**

by the **Heco Core Team**.

Nothing is finalized without human oversight in the MVP.

---

5. HCT Dashboard (Operational Control)

The **HCT Dashboard** is where the platform becomes operational.

It includes:

- Admin tab (system configuration)
- Control Panel (AI supervision & traveller support)
- Leads
- Trips
- Calendar
- Payments
- Providers

- Travelers
- Provider Applications

If you want to understand **how humans control the system**, go directly to:

- Section **12 – HCT Dashboard**

---

6. Trip Manager (Most Important Section)

The **Trip Manager** is the **single source of truth** for trips.

It is where HCT:

- reviews itineraries
- edits services
- tracks payments
- confirms trips
- manages operational reality

If you read **only one section in depth**, read:

- **Trip Manager** sections

Everything else ultimately connects to it.

---

7. Content & Provider Management

The document also explains:

- Experience management

- Regenerative Project management
- Service Provider applications and approval

These sections are useful for:

- understanding data models
- knowing what content is dynamic vs static

Relevant sections:

- **15 – Experience Management**
- **16 – Regenerative Project Management**
- **17 – SP Application Page**

---

8. How to Read the Document Efficiently

Recommended reading order for developers:

1. This guide
2. Core concepts & users
3. Homepage + AI logic
4. HCT Dashboard overview
5. **Trip Manager (deep read)**
6. Payments (conceptual + operational)
7. Experience / RP / Provider management

---

9. Key MVP Principles to Keep in Mind

- MVP is **human-governed**
- AI **assists**, it does not decide alone
- Payments happen **outside the platform**
- Flexibility is preferred over automation
- Phase 2 is intentionally out of scope

MVP

1. Purpose, Scope, and Nature of This Document

1.1 Purpose

This document describes the **functional logic, user flows, and operational behaviour** of the Heco Portal MVP.

It is written to:

- Provide a **shared understanding** between product owner (Heco) and developers
- Explain **how the system is expected to behave**, not how it must be coded
- Serve as a **reference narrative** during development and iteration

This document intentionally focuses on:

- User journeys
- System reactions
- Data responsibilities
- Human–AI collaboration

1.2 What This Document Is *Not*

This document is **not**:

- A frozen UI design
- A final UX specification
- A database schema

- A technical architecture document

UI, UX, and technical implementation choices are **open to discussion and iteration**, as long as they respect the logic and flows described here.

1.3 MVP vs Long-Term Vision

From the beginning, the Heco Portal is designed as a **scalable system**, but development is consciously split into phases.

- **MVP**
    - Prioritizes usability, operational feasibility, and learning
    - Accepts manual steps where automation is not yet viable
    - Relies on the Heco Core Team (HCT) as a bridge between AI and reality
- **Phase 2 (Fully-fledged system)**
    - Introduces deeper automation
    - Enables direct AI ↔ service provider communication
    - Reduces manual workload for the HCT
    - Supports national and international scaling

Throughout this document, features or behaviours that belong to **Phase 2 only** are explicitly mentioned as such.

---

2. Core Product Vision (User-Centric)

2.1 Who the Platform Is For

The Heco Portal is designed for travellers who:

- Are interested in **less crowded, authentic, place-based experiences**
- Are curious but may lack local knowledge
- Value **meaningful travel**, human connection, and ecological impact

They are not necessarily expert travellers, but they are:

- Open to discovery
- Willing to trust guidance
- Interested in understanding *why* a trip is designed in a certain way

---

2.2 Two Dominant Traveller Behaviours

The platform must support **two distinct but overlapping behaviours**, without forcing the user into one mode.

A. AI-led travellers

These users:

- Want the system to propose a coherent itinerary quickly
- Prefer answering questions rather than browsing extensively
- Expect the AI to “take responsibility” for the structure of the trip

For them, the AI behaves like:

> A travel designer that asks the right questions and proposes solutions.

B. Explorative travellers

These users:

- Enjoy browsing regions and experiences
- Want to understand options before committing
- Prefer incremental decisions

For them, the AI behaves like:

> A guide that stays in the background and supports exploration.

2.3 Design Consequence

The platform must:

- Allow **seamless switching** between exploration and AI guidance
- Never lock the user into a single mode
- Treat both behaviours as valid and equal

This duality directly influences:

- Landing page logic
- Homepage behaviour
- Chatbot behaviour
- Itinerary construction

---

3. User Types, Roles, and Access Logic (MVP)

3.1 Overview of User Types

The platform supports multiple user types from the MVP stage onward, primarily to:

- Populate real operational data
- Test end-to-end flows
- Avoid building a “traveller-only” system disconnected from reality

User types:

1. Travellers
2. Heco Core Team (HCT)
    - Admin
    - Collaborator
3. Heco Regional Partners (HRP)
4. Heco Local Hosts (HLH)
5. Other Service Providers (OSP)
6. Local Associations (LAs) in Phase 2 only

Each user type:

- Has a **unique user ID**
- Is associated with a **role**
- Has access to a **role-based dashboard**

3.2 Travellers

Travellers:

- Design trips
- Interact with the AI
- Request human support when needed
- Make payments
- Generate impact through their trips

A traveller may have:

- Zero, one, or multiple trips
- Trips in different statuses (Not confirmed / Confirmed / Running / Completed / Cancelled)

3.3 Heco Core Team (HCT)

HCT users are the **operational backbone** of the system.

They:

- Supervise AI-generated itineraries
- Intervene when data is missing
- Manage trips, payments, and SPs

HCT roles:

- **Admin**: system configuration and governance
- **Collaborator**: full operational access without system-level configuration rights

The HCT is intentionally present in the MVP as a **human stabilizer** of the system.

3.4 HRPs, HLHs, and OSPs (all referred as SPs)

These users represent **local service providers**, with different scopes:

- **HRP (Heco Regional Partner)**: regional coordination, oversight, and ownership
- **HLH (Heco Local Host)**: provide experiences and local hosting
- **OSP (Other Service Provider)**: transport, activities, guides, or other services

From the MVP:

- They can register and be approved
- Their data (entered by the HCT in the MVP) feeds the trip and pricing logic
- They are linked to trips, regions, and payments

Direct AI ↔ provider communication belongs to **Phase 2**, not the MVP.

3.5 User Identity and Data Relationships

At a conceptual level:

- A traveller is linked to trips
- Trips are linked to experiences
- Experiences are linked to regions and providers
- Providers are linked to payments
- Trips generate financial and impact data

These relationships are fundamental and must be preserved across all phases.

---

4. Core AI & Algorithm Logic (Conceptual)

This section explains **how the system reasons**, independently of UI.

4.1 Experiences as Building Blocks

An **experience** is the smallest curated unit of travel.

In the MVP:

- Experiences are **created and maintained by the HCT**
- The AI does **not create experiences** with the HLH (this will be for the phase 2)
- Experiences are reusable across multiple trips

Each experience includes:

- A region
- One or more activities (optional when the experience is a stay)
- A defined duration (number of days / hours, start time, end time)
- Included services (stay, guide, transport)
- Constraints:
    - Seasonality
    - Difficulty
    - Minimum / maximum number of participants
    - Age or physical restrictions
- An itinerary when relevant (like for a trek)
- A base cost structure

Note:

- Experiences can last several days, but their duration can also be as short as one hour.
- The duration and time restriction of an experience is a crucial data for the AI, the traveler or HCT user to build itineraries without conflict during operations

Experiences are **structurally stable**, even if details evolve.

4.2 Trip as a Dynamic Composition

A **trip** is a dynamic composition of:

- Experiences
- Connecting services (transport, accommodation, meals, guides)
- Traveller preferences
- Dates and group size

The AI's role is to:

- Organize selected experiences logically
- Fill the gaps between them
- Ensure feasibility and coherence

The user (traveller or HCT) always retains the ability to modify the result.

4.3 Chronology and Feasibility Logic

When experiences are added to a trip, the AI evaluates:

- Order and chronology
- Travel distances

- End time of experience A
- Start time of experience B

If direct travel is not feasible, the AI:

- Adds intermediate stays
- Suggests optional activities
- Or leaves time intentionally free

The same logic applies:

- Before the first experience
- Between experiences
- After the last experience

4.4 Pricing Logic

Pricing is **incremental and transparent**.

