Product Requirements Document: Outfitter - Invoicing, Booking, and Calendar Management Software

1. Introduction

* **1.1 Purpose:** This document outlines the requirements for Outfitter, a web-based software solution designed to streamline operations for hunting outfitters and fishing guides. The platform will provide tools for invoicing, booking management, calendar scheduling, customer relationship management, staff management, payment tracking, document storage, and system settings. It will also include a customer-facing booking experience.
* **1.2 Goals:**

    * Provide a modern and intuitive dashboard for outfitters and guides to manage their business.
    * Simplify the booking process for both outfitters/guides and their customers.
    * Automate invoicing and integrate seamlessly with QuickBooks for payment processing and financial management.
    * Enhance communication and organization through centralized calendar and customer management tools.
    * Offer flexible user permissions to control access for administrators and guides.
    * Ensure the application is mobile-friendly and ready for future mobile app development.
* **1.3 Target Users:**

    * **Administrators:** Owners or managers of outfitting businesses who require full access to all features, including billing and system configuration.
    * **Guides:** Employees or contractors who need to manage their schedules, bookings, customers, and documents, but cannot create or modify experiences.
    * **Customers:** Individuals looking to book hunting or fishing experiences offered by outfitters using the platform.
* **1.4 Scope:**

    * Development of a web-based dashboard for administrators and guides.
    * Development of a customer-facing web experience for booking and payment.
    * Integration with QuickBooks for checkout and invoicing.
    * User sign-up and authentication for both internal users and customers.
    * Implementation of two distinct user permission levels (Admin and Guide).
    * Adherence to a hunter green and white color scheme.
    * Ensure the web application is responsive and mobile-friendly, with consideration for future mobile app development.
* **1.5 Exclusions:**

    * Mobile applications (will be considered for future phases, but the web application should be designed with mobile in mind).
    * Advanced marketing automation features.

* Inventory management beyond what is directly related to experience booking.

2. User Stories

* **Admin User Stories:**

   * As an Admin, I want to be able to log in to a secure dashboard to manage all aspects of my outfitting business.
   * As an Admin, I want to see a quick overview of upcoming bookings, recent payments, and calendar events on the Dashboard.
   * As an Admin, I want to be able to create and manage different hunting and fishing experiences (My Experiences tab) with details like duration, pricing, availability, and descriptions.
   * As an Admin, I want to view and manage the availability of guides and resources on a Calendar.
   * As an Admin, I want to create, view, edit, and manage Bookings, including assigning guides and resources.
   * As an Admin, I want to manage Customer profiles, including contact information, booking history, and notes.
   * As an Admin, I want to add, edit, and manage Staff (guide) accounts and their permissions.
   * As an Admin, I want to generate invoices and process payments through QuickBooks (Payments tab).
   * As an Admin, I want to upload and manage important Documents related to trips, customers, or staff.
   * As an Admin, I want to configure system-wide Settings, such as company information, payment gateway integration, and notification templates.
   * As an Admin, I want to generate a unique link to the customer-facing booking experience.
   * As an Admin, I want to track and view financial reports generated from QuickBooks data within the dashboard.
* **Guide User Stories:**

   * As a Guide, I want to be able to log in to a secure dashboard to manage my assigned tasks.
   * As a Guide, I want to see my assigned bookings and calendar events on the Dashboard.
   * As a Guide, I want to view the details of the experiences I am assigned to (My Experiences tab).
   * As a Guide, I want to view my schedule and availability on the Calendar.
   * As a Guide, I want to view the details of the Bookings I am assigned to, including customer information and trip details.
   * As a Guide, I want to view the profiles of the Customers I will be working with.
   * As a Guide, I want to access relevant Documents related to my assigned trips.
   * As a Guide, I want to manage my personal profile and preferences within the Settings tab (excluding billing settings).
* **Customer User Stories:**

* As a Customer, I want to be able to access a booking page through a provided link.
* As a Customer, I want to be able to browse available hunting and fishing experiences.
* As a Customer, I want to view details about each experience, including pricing, duration, and availability.
* As a Customer, I want to select a date and time for my desired experience.
* As a Customer, I want to provide my personal information for the booking.
* As a Customer, I want to securely pay for my booking through QuickBooks.
* As a Customer, I want to receive confirmation of my booking.