It is composed of:

- Fixed experience costs
- Variable service costs:
    - Accommodation (by category and occupancy)
    - Transport (by distance and vehicle type)
    - Guides
    - Other services

Pricing updates automatically when:

- Experiences are added or removed
- Dates or group size change
- Services are modified by traveler, AI or HCT

Margins (RP, HRP, HCT) are also applied.

4.5 AI Limitations and Human Intervention (MVP)

In the MVP:

- The AI may encounter missing or uncertain data
- The AI explicitly identifies what it cannot resolve
- The AI requests human input via the HCT Control Panel

The HCT then:

- Collects the missing data manually
- Feeds it back into the system
- Allows the AI to continue its work with the traveler

This behaviour is **intentional** and prepares the system for Phase 2 automation.

5. Traveller Entry & Orientation Flow

5.1 Sign-up / Log-in Logic

General Principle

During the **MVP phase**, access to the platform is restricted to **signed-in users**.

This ensures that:

- trips can be saved automatically,
- traveller actions can be linked to a unique user,
- support and follow-up remain consistent.

First Visit and Authentication Prompt

- When a visitor accesses the platform for the first time, or
- when the system does not recognize an active session,

a **Sign-up / Log-in pop-up** is displayed.

The visitor must either:

- log in to an existing account, or
- create a new account

before continuing.

Sign-up Process

During sign-up, the user is asked to provide:

- **Name**
- **Email address**
- **Create their password**

They are also invited to:

- opt in or out of the **newsletter subscription**

- opt in or out of receiving an email notification when the **Heco portal becomes fully fledged**

Both options are **optional** and can be updated later.

Trip Persistence and User Linking

Once signed in:

- any trip the user starts building is **automatically saved**
- the trip is **linked to the corresponding traveller account**

This allows travellers to:

- leave the platform at any time
- resume trip building later from their account

Post-Login Behaviour

After successful log-in or sign-up:

- the traveller is redirected to the **landing page**
- from where they can start or continue building their trip

5.2 Landing Page – Intent Detection

The **Landing Page** is the traveller's first interaction point after log-in.

It functions as an **entry filter**, not as a marketing-heavy page.

Its role is to:

- capture **high-level intent**
- reduce **friction**
- adapt the behaviour of the **homepage and AI**

The landing page does **not** attempt to collect complete trip details.

Resume Previous Trip (When Applicable)

If the traveller has at least one **saved trip**:

- the landing page displays a **clear invitation** to resume their most recent trip
- the invitation allows the traveller to:
    - resume trip building immediately, or
    - ignore it and start a new exploration

If no saved trip exists:

- the landing page behaves as a standard first-entry experience

This mechanism ensures continuity without forcing the traveller into a predefined path.

5.3 Information Collected from the Landing Page

Signals, Not Commitments

The landing page collects **soft signals** to guide the system's behaviour.

Expected signals include:

- **Region(s) of interest**
    - Explicit (e.g. *Tirthan Valley, Lahaul*)

    - Implicit (e.g. *mountains, beach*)
    - State-based (e.g. *Jharkhand, Uttarakhand*)
- **Travel style**
    - nature
    - culture
    - trekking
    - comfort level
    - etc.
- **Approximate timing**
    - dates
    - month
    - or season
- **Desired level of involvement**
    - *“Plan it for me”*
    - *“Let me explore”*

Nature of the Inputs

All inputs collected on the landing page are:

- **optional**
- **editable later**
- stored as **preferences**, not hard constraints

They are used to orient the system, not to lock decisions.

5.4 Behavioural Consequences

Based on the signals collected, the system adapts:

- which **region** the map focuses on
- how **experiences are ranked**
- whether:
    - a **draft itinerary** is auto-generated, or
    - the traveller starts with a **blank journey**

This ensures that the traveller feels:

- **guided, but not constrained**
- **free, but not lost**

---

6. Homepage – AI Workspace (Traveller View)

The homepage is the **core working space** for travellers.

It is designed as:

> A single, continuous interaction environment where exploration, AI guidance, and itinerary building coexist.

There are **no disruptive page changes** during trip design.

6.1 Main Components

The homepage consists of:

1. An AI chatbot
2. Three main tabs:
    a. Discover regions & experiences
        - With an interactive map
        - And a list of experiences
    b. Your Journey
    c. Your Impact

All components are **interconnected and reactive**.

6.2 AI Chatbot – Role and Behaviour

The AI chatbot is **always present**, but not intrusive.

It serves three roles:

1. Conversational guide
2. Memory keeper (preferences, decisions)
3. Orchestrator of itinerary logic

6.3 Modes of Interaction

The traveller can:

1. Ask direct questions to the AI
2. Let the AI ask clarifying questions
3. Ignore the AI and explore freely

The system never forces a single mode.

6.4 AI Memory and Autofill

During interactions, the AI captures:

- Group size
- Travel dates
- Accommodation preferences
- Transport comfort
- Budget sensitivity
- Pace and difficulty tolerance

This data:

- Automatically fills the Travel Preferences in **Your Journey** tab
- Updates pricing and feasibility
- Can be overridden manually at any time

6.5 Requesting Human Support

A **“Request support”** button is available but visually secondary.

When clicked:

- The traveller can write a free-text message
- The request is routed to the HCT Control Panel
- The AI pauses autonomous decision-making

From this point:

- The HCT may take partial/manual control of the trip design
- Or feed missing data back to the AI. The HCT member may help the AI understand the purpose of adding the data by mentioning the related Traveller ID or Trip ID.

This ensures:

- Continuity
- Trust
- No dead ends for the traveller

---

7. Discover, Journey, and Impact Tabs (Traveller)

This section describes **what each tab does**, not how it looks.

7.1 Discover Regions & Experiences (Tab 1)

Purpose

The Discover tab is designed for:

- Exploration
- Inspiration
- Understanding what is possible

It is intentionally **non-committal**.

7.1.1 Map Behaviour

- The map highlights **only regions where Heco operates**
- Non-operational regions appear muted
- Zooming into a region:
    - Reveals experiences as icons
    - Displays the region name (when clicked, the name linked to the landing page of that particular region in the “classic” website in another window / tab.
    - Allows navigation to region-specific content

7.1.2 Experience Cards

Experience cards:

- Represent curated, predefined experiences
- Are ordered dynamically (popularity, relevance, filters)

Hover behaviour:

- Hovering a card highlights it on the map
- Hovering a map icon highlights the card

Click behaviour:

- Opens the experience in a new page / browser tab
- Preserves context and map position of the homepage

7.1.3 Filters

Filters open in a pop-up and may include:

- Experience type
- Season or dates
- Duration
- Difficulty
- Impact-related tags

Filters:

- Affect both the map and the list
- Never remove the user's ability to undo or reset

7.1.4 Interaction with the Journey

Each experience card includes:

- ❤️ Mark as preferred (non-binding)
- ➕ Add to journey (binding)

Additionally:

- Experiences can be dragged directly into the **Your Journey** tab

This is often the **first concrete step** toward trip creation.

7.2 Your Journey – Itinerary Builder (Tab 2)

Purpose

The Journey tab is where:

- Intent becomes structure
- Exploration becomes a trip
- AI logic becomes visible

Structure

The tab is divided into three conceptual columns:

1. Selected experiences
2. Timeline itinerary
3. Group details, travel preferences, and pricing

These columns update **in real time**.

7.2.1 Left Column — Selected Experiences

Purpose

The **Selected Experiences** column provides the traveller with a **clear overview of all experiences currently included in the trip**.

Content and Structure

At the top of the column, the **Trip ID** is displayed, followed by a **“Save this trip”** button.

The trip is **automatically saved at all times**.
The purpose of the **“Save this trip”** button is to allow the traveller to **assign a name** to the trip.

Once a name is assigned:

- the trip name is displayed at the top of the column

- followed by the Trip ID

All subsequent changes to the trip are **saved automatically**.
Travellers can log out at any time and **resume trip building** at their next login by accessing their saved trips via the **“Your itineraries”** menu item.

This left column lists:

- **All experiences added to the trip**
- Each experience displayed as a **card**

Each experience card includes:

- Experience name
- Key summary information
- A control to **remove the experience** from the trip

Interaction Behaviour

Clicking an Experience Card

- Opens the **experience detail view** as a pop-up
- Allows the traveller to review:
    - description
    - inclusions
    - duration
    - constraints
- **Does not remove** the experience from the journey

Relationship with the Timeline Itinerary

- Each selected experience (added from the **Discover Regions & Experiences** tab):
    - is automatically inserted by the AI into the **Timeline Itinerary**
- Travellers can then:
    - manually reorder experiences by **dragging them within the timeline**
    - ask the AI, via the chatbot, to reorganize the itinerary

The timeline remains the **authoritative representation** of how experiences are scheduled.

Adding New Experiences

To add an experience:

- The traveller must return to the **Discover Regions & Experiences** tab
- Browse or search for experiences
- Add the selected experience from that tab

Experiences cannot be added directly from the Selected Experiences column.

Key Principle

The Selected Experiences column:

- reflects **what** is included in the trip
- while the Timeline Itinerary defines **when and how** experiences occur

---

7.2.2 Center column - Timeline Itinerary

Purpose

The **Timeline Itinerary** is the **authoritative representation of the trip** for the traveller.

It shows how experiences and services are distributed **day by day**, and reflects all feasibility, timing, and inclusion logic handled by the AI.

Day Structure

Each day in the trip:

- Appears as a **distinct day block** in the timeline
- Can be **expanded or collapsed**
- Displays:
    - Activities
    - Transfers
    - Accommodation
    - Key timings (duration, start time, time restrictions)

Multi-day experiences Visual Logic

- When an experience runs over **several consecutive days**:
    - Those days are **visually grouped**
    - Experience days are **colored differently** from non-experience days
- This distinction allows travellers to immediately understand:
    - which days are structured and fixed
    - which days remain flexible

Full-Day Experiences (Without Accommodation)

When an experience:

- lasts a full day but does **not** include accommodation

The AI automatically:

- suggests accommodation **the night before** the experience
- suggests accommodation **the night after** the experience
- suggests the necessary transport:
    - to reach the experience
    - and to return afterward

These suggestions appear directly in the timeline and can be discussed or adjusted.

Partial-Day (Short) Experiences

When an experience lasts **less than a full day**:

- The AI suggests a **starting time** based on:
    - travel time
    - other activities already planned that day
    - known time restrictions
- Multiple short experiences can be placed **within the same day**

Visual behaviour:

- Short experiences appear as **smaller blocks** inside the day block

Travellers can:

- ask the AI to adjust starting times
- request rescheduling, provided no timing constraints are violated

---

AI Gap Filling (Automatic Behaviour)

To ensure itinerary coherence, the AI automatically:

- inserts **transport** between days and experiences
- adds **accommodation** where overnight stays are required
- suggests **meals** and **guides** when relevant

If uncertainty exists:

- the AI asks **clarifying questions** directly to the traveller, or
- flags the issue to the **HCT** for later resolution (when required)

This ensures continuity without blocking the trip-building process.

Manual Adjustments by Travellers

Travellers can manually:

- add days between existing days
- remove days
- reorder, remove, or add experiences

When such changes occur:

- the AI reacts **immediately**
- rearranges accommodation, transport, and other services accordingly
- involves the relevant **HLHs and OSPs** implicitly through service logic
- or suggests a **better overall arrangement** if the manual change creates inefficiencies or conflicts

The traveller always retains the final decision if no constraining conflicts.

Inclusions & Visual Indicators

Each day displays a set of **icons** indicating included or non-included services:

- Accommodation
- Meals
- Transport
- Guide

Color coding:

- **Green** → Included
- **Red or greyish** → Not included

This visual system makes trade-offs immediately visible, without requiring long explanations.

Key Principle

The Timeline Itinerary:

- makes **time, structure, and inclusions explicit**
- balances traveller freedom with AI coherence
- acts as the shared reference for both traveller and HCT views of the trip

---

7.2.3 Right column - Group Details, Travel Preferences, and Pricing

Purpose

This column centralizes **everything that influences feasibility and price**.

Group Details

Includes:

- Number of adults
- Number of children
- Number of infants

Changes here:

- Trigger feasibility checks
- Trigger price recalculation

Travel Preferences

Examples:

- Accommodation comfort level
- Vehicle comfort
- Guide preference
- Pace of travel

These preferences:

- Influence AI choices
- Can override defaults
- Are stored for future trips (important!)

Pricing Behaviour

Pricing:

- Updates dynamically
- Reflects:
    - Experiences
    - Added services
    - Group size
    - Preferences

The traveller sees:

- A transparent price evolution
- Not a “black box” final amount

Final confirmation and payment logic comes later, via the Trip Manager.

Booking right from the platform with a “Book your trip” button is for phase 2.

7.4 Your Impact (Tab 3)

Purpose

This tab makes **impact visible while designing the trip**, not after.

7.4.1 Impact Logic

General Principle

The **Impact** section translates the financial contribution of a trip into **concrete, place-based regenerative outcomes**.

Impact is always:

- **region-linked**
- **project-based**
- **derived from actual trip data**

Regional Impact Cards

For each region involved in the trip:

- A corresponding **Regenerative Project (RP) card** is displayed.

If a trip spans multiple regions:

- **Multiple RP cards** are shown, one per region.

Each RP card represents the regenerative project through which the trip's impact is realized.

Impact Calculation Logic

- A defined portion of the **trip's financial value** is allocated to regenerative action.
- This amount is converted into **physical impact indicators**, such as:
    - number of trees planted

    - surface area of forest protected from fire
    - estimated atmospheric carbon sequestered
    - or other region-specific metrics

The impact shown is therefore:

- tangible
- measurable
- directly linked to the trip

Regions Without an Active Regenerative Project

If a region involved in the trip **does not yet have an active Regenerative Project**:

- That region is **temporarily linked** to another region that does have an RP.
- The impact is then calculated using the **RP of the linked region**.
- In this case:
    - the **linked region's RP card** is displayed
    - the impact is clearly attributed to that project

This mechanism ensures that:

- every trip generates visible regenerative impact
- impact is never simulated without a real project behind it

7.4.2 Interaction

Each RP card:

- Is clickable
- Opens a pop-up with:
    - Project description
    - Type of impact

7.4.3 MVP Scope

In the MVP:

- The Impact tab reflects **only the current trip**

In Phase 2:

- This tab links to a **full Impact Dashboard**
- Showing historical trips and cumulative impact

---

8. Service Providers (SPs): HRPs, HLHs, and OSPs

8.1 Purpose

Service providers (SPs) are the **execution layer** of the portal. Their data (filled in by HCT in the MVP) must support:

- Experience definition (what is possible and when)
- Trip feasibility (availability, distance, constraints)
- Pricing accuracy
- Payment tracking and reconciliation

In the MVP, SPs mainly contribute by signing up and sharing basic information via the platform. Most of the data is collected and entered by the HCT. Direct provider–AI interaction is Phase 2.

8.2 Provider Types and Responsibilities

8.2.1 Heco Regional Partners (HRP)

HRPs are linked to:

- One region
- A set of HLHs and OSPs operating in that region
- Trips that include their region

HRP-related usage in MVP:

- Assigned to trips (Trip Manager: Regions + HRPs)
- Visible in cost/margin structure (Trip Manager financial snapshot)
- Used for operational coordination (still manual)

Phase 2 direction:

- HRP becomes an active operational user by viewing selected data in the Trip manager, feeding data to AI and receiving AI requests.

8.2.2 Heco Local Hosts (HLH)

HLHs provide experiences and other hosting services.

HLH data matters for:

- Experience feasibility (where the experience happens and when it can be operated)
- Gap-filling logic (stays / logistics inserted between experiences)

- Pricing (structured around the services provided)

Typical HLH pricing structure captures:

- Nature of the experience and its costs that may include :
    - Activities
    - Guide
    - Stay
    - Transportation

8.2.3 Other Service Providers (OSP)

Other Service Providers (OSPs) are service providers who contribute to the operational delivery of Heco trips but are **not directly linked** to a Local Association (LA) or to the Regenerative Project (RP) of their region.

OSPs are included because:

- not all operational services can realistically be delivered by locally embedded actors, and
- certain services (e.g. transport, logistics, technical support) may require external or specialized providers.

While OSPs support trip operations, they are **not structurally linked** to Heco's regenerative impact mechanisms. Their role is to **complement**, not replace, locally anchored service providers.