3. Functional Requirements

* **3.1 User Authentication and Authorization:**

  * **3.1.1 Sign-up:**

    * Administrators should be able to create their accounts with email and password.
    * The system should support secure password storage.
  * **3.1.2 Login:**

    * Administrators and Guides should be able to log in with their credentials.
    * The system should implement secure authentication protocols.
  * **3.1.3 User Roles and Permissions:**

    * Implement two distinct user roles: Admin and Guide.
    * Admin users should have full access to all features.
    * Guide users should have access to all features *except* the ability to create or modify experiences in the "My Experiences" tab. They should also not have access to the Payments tab and any billing-related functionalities within the Settings tab.
* **3.2 Dashboard:**

  * Display a personalized overview for each user role upon login.
  * For Admins: Show key metrics like upcoming bookings, recent payments, and a snapshot of the calendar.
  * For Guides: Show their assigned upcoming bookings and calendar events.
* **3.3 My Experiences:**

  * **3.3.1 Admin Functionality:**

    * Create new hunting and fishing experiences with details such as name, description, duration, pricing (including different package options if applicable), capacity, location, and associated resources (e.g., boats, equipment).
    * Manage and edit existing experiences.
    * Set availability rules and schedules for each experience.
    * Categorize experiences (e.g., by game type, fishing type, season).

* **3.3.2 Guide Functionality:**

    * View details of the experiences they are assigned to.
* **3.4 Calendar:**

    * Display a visual calendar showing bookings, guide availability, and potentially blocked-out dates.
    * Support different calendar views (e.g., daily, weekly, monthly).
    * Allow Admins to create and manage bookings directly from the calendar.
    * Allow Admins to assign guides and resources to bookings through the calendar.
    * Allow Guides to view their assigned bookings and personal availability on the calendar.
* **3.5 Bookings:**

    * **3.5.1 Admin Functionality:**

        * View a list of all bookings with details such as customer name, experience booked, date, time, assigned guide, and payment status.
        * Create new bookings manually.
        * Edit and manage existing bookings (e.g., reschedule, cancel, update details).
        * Assign and reassign guides and resources to bookings.
        * Track the status of each booking (e.g., pending, confirmed, completed, cancelled).
        * Generate invoices for bookings (which will trigger QuickBooks integration).
    * **3.5.2 Guide Functionality:**

        * View a list of their assigned bookings with relevant details.
        * Potentially update the status of bookings they are involved in (with Admin approval if needed).
* **3.6 Customers:**

    * **3.6.1 Admin Functionality:**

        * Maintain a database of customer profiles, including contact information, booking history, and any relevant notes.
        * Add new customer profiles manually.
        * Edit and update existing customer profiles.
        * Search and filter customers based on various criteria.
        * Potentially communicate with customers through the platform (basic email integration).
    * **3.6.2 Guide Functionality:**

        * View the profiles of the customers they are scheduled to work with.
* **3.7 Staff:**

    * **3.7.1 Admin Functionality:**

* Create and manage staff (guide) profiles, including contact information, availability, and assigned experiences.
        * Assign user roles (Guide).
        * Manage guide availability (which integrates with the Calendar).
* **3.8 Payments:**

    * **3.8.1 Admin Functionality:**

        * View a list of invoices and their payment status (pulled from QuickBooks).
        * Track payments and reconcile them with bookings.
        * Generate reports on payment activity.
        * Configure QuickBooks integration settings.
* **3.9 Documents:**

    * **3.9.1 Admin Functionality:**

        * Upload and organize important documents (e.g., waivers, permits, safety guidelines).
        * Categorize documents for easy retrieval.
        * Associate documents with specific experiences, customers, or staff.
    * **3.9.2 Guide Functionality:**