Their services may cover:

- Accommodations
- Transport providers
- Activity providers
- Guides
- Other logistical services

OSP pricing structures:

- Stay: single, double, triple - meal plans
- Transport: cost per km per vehicle type (and optionally driver allowance rules later)
- Activities: per person / per group / per day (depends on activity type)
- Guides: per day (optionally by difficulty category later)

8.3 SPs Registration and Validation (MVP)

8.3.1 Registration (Application)

In MVP, HRP/HLH/OSP can submit an application including:

Common fields:

- Full name
- Email
- Phone 1 / Phone 2
- Region (from HCT-maintained list)
- Address
- Bank details (Bank name, IFSC, Account name, Account number)
- UPI
- Notes

Service-specific fields:

- Type of services (from list)
- Accommodation categories (from a list)

- Vehicle types (if transport)
- Activity types

8.3.2 Approval and Activation

Service Provider Applications

All Service Provider (SP) applications appear in the **Provider Applications** tab of the **HCT Dashboard**.

HCT Actions (MVP)

For each application, the Heco Core Team (HCT) can:

- **Approve**
    - The provider becomes **active**
    - The provider becomes **selectable** in operational workflows
- **Reject**
    - The provider does **not** appear in any operational lists
- **Request clarification**
    - Additional information is requested via **outside-platform communication** (email, phone, WhatsApp, etc., in the MVP)

Effects of Approval

Once approved, the Service Provider becomes available for:

- **Experience creation and editing**
    - Created and managed by HCT in the MVP

- **Service cost definition** (entered and maintained by HCT in the MVP), including:
    - Accommodation (by category)
    - Transport (by vehicle type and per km)
    - Wages / daily rates
    - Other relevant service costs
- **Operational use in trips**
    - SPs may be called upon:
        - by **HLHs**, when involved in experiences
        - or by **HRPs**, for services outside experiences
    - Provider selection and use are **not** the responsibility of HCT
- **Payment tracking**
    - Payments to the SP are tracked by HCT through the Payments workflow

---

Key Principle

- **HCT approves and enables providers**
- **HLHs and HRPs decide when and how providers are used operationally**
- **HCT tracks payments and maintains system consistency**

---

9. Payments and Financial Tracking (Traveller + SPs)

9.1 MVP Principle

In the MVP:

- **All payments occur outside the platform**
  (bank transfer, UPI, cash, Remitly, etc.)
- The platform's role is limited to:
    - **tracking**
    - **reconciliation**
    - **operational visibility**

The system supports:

- partial payments
- advances to Service Providers
- final settlements
- manual corrections with notes (to reflect real field conditions)

Detailed operational behaviour is defined in the **HCT Dashboard** and **Trip Manager** sections.

9.2 Traveller Payments (Client Side)

- Traveller payments are **recorded manually by HCT**
- When the first payment is recorded:
    - Traveller status becomes **Client**

    - Trip status may move toward **Confirmed**, according to business rules

All traveller payments are entered and managed via the **Trip Manager**.

9.3 Provider Payments (Operations Side)

Once a trip is confirmed, the system generates **payment obligations** based on:

- Service Providers involved (HLH / OSP / HRP)
- Services included in the trip
- Agreed costs from trip costing

Each obligation is linked to:

- Trip ID
- Provider ID
- Service description
- Amount due / paid / remaining

Provider payment tracking is managed via the **Payments tab** of the HCT Dashboard.

9.4 Summaries and History Views (MVP)

9.4.1 Provider Payment History

HCT can view:

- all payments made to a given provider
- filtered by date range

- with Trip ID references and notes

9.4.2 Traveller Payment History

HCT can view:

- all payments received from a given traveller
- filtered by date range
- with Trip ID references

Available via the **TravelersTab** section of the HCT Dashboard.

---

10. Operational Reporting (Records, Not Analytics)

MVP reporting is mainly about **operational continuity**, not analytics dashboards.

The system should allow reliable retrieval of:

- Trip records (status changes, itinerary versions, providers involved)
- Payment records (traveller and provider)
- Provider engagement history (which provider worked on which trip, and when)

Trips should never be deleted - only:

- Status : Not confirmed / Confirmed / Running / Completed / Cancelled
- Stage : Open / Closed (completed + all payments settled)

Phase 2 Direction (Non-blocking)

Phase 2 can build on the same structure to add:

- Payment gateways
- Automated invoices/receipts
- Provider self-service portals for availability and pricing
- Stronger analytics and impact reporting

---

11. Dashboards for Service providers and travelers (MVP)

11.1 HRP / HLH / OSP Dashboard

Single structure, role-specific labels.

Common data:

- Identity & contacts
- Region
- Bank & UPI
- Notes

Service-specific data:

- Accommodation categories & pricing
- Vehicle types & cost per km
- Activity types & pricing

11.2 Traveller Dashboard

- Profile data
- Communication opt-ins

Nothing else in the MVP, but data related to Travellers are stored (trips, payments, Impact, etc.).

---

12. Heco Core Team (HCT) Dashboard – Detailed Specification

12.1 Purpose of the HCT Dashboard

The HCT Dashboard is the **operational control center** of the Heco Portal.

Its purpose is to:

- Monitor and manage **travellers, trips, and providers**
- Replace the existing **Google Sheets–based CRM and trip management**
- It will evolve in a complete Enterprise Resource Planning (ERP) in phase 2
- Allow HCT members to intervene when:
    - AI lacks data
    - Travellers request support
    - Manual validation is required

The dashboard is **not customer-facing** and prioritizes:

- Data density
- Clarity
- Speed of action

12.2 HCT User Roles and Access

Two types of HCT users:

- **Admin**
- **Collaborator**

Admin-only permissions:

- Create / remove HCT users
- Edit system-level lists

Collaborators have full operational access (via all the following tabs and the Trip manager) but no system-level configuration rights.

12.3 Global Layout of the HCT Dashboard

After login, an HCT user lands on the **HCT Dashboard Home**, which includes:

- A **top horizontal navigation menu** (in the form of tabs)
- A **main content area** with tabular and detail views
- A persistent **search bar** (Traveller / Trip ID / Name)

Main navigation sections (top horizontal tabs) :

1. Admin (only visible for admin users)
2. Control panels
3. Leads

4. Trips
5. Calendar
6. Payments
7. GST & Reporting
8. Providers
9. Travelers
10. Provider Applications

12.4 Admin tab

Purpose

The **Admin** tab centralizes all **system governance and configuration** actions that must not be available to Collaborators.

This tab is visible **only** to users with the Admin role.

A. HCT User Management (Admin only)

Admins can:

- Create new HCT users
- Assign role: **Admin / Collaborator**
- Activate / deactivate HCT users

Each user record includes:

- Full name

- Email (login identifier)
- Phone
- Role
- Status (active/inactive)

Behaviour rules:

- Deactivated users cannot log in
- Deactivated users remain visible in historical records (leads, trips, notes)

B. System Reference Lists (Admin only)

Admins can create, edit, or deactivate items in the master lists used across the platform:

- Regions
- Types of services
- Accommodation categories
- Vehicle types
- Activity types

Behaviour rules:

- These lists populate dropdowns across the portal
- Edits affect future entries and selections
- Historical data is not retroactively rewritten (records retain their previous value)

C. System Settings (Optional MVP bucket)

If needed in MVP, this tab can also hold:

- Default tax/GST parameters
- Default margin parameters
- Basic portal settings (labels, email templates later)

12.5 Control Panel tab

Purpose

The **Control Panel** is the **operational command interface** for Heco Core Team (HCT) members.

Its core functions in the MVP are:

- **Human–AI coordination**
- **Traveller support and exception handling**

The Control Panel provides operational tools that are accessible to **both Admins and Collaborators**.
All system governance and configuration actions reserved for Admin users are handled in the separate **Admin** tab.

Structure of the Control Panel

The Control Panel is divided into **five functional areas**:

A. Profile & Access Management
B. Traveller Support & Communication Hub
C. AI Interaction & Data Feeding Interface
D. Lead Follow-up Reminders
E. Experience and Regenerative project creation

A. Profile & Access Management

Each HCT user can:

- Edit their own profile:
    - Name
    - Photo
    - Password
- View:
    - Their role (Admin / Collaborator)
    - Their permissions

B. Traveller Support & Communication Hub

Purpose

This section centralizes **all support requests initiated by travellers** via the **“Request support”** button on the traveller-side portal.

Note: Traveller support is available only to logged-in users. If a traveller clicks the “Request support” button while not logged in, a log-in / sign-up pop-up is displayed before the request can be submitted.

It is the primary interface for **human intervention** in the traveller journey during the MVP.

Incoming Support Requests

Each support request includes:

- **Traveller ID**
- **Trip ID** (if already created)

- **Date & time of request** (auto-generated)
- **Traveller message** (free text)
- **Current traveller status**:
    - Lead
    - Client
- **Action button**: Erase request

Support requests appear in a **queue**, ordered by date and time.

Handling a Support Request

From this interface, an HCT member can:

- Open the associated **Trip Manager**
- Add **internal notes** in the Trip Manager
- Decide to:
    - Continue with **manual curation**
    - **Feed missing or corrected data to the AI**, allowing it to resume its work

This interface acts as the **human entry point into an otherwise AI-driven flow**.

In the MVP:

- Any further communication with the traveller happens **outside the platform** (phone, WhatsApp, email, etc.)

In Phase 2:

- Direct in-platform messaging with travellers will be the only communication option.

C. AI Interaction & Data Feeding Interface (MVP Critical)

Purpose

This section handles situations where the AI cannot proceed autonomously due to **missing, uncertain, or conflicting data**.

When blocked, the AI must:

- Explicitly state **what data is missing or unclear**
- Request **human intervention** via the Control Panel

In the MVP, the AI **never contacts Service Providers directly**.
All intervention happens via the HCT.

AI ↔ HCT Interaction

The Control Panel includes a **chat-style interface** where HCT members can:

- View AI-generated requests for missing data
- Ask the AI clarifying questions
- Manually feed **new or corrected data** to the AI
- Override AI assumptions when necessary

Typical examples include:

- Missing accommodation availability
- Transport distance or feasibility
- Pricing or service constraints
- Seasonality or logistical exceptions

AI Continuation Logic

Once the required data is provided:

- The AI integrates the new information
- Continues itinerary construction
- Automatically updates:
    - Pricing
    - Inclusions
    - Feasibility checks

All interactions are logged for operational traceability.

D. Lead Follow-up Reminders

Purpose

This section provides a **dynamic reminder list** to ensure timely follow-up on active leads.

Reminder Logic

When:

- A lead is assigned to an HCT user, and
- The current date exceeds
  Last communication date + Reminder delay (number of days)

The lead appears in their **Reminder list**.

Each reminder entry displays:

- Lead name

- Traveller ID
- Trip ID

Behaviour Rules

- This list is **read-only**
- No editing is possible from this section
- To:
    - Update lead status
    - Log communication
    - Edit notes
      the HCT user must go to the **Leads** tab

The Reminder list exists purely as an **attention and prioritization tool**.

E. Experience and Regenerative Project Creation

Purpose

This section provides **direct access** for HCT users to the **creation and management interfaces** for:

- Experiences
- Regenerative Projects (RPs)

It exists to centralize **content-building tools** used by HCT during the MVP phase.

Available Actions

This section contains **two action buttons**:

- **Button: “Manage Experiences”**
    - Redirects to the **Experience Management page**
    - This page allows HCT to:
        - create new experiences
        - edit existing experiences
        - erase experiences
- **Button: “Manage Regenerative Projects”**
    - Redirects to the **Regenerative Project Management page**
    - This page allows HCT to:
        - create new regenerative projects
        - edit existing regenerative projects
        - erase regenerative projects

12.6 Leads Tab

Purpose

This tab tracks **all travellers who started designing a trip but have not fully converted (paid)**.

Definitions (Lifecycle)

- A user becomes a **Traveller** when they **sign up** to the portal.
- A Traveller becomes a **Lead** when they **start building a trip**.

- A Lead becomes a **Client** when a **payment is received** (partial or full).
- A Client becomes a **Former Client** after the **completion of their first trip**.
- A Former Client becomes a **Lead again** when they start building their **next** trip.

Important link to Trip Manager:
When a payment is received from a Client, it is entered **in the Trip Manager → Trip Info tab** (Traveller payments section). This payment entry is what triggers the conversion logic (Lead → Client).

Table View (One row per Lead)

Each row represents one active lead (i.e., in Follow-up stage). The tab is optimized for **speed of follow-up and conversion**.

Columns

- **Date of enquiry** (auto-generated)
- **Traveller ID**
- **Traveller name**
- **Assigned HCT member**
- **Lead stage**
    - **Follow-up** (automatically set when a Lead starts building a trip)
    - **Won** (automatically set when a payment is received from the traveller)
        - removes the Lead from the Leads list
        - moves the Trip into the “Upcoming Trips” logic
    - **Lost** (manually set when the lead has lost interest)
        - removes the Lead from the Leads list
- **Trip ID** (if a trip exists)

- **Last interaction date**
- **Mode of interaction**
    - Call
    - WhatsApp
    - Email
- **Reminder delay** (number of days)
    - Last interaction date
    - once exceeded:
        - the lead appears as a reminder in the **Control Panel**
        - the row color becomes **reddish** to signal urgency
- **Notes** (internal only)
- **Action button: Open Trip Manager**

Behaviour Rules (Automation + Manual)

Auto-creation of lead

A Lead row is created when:

- a Traveller starts building a trip. This is recognized by the first meaningful trip-building action, not only the AI that starts making an itinerary.

Auto-stage changes

- **Follow-up** is set automatically when lead is created.
- **Won** is set automatically when a payment is recorded in Trip Manager.

    - This removes the lead from the Leads list.
- **Lost** is manual only (set by HCT).
    - This removes the lead from the Leads list.

Assignment

Leads can be assigned to an HCT member:

- manually by HCT
- (optional later) automatically by region / rotation rules

Lead History View (Pop-up)

Button: **“See all leads from date to date”** with ‘date from’ and ‘date to’ entry.

Opens a pop-up that shows:

- all leads in the selected date range
- regardless of stage (Follow-up / Won / Lost)

Within this pop-up:

- Stage can be edited, for example:
    - a Lost lead can be set back to **Follow-up** (returns it to Leads tab)
    - or changed to **Won** (set the trip to confirmed)

This pop-up functions as the **historical CRM layer**, while the main Leads tab shows only actionable follow-ups.

Entry Points to Trip Manager

From the Leads tab, Trip Manager can be opened via:

- **Open Trip Manager** button in each row
- Trip ID link (if implemented as link behaviour)

Trip Manager opens in a **new browser tab**.

12.7 Trips Tab (Upcoming Trips)

This tab shows **confirmed trips that are not yet completed**.

Table view:

Columns:

- Trip ID
- Traveller name
- Number of PAX
- Number of days
- Start date
- End date
- Trip price
- Amount paid by traveller
- Balance due
- **Action button: “Open Trip Manager”**
- **Button: “See all trips from date to date”**

Opens a pop-up view displaying the same table structure as the Trips tab.

Shows all trips within the selected date range, regardless of their status.

From this pop-up:

- the trip status can be edited directly
- changes are applied immediately and reflected across the system

This pop-up functions as a historical and management view, while the main Trips tab focuses on active and upcoming trips.

Behaviour:

- Completed trips are archived but remain accessible
- Clicking “Open Trip Manager” opens the trip in a **new browser tab**

This is the **second main entry point** to the Trip Manager.

12.8 Calendar Tab

A calendar visualization of **upcoming and running trips**.

Features:

- Each trip appears as a block spanning its dates
- Clicking a trip opens the **Trip Manager**

This is the **third entry point** to the Trip Manager.

12.9 Payments Tab

Purpose

The **Payments** tab allows the Heco Core Team (HCT) to **track and manage all manual payments** during the MVP phase.

It provides visibility over:

- Payments **to Service Providers (SPs)**
- Payments **from Travellers**

Payments are grouped **by trip**, allowing HCT to monitor financial closure on a per-trip basis.

A. Payments to Service Providers (SPs)

General Behaviour

When a trip is **confirmed**, the system automatically generates **payment entries** for that trip.