        * View documents relevant to their assigned trips or customers.
* **3.10 Settings:**

    * **3.10.1 Admin Functionality:**

        * Manage company profile information (name, address, logo).
        * Configure QuickBooks integration settings (API keys, etc.).
        * Customize notification templates (e.g., booking confirmations).
        * Manage user accounts (create, edit, deactivate).
        * Generate the unique link for the customer-facing booking experience.
    * **3.10.2 Guide Functionality:**

        * Manage their personal profile information (e.g., contact details, password).
* **3.11 Customer-Facing Booking Experience:**

    * Accessible via a unique link generated by the Admin.
    * Display a catalog of available hunting and fishing experiences with descriptions, pricing, and availability.
    * Allow customers to select an experience, date, and time.
    * Collect necessary customer information for the booking.
    * Integrate with QuickBooks for secure checkout and payment processing.
    * Provide booking confirmation to the customer.
* **3.12 QuickBooks Integration:**

* Seamlessly integrate with QuickBooks for payment processing during customer booking.
   * Automatically generate invoices in QuickBooks upon booking creation in the Outfitter dashboard.
   * Sync payment status from QuickBooks back to the Outfitter dashboard.
   * Allow Admins to view financial data and reports pulled from QuickBooks within the Outfitter dashboard (basic reporting).

4. Non-Functional Requirements

* **4.1 Usability:**

   * The dashboard should have a modern, clean, and intuitive user interface.
   * Navigation should be clear and consistent, ideally with a left-side menu.
   * The system should be responsive and accessible on different screen sizes.
   * Error messages should be informative and user-friendly.
* **4.2 Performance:**

   * The application should load quickly and respond promptly to user actions.
   * The system should be able to handle a reasonable number of concurrent users and bookings.
* **4.3 Security:**

   * Protect user data with appropriate security measures, including encryption of sensitive information.
   * Implement secure authentication and authorization mechanisms.
   * Follow best practices for web application security to prevent common vulnerabilities.
* **4.4 Reliability:**

   * The system should be stable and available with minimal downtime.
   * Data should be backed up regularly to prevent loss.
* **4.5 Maintainability:**

   * The codebase should be well-structured and documented to facilitate future maintenance and updates.
* **4.6 Scalability:**

   * The architecture should be designed to accommodate future growth in users, data, and features.
* **4.7 Mobile-Friendliness:**
      * The web application must be fully responsive and function correctly on various mobile devices (phones and tablets).
      * The UI should adapt to different screen sizes and orientations.
      * Consider touch-friendly navigation and input methods.

* Ensure performance is optimized for mobile devices.
        * The application architecture should be designed with the future development of native mobile apps in mind.

5. User Interface (UI) Design Guidelines

* **5.1 Color Scheme:** Hunter green (#347235) and white (#FFFFFF) should be the primary colors. Accents of a lighter green or gray can be used for secondary elements.
* **5.2 Layout:** The dashboard should feature a consistent layout with a left-side navigation menu containing the following tabs:

    * Dashboard
    * My Experiences
    * Calendar
    * Bookings
    * Customers
    * Staff
    * Payments
    * Documents
    * Settings
* **5.3 Typography:** Use clear and readable fonts.
* **5.4 Branding:** Incorporate the "Outfitter" name and potentially a simple logo in the header.
* **5.5 Customer-Facing Experience:** Should have a clean and inviting design that aligns with the overall Outfitter brand.

6. Open Issues

* Specific details of QuickBooks API integration need to be researched and documented.
* Detailed workflows for booking management and invoicing need to be defined.
* Specific data fields required for each module (e.g., customer details, experience attributes) need further elaboration.
* Error handling and validation requirements need to be specified.
* Reporting requirements beyond basic QuickBooks integration need to be defined.

7. Future Considerations (Out of Scope for Initial Release)

* Mobile applications for Admins and/or Guides.
* Advanced reporting and analytics features.
* Integration with other third-party services (e.g., marketing platforms, weather APIs).
* More granular user permissions.
* Automated email marketing capabilities.