- Payment entries are grouped into **blocks**, one block per confirmed trip.
- Each block contains **all SP-related payment entries** for that trip.
- Trip blocks are ordered by **departure date**, with:
    - the trip departing **soonest** appearing at the top of the list.

Payment Entries Creation Rules

For each confirmed trip:

- A **payment entry is generated for each Service Provider involved**.
- When an **experience** is included in the trip:

    - **Only one payment entry** is generated for the corresponding **HLH**.
    - The HLH is responsible for paying any OSPs involved in the experience.
- The **HRP margin** for the trip is also generated as a **separate payment entry** and appears in the same trip block.

OSP payment entries are generated **only for services outside experiences**, according to the abstract service logic.

Payment Entry Fields

Each payment entry includes:

- **Date of entry** (auto-generated)
- **Service Provider name**
- **Type of service**
- **Trip ID**
- **Amount due** for the service
- **Amount paid**
- **Balance remaining**
- **Notes**

Actions on a Payment Entry

Each payment entry provides the following actions:

- **Button: “Add payment”**
    - Opens a pop-up to enter:

        - Amount
        - Date
        - Mode of payment
    - A **Payment ID** is automatically created and associated with the entry.
- **Button: “View payment history”**
    - Opens a pop-up listing all payments made to that SP for that specific trip.
    - Each payment record can be edited via:
        - **“Edit this entry”**

Trip Block Closure Logic

- When the **balance remaining reaches zero for all SPs** in a trip block:
    - The entire trip block **disappears from the Payments list**
- Payment history remains accessible via:
    - Trip Manager
    - Provider payment history views

B. Payments from Travellers

General Behaviour

Traveller payments are always linked to a **specific trip** and are **entered via the Trip Manager**.

When a trip is confirmed (i.e. when the first traveller payment is received):

- The trip also appears in the **Payments** tab,

- **After** the list of SP payment blocks.

Traveller Payment Entry Fields

Each traveller payment entry includes:

- **Traveller name**
- **Traveller ID**
- **Trip ID**
- **Trip price**
- **Total payment made**
- **Balance due**

Update Logic

- Traveller payments are entered exclusively in the **Trip Manager**
- When additional payments are recorded:
    - **Payment made** and **Balance due** are automatically updated
- The Payments tab reflects these updates in real time

The Payments tab is **read-only** for traveller payments and acts as a **financial overview**, not an input interface.

Key Principle

- **Trip Manager** = place where payments are entered and edited
- **Payments tab** = place where payments are **monitored and reconciled**

12.10 GST Tab

The GST module is primarily a **filterable list of traveller payments received** by month.

Filter:

- Month (e.g., “Jan 2026”)

Return table:

- Date of payment
- Client ID
- Client name
- Trip ID
- Amount received
- Mode of payment
- Trip price
- Trip start date

This enables:

- Monthly GST reporting preparation
- Easy export (Phase 2 automation optional)

12.11 Providers Tab

Lists all:

- HRPs
- HLHs
- OSPs

The list can be filtered by region, type, service.

Buttons for each SP:

- View and edit provider details
- See all trips linked to a provider (with date range)
- See payment history for a provider (with date range)

12.12 TravelersTab

Lists of all Travelers who have confirmed at least one trip with Heco, sorted by the end date of their last trip (most recent on top).

- Traveler name
- Traveler ID
- Traveler status

The list can be filtered by region and by date range.

Buttons for each Traveller:

- The list of their trips (with a button to access the Trip Manager)
- See payment history from that traveler

12.13 Provider Applications

Lists new registration requests from:

- HRPs
- HLHs
- OSPs

Table view:

- Applicant name
- User type
- Region
- Phone
- Email
- Button: “View / edit details”
- Button: “Approve / Reject / Request clarification”

The applicants disappear from the list after they are approved or rejected.

---

13. Trip Manager (HCT) – Detailed Specification

13.1 Purpose of the Trip Manager

The Trip Manager is the **single operational workspace for one specific trip**.

It allows HCT members to:

- View and edit trip data
- Override AI decisions
- Manage service providers

- Track finances
- Finalize itineraries

Each Trip Manager:

- Is linked to **one Trip ID**
- Opens in a **new browser tab**
- Is accessible from:
    - Leads tab
    - Trips tab
    - Calendar tab

13.2 Global Structure of the Trip Manager

Two main tabs:

1. **Trip Info**
2. **Trip Itinerary**

13.3 Trip Info Tab

This tab contains **all non-visual trip data**.

13.3.1 Trip Identity

- Trip ID
- Traveller ID

- Traveller name
- Traveller origin (Indian / Foreigner)
- Trip status:
    - Not confirmed (corresponding to the Lead status Follow-up)
    - Confirmed (when the associated Lead is won)
    - Running (during the date from day and last day of the trip)
    - Completed
    - Cancelled (this removes the trip from the Upcoming trips and removes the block of payments to SP in the payment tab of the HCT dashboard)
- Trip stage:
    - Open (as soon as a trip is being built)
    - Closed (only when completed + all payments settled or when the lead status is set to lost or if the trip status is set to cancelled)

13.3.2 Group & Logistics

- Pax breakdown:
    - Adults
    - Children
    - Infants
- Start date
- Start location
- End date

- End location
- Regions involved
- HRPs involved
- HLHs and OSPs involved

13.3.3 Travel preferences

List of the travel preferences already filled by the traveller or by the AI

13.3.4 Financial Snapshot

Editable percentages, auto-calculated amounts. The following break up is possible thanks to the financial structure of all experiences.

- Transportation cost
- Accommodation cost
- Guide cost
- Activity cost
- Other costs
- Total cost

Margins:

- Margin to Regenerative Projects (% → amount)
- Margin to HRP (% → amount)
- Commission to HCT (% → amount)

Final pricing:

- Subtotal
- GST
- Final trip price

13.3.5 Payments from Traveller

- List of payments received:
    - Date
    - Amount
    - Mode
- Total paid
- Balance due
- **Button:** Add a payment
- **Button**: Payment history (opens a pop-up with payment details for that particular trip. Each entry should be editable by clicking “Edit this entry”)

13.3.6 Payments to SP

When a payment is done and entered in the Payments Tab of the HCT dashboard, it is populated here.

Of course, only the payments related to a particular trip appear here.

- Payment to (SP name)
- Date of payment
- Amount paid

13.3.7 Pickup & Drop Details

- Pickup location & time
- Drop location & time
- Notes for operations

13.3.8 Notes

A free text note to enter any other relevant information

13.4 Trip Itinerary Tab (HCT View)

Purpose

The **Trip Itinerary tab (HCT view)** is the operational version of the **Traveller "Your Journey" trip planner**.

It uses the **same AI logic, structure, and visual principles** as the traveller itinerary, but gives **greater control and override capabilities** to HCT users.

This tab is the **authoritative place** where HCT can:

- validate and adjust itineraries
- resolve operational constraints
- prepare trips for execution

General Behaviour

- The itinerary is **AI-generated by default** when a traveller designs their trip.

- HCT users can:
    - edit the itinerary manually
    - request AI intervention explicitly
- **AI does not intervene automatically** once the HCT is editing the itinerary.

Layout and Functional Areas

The Trip Itinerary tab is structured into **three vertical columns**.

A. Left Column — Experience Search & Selection

This column allows HCT users to **search and add experiences** to the trip.

Components

- **Search bar** to find experiences
- **Search results list** displayed below the search bar

Behaviour

- Experiences can be:
    - dragged and dropped into the itinerary timeline
    - inserted at any position in the trip
- Adding or removing experiences triggers:
    - itinerary recalculation
    - pricing recalculation
    - feasibility checks (when AI is requested)

B. Center Column — Itinerary Timeline

This column displays the **day-by-day itinerary timeline**, visually identical to what the traveller sees in the **Your Journey** tab.

Behaviour

- Each day appears as a block on the timeline
- Days can be:
    - reordered
    - added
    - removed
- Experiences can be:
    - dragged to different days
    - reordered relative to each other

AI Interaction

- AI suggestions and recalculations:
    - **do not occur automatically**
    - occur **only when explicitly requested** by the HCT user

This ensures that HCT retains full control during operational adjustments.

C. Right Column — Day-Level Services & Providers

For each day in the itinerary, a corresponding **service panel** appears in the right column, aligned with that day's timeline block.

Day Locking Rule

- If a day is **locked by an experience**:
    - the list of services is **not editable**
    - services are inherited from the experience definition
- If a day is **not locked by an experience**:
    - services are fully editable by HCT

Service List per Day

Each editable day displays a list of:

- **Service Providers (SPs)**
- **Service types**
- **Associated costs**
- **Notes**

This list represents the **operational services required for that day**.

AI-Generated vs Manual Entries

- When the trip originates from a traveller-designed itinerary:
    - the service list is **pre-filled by the AI**
    - based on traveller inputs and regional rules
- When an HCT user starts an itinerary **from scratch** (possible in MVP):

    - the service list is **initially empty**
    - HCT can:
        - ask the AI to populate services
        - or add them manually

Editing Services and Providers

For each service entry in a day:

- The **Service Provider** can be:
    - replaced manually using a **dropdown list** of available SPs
- Each service entry includes:
    - Service type (dropdown)
    - Cost (manual input)
    - Notes (free text)

Additional controls:

- **Plus (+) button** after the last service:
    - add a new service entry (SP + service type + cost + note)
- **Minus (–) button** on each service entry:
    - remove that service from the day

Key Principles

- The Trip Itinerary tab is **operational**, not exploratory

- HCT actions take precedence over AI suggestions
- AI acts **only on request**
- Experience-based days remain protected to ensure consistency

---

14. MVP vs Phase 2 – Data Flow Logic

Phase 1 (MVP)

- AI lacks data → request sent to HCT
- HCT contacts providers manually
- HCT feeds AI manually
- Manual overrides everywhere

Phase 2 (Full System)

- AI contacts providers directly via app
- Data is stored automatically
- HCT supervises and overrides when needed
- Enables national & international scaling

---

15. Experience management (HCT)

Purpose

The **Experience Management** section allows the Heco Core Team (HCT) to **create, edit, disable, and manage all experiences** available on the platform.

This page is used during the MVP phase to:

- build the experience catalogue,
- maintain consistency and quality,
- ensure experiences are correctly linked to regions and providers.

15.1 Experience List Page

General Behaviour

The Experience List page displays **all experiences registered in the system**, regardless of their current status.

It serves as the **central management view** for experiences.

Filters

The list can be filtered using the following criteria:

- **Region**
- **HLH (Heco Local Host)**
- **HRP (Heco Regional Partner)**

Filters can be combined to narrow down the list.

Experience List View

Each experience appears as a single row in the list, with the following fields:

- **Experience ID**
- **Experience name**
- **Region**

- **HLH**
- **HRP**
- **Duration**
- **Action button: Edit**
- **Action button: Disable**

Actions

- **Edit**
    - Opens the **Experience Creation / Editing page** in a **new browser tab**
- **Disable**
    - Makes the experience unavailable for selection by travellers
    - Does not delete the experience
    - Disabled experiences remain visible in the list for record and reactivation if needed

---

15.2 Experience Creation / Editing Page

Purpose

This page is used to **create new experiences** or **edit existing ones**.

It is the authoritative interface for defining all experience-related data.

Data Collected for an Experience

The Experience Creation page includes the following fields:

Identification & Ownership

- **HLH name**
- **HLH ID**
- **Region**
- **Type of experience**
- **RP that is attached to the experience**

Descriptions

- **Short description**
- **Long description**

Descriptions are used both for traveller-facing display and internal reference.

Cost Breakdown

- Detailed breakdown of experience costs
- Includes all services bundled within the experience
- Costs entered here are used during trip pricing

Constraints

- Physical or logistical constraints
    - group size limits
    - fitness requirements

    - age restrictions
    - other operational conditions

Seasonality

- Periods when the experience is:
    - available
    - restricted
    - unavailable

Media

- **Card image** (main visual used in listings)
- **Photo gallery** (multiple images)

Behaviour Rules

- Changes made on this page:
    - apply immediately to future trip building
    - do not retroactively affect already confirmed trips
- Experience creation and editing are handled **exclusively by HCT** in the MVP

16. Regenerative project Creation (HCT)

Purpose

The **Regenerative Project Management** section allows the Heco Core Team (HCT) to **create, edit, disable, and manage all Regenerative Projects (RPs)** displayed on the platform.

This section ensures that:

- regenerative impact is **real and project-based**,
- each region can be linked to an active RP,
- impact calculations are grounded in concrete on-ground initiatives.

16.1 Regenerative Project List Page

General Behaviour

The Regenerative Project List page displays **all regenerative projects registered in the system**, regardless of their current status.

It serves as the **central management view** for RPs.

Filters

The list can be filtered using the following criteria:

- **Region**
- **Local Association (LA)**
- **Project status** (active / inactive)

Filters can be combined.

Regenerative Project List View

Each Regenerative Project appears as a single row with the following fields:

- **RP ID**
- **RP name**
- **Region**
- **Local Association (LA)**
- **Type of regenerative action**
- **Action button: Edit**
- **Action button: Disable**

Actions

- **Edit**
    - Opens the **Regenerative Project Creation / Editing page** in a **new browser tab**
- **Disable**
    - Makes the RP unavailable for new trips
    - Does not delete the RP
    - Disabled RPs remain visible for record-keeping and potential reactivation

---

16.2 Regenerative Project Creation / Editing Page

Purpose

This page is used to **create new regenerative projects** or **edit existing ones**.

It is the authoritative interface for defining how regenerative impact is generated and reported.

Data Collected for a Regenerative Project

Identification & Governance

- **Project name**
- **Region**
- **Local Association (LA)**
- **Type of regenerative action**
    - e.g. reforestation, fire prevention, ecogical restoration, education, etc.

Description

- **Short description** (traveller-facing)
- **Detailed description** (internal and reporting use)

Impact Logic & Metrics

- **Impact unit definition**
    - e.g. trees planted, hectares protected, fire breaks maintained, etc.
- **Conversion rules**
    - how financial contributions are translated into physical impact
- **Measurement frequency**
    - one-time
    - periodic
    - cumulative

Budget & Allocation (MVP Scope)

- Reference budget information
- Cost per impact unit (where applicable)

Seasonality & Constraints

- Periods when the project is:
    - active
    - paused
- Operational or environmental constraints

Media

- **Main image** (used on RP cards)
- **Photo gallery** (documentation and evidence)

Behaviour Rules

- RPs can be:
    - linked directly to a region, or
    - used as a fallback for regions without an active RP
- Changes to RP data:
    - apply to future trips
    - do not retroactively modify past impact records
- RP creation and editing are handled **exclusively by HCT** in the MVP

---

17. SP application page

Purpose

The **Service Provider Application Page** allows external actors to **apply to join the Heco ecosystem** as Service Providers (SPs).

This page is accessible from the **top navigation menu** of the homepage via the link **“Join the Heco family”**.

It serves as the **single entry point** for all provider applications during the MVP phase.

Target Applicants

This application page is intended for:

- **Heco Regional Partners (HRPs)**
- **Heco Local Hosts (HLHs)**
- **Other Service Providers (OSPs)**

Applicants select their provider type during the application process.

Access and Behaviour

- The page is publicly accessible
- Applicants have to create an account before applying
- Submitting an application **does not automatically activate** the provider

All applications require **review and approval by HCT**.

17.1 Application Form – Data Collected

The application form collects the following information.

Identification & Contact Information

- Name of individual or organization
- Contact person
- Email address
- Phone number

Provider Type & Scope

- Type of provider:
    - HRP
    - HLH
    - OSP
- Region(s) of operation
    - (HRPs are limited to one region)

Service Information

Depending on provider type, the applicant may specify:

- Type(s) of services offered
    - accommodation
    - transport

    - guiding
    - activities
    - ticketing
    - other
- Short description of services

Optional Information

- Experience background
- Motivation to work with Heco
- Additional notes or comments

17.2 Submission and Post-Submission Behaviour

- Once submitted:
    - the application is stored in the system
    - it appears in the **Provider Applications** tab of the **HCT Dashboard**
- The applicant receives:
    - a confirmation message (on screen and/or by email)

No operational access is granted at this stage.

17.3 Review and Approval Workflow (MVP)

- All applications are reviewed by **HCT**
- Possible outcomes:
    - **Approved** → provider becomes active and selectable
    - **Rejected** → application is closed
    - **Clarification requested** → follow-up happens outside the platform (email, phone, etc.)

Detailed approval logic is handled in the **Provider Applications** section of the HCT Dashboard.

Key Principle

The **SP Application Page**:

- lowers entry barriers for new partners
- centralizes provider onboarding
- ensures that **all providers enter the system through a controlled, reviewed process**

---

18. Your itineraries (Travellers)

Purpose

The **Your itineraries** menu item allows travellers to **access, resume, and manage all trips they have created**, regardless of their status.

Trip Saving Logic

- When a traveller starts building a trip, it is **automatically saved** by the system.
- If the traveller does not click **“Save this trip”**, the trip:

    - remains identified only by its **Trip ID**

- When the traveller clicks **“Save this trip”**:
    - they are invited to assign a **custom name** to the trip
    - the trip is then displayed with:
        - its **trip name**
        - followed by the **Trip ID**

A traveller can build and keep **multiple trips simultaneously**.

Access After Log-in

After logging back in, travellers can access all their saved trips via the **Your itineraries** menu item in the top navigation.

This page displays **all trips created by the traveller**, whatever their status.

Trips List View

The **Your itineraries** page presents a table with the following columns:

- **Trip ID**
- **Trip name** (if the trip has been named)
- **Last opened** (date and time)
- **Action: Open this trip**
    - redirects the traveller to the **Your Journey** tab of the homepage with the data of that particular trip
- **Action: Erase this trip**

Behaviour Rules

- Opening a trip resumes it **exactly where it was left**
- Erasing a trip:
    - permanently removes it from the traveller's list
    - does not affect other trips
- Only trips belonging to the logged-in traveller are visible

---

19. Connection with himalayanecotourism.com

Purpose

The **heco.eco portal** must be connected to the existing content of **himalayanEcotourism.com**.

The primary reason is **SEO continuity**.

himalayanecotourism.com has:

- been active for many years,
- accumulated strong search engine authority,
- and contains a large amount of region-specific content.

This existing authority should be **leveraged**, not lost, during the transition to heco.eco.

Content Migration Principle

The long-term objective is to:

- progressively **move or replicate** the HimalayanEcotourism.com content onto the **heco.eco** domain,

- while **preserving search engine ranking and authority**.

The exact technical strategy (redirections, canonical URLs, content migration, etc.) will need to be defined **with an SEO expert**, to avoid loss of ranking.

This document does not prescribe the SEO implementation, only the **functional integration requirement**.

Functional Linking Between heco.eco and Existing Content (MVP)

In the MVP, the integration is achieved through **contextual linking**, not full migration.

Homepage Map Integration

- The homepage of heco.eco features a **map-based interface**.
- When the user zooms into the map:
    - region names appear on the map.
- Each region name:
    - acts as a **clickable link**.

Behaviour of Region Links

- Clicking on a region name:
    - opens the **corresponding region landing page** from the existing himalayanecotourism.com content
    - in a **new browser tab**
- The heco.eco AI-powered homepage remains open in the original tab.

This ensures that:

- users can explore rich editorial content without losing their trip-building context,

- the AI-driven experience on heco.eco is not interrupted.

Key Principle

The connection between heco.eco and HimalayanEcotourism.com is designed to:

- capitalize on existing SEO strength,
- support gradual migration,
- and ensure immediate visibility of heco.eco in search engines,
  without compromising the AI-driven user experience.

Experience data

Experience – Complete Data Checklist (MVP-oriented)

1. Identification & Ownership

- **Experience ID** : 837465
- **Experience name** : Village experience in Tar
- **HLH name** : Tsering Angmo
- **HLH ID** : hlh-832587
- **Region** : Ladakh
- **HRP** (linked via region) : Sonam Wangchuk
- **Type of experience :** (trek, cultural immersion, spiritual experience, nature, etc.)

---

2. Descriptions (Traveller-facing)

- **Short description** :

Discover the authentic village life of Ladakh by staying in a traditional home in a remote village inaccessible by road and in a beautiful mountain setup.

- **Long description** :

Immerse yourself in one of Ladakh's most remote and authentic cultural landscapes with this 2-night village experience in Tar Village. Tucked deep in the rugged valleys of the Sham region along the Indus River, Tar is a settlement that has preserved its traditional way of life precisely because it remains largely inaccessible by road. The journey itself — a scenic hike through a narrow mountain gorge — sets the tone for what lies ahead: a genuine connection with people, landscape, and tradition that few travellers encounter.

This experience invites you to live as the villagers live — staying in traditional homes, sharing meals, and participating in daily rhythms shaped by ancient agricultural practices in a high-altitude desert environment. With only a handful of families residing year-round, Tar's community has maintained deep cultural roots, vibrant local traditions, and a remarkable

hospitality born of centuries of mountain life. Here, modernity has limited influence, and every interaction carries a sense of genuine human warmth amid breathtaking natural beauty.

Your days in Tar begin with the slow dawn over towering arid peaks, where the first light reveals fields of barley and apricots, and the silence is broken only by birdsong and the distant murmur of the river. As you explore the village lanes, meet elders and hosts who welcome you into their homes, you'll discover a way of life grounded in self-sufficiency, mutual support, and respect for the fragile mountain environment. Simple moments become memorable — sharing Ladakhi butter tea, helping gather produce during planting or harvest seasons, or listening to stories beside a traditional hearth.

- **What makes this experience unique**

This experience is more than a stay — it's an invitation to slow down, to walk where cars cannot reach, and to witness life shaped by nature and centuries-old traditions. By staying in Tar Village, you not only uncover authentic Ladakhi culture, but you also support a community that has worked to preserve its way of life responsibly, sustainably, and thoughtfully in the face of change.

- **Cultural / environmental context**

Beyond cultural immersion, the area offers spectacular landscapes and trekking opportunities. The path to Tar traces a dramatic gorge before opening into a green oasis against a backdrop of rugged mountain walls. Treks to nearby passes or along ancient routes echo with views that shift from barren slopes to unexpected pockets of greenery. Local guides can lead you through these trails, giving context to the plants, terrain, and history that define this extraordinary corner of the Himalayas.

---

3. Duration & Structure

- **Duration**, is it :
    - **Less than a day ->** duration in hours
    - **single-day**
    - **Multi-day** -> 3 days - 2 nights
- **Starting time** : 10am
- **Ending time** : 2pm
- **Does it include accommodation?** Yes

---

4. Location & Access

- **Starting point** :
    - Latitude/Longitude
- **Ending point** :
    - Latitude/Longitude
- **Area** (sub-region level, optional) : Sham valley
- **Access constraints** :
    - trekking required : Yes
    - road seasonal closure : No
- **Altitude max** (optional)
- **Altitude min** (optional)

---

5. Included Services (Inside the Experience)

(These are locked when the experience is selected)

- **Accommodation category** : Cat. D
- **Meals** :
    - Breakfast : Yes
    - Lunch : Yes
    - Dinner : Yes
- **Guide included?** : Yes
- **Transport during experience included?** No

---

8. Cost Structure (Internal / HCT)

- Base cost per person
- Cost breakdown:
    - accommodation
    - logistics
    - guide
    - activities
    - other
- Seasonal price variation (if any)
- Minimum / maximum group size
- Single supplement (if applicable)

---

8. Constraints & Conditions

- Physical difficulty level
- Fitness requirements
- Age limits (if any)
- Group size limits (min / max)
- Weather dependency
- Cultural sensitivities
- Environmental constraints

---

9. Seasonality

- Best season(s)
- Available months
- Restricted months
- Not available months
- Special notes (monsoon, winter isolation, harvest period, etc.)

---

10. Service Providers Inside the Experience

- Are OSPs involved?
    - yes / no
- If yes:
    - what service do they provide?

---

11. Impact & Regenerative Link

- Linked Regenerative Project (RP)
- How the experience contributes:
    - financially
    - socially
    - environmentally
- Any specific community benefit

---

12. Media

- Main card image
- Photo gallery
- Optional:
    - short video
    - map illustration

---

13. Traveller Information & Preparation

- What travellers should bring
- Clothing recommendations
- Health / altitude notes
- Electricity / network availability
- Cultural etiquette tips

---

14. Operational Notes (Internal – HCT / HRP)

- Known operational risks
- Past issues / lessons
- Backup options
- Emergency considerations