

REQUEST FOR PROPOSAL:

ONTARIO FEDERATION OF SNOWMOBILE CLUBS
(OFSC)

Permit System Development &
Maintenance

February 24, 2023



INTRODUCTION & PROJECT OVERVIEW

The Ontario Federation of Snowmobile Clubs (OFSC) is accepting proposals for the development and maintenance of its permit system. The functionality of the permit system will be split into two aspects;

1. Reporting & Administrative Functionality
2. Customer Facing Functionality

ABOUT THE OFSC

The Ontario Federation of Snowmobile Clubs (OFSC) is a volunteer led not-for-profit association that provides the voice for organized snowmobiling in the Province of Ontario.

Our **Mission**

Provide leadership to member organizations in our commitment to enable exceptional snowmobile trails and rider experiences throughout the province.

Our **Vision**

Snowmobiling is recognized and celebrated as Ontario's premier winter recreation and tourism experience.

As a provincial federation, the OFSC succeeds when our members succeed. Consequently, we strive to fully understand and consistently meet the needs and expectations of all our various members. Our decision-making processes are accountable, transparent, inclusive, timely, provincial in perspective, and respectful of local interests and priorities.

SCOPE OF WORK

Reporting and Administrative Functionality

CRM style system with the following features:

1. Home page with menu to sections 2 to 7 below and search functionality by:
 - Customer (search by email, last name or phone number) with results for anyone with a profile but not restricted to only those who have made a purchase. List of results presented and when clicked on, it would take us to the customer profile as described in number 2, below
 - Permit orders (search by order id, permit number, last name, email, phone, partial last name, partial email and partial phone)
 - Allows us to find a customer/order based on criteria other than customer email, etc. when there may be typos but other info in a VM or email is available for us to use in a search. When customer/order found, it would take us to the customer profile as described in B below
 - Gift Card (GC) orders
 - List of all unredeemed gift cards with details (purchase date, order id, redemption code, purchaser's email, recipient last name, recipient postal code, type of GC, if refunded)
 - Search by order id, redemption code, customer email, recipient last name
 - Ability to edit last name or postal code on gift card and resend to purchaser
 - Transfers

2. Robust interface with all customer profile and transaction information (current season and list of historical transactions to follow permit purchase, transfer of permits to another snowmobile/customer, etc. so can follow full chain of events) in one place (rather than us having to go into various search tools or systems) available for each customer:
 - Profile information (address/contact details)
 - List of system generated emails (account creation, password reset, etc.) issued to customer and ability to resend it at click of button
 - Preferences (newsletter, volunteer, etc.)
 - Registered snowmobiles
 - Year, make, model, VIN, registration number
 - Seasonal/Classic permit purchases by season
 - Date of original purchase, order number, method of payment (credit card vs gift card), order payment status (approved, not approve, etc.), date sent to fulfillment house (DCM) & batch number, permit number, date shipment email sent, shipping method, alternate address, tracking number, ability click on tracking number and connect directly to Purolator or Canada Post Xpresspost to see status of delivery
 - Ability to correct address, or alternate address, if order not yet sent to DCM
 - If a permit transfer is requested, for the respective permit on their account indicate that a transfer request is associated with the permit and show date of request submission, transfer number, status (waiting, approved, declined), snowmobile or other customer permit is being transferred to. Once approved, show where the permit was transferred
 - If a permit was replaced, for the respective permit on their account show both the original permit number and that it was destroyed or reported lost/stolen along with, when approved, the new permit number
 - List of system generated emails (order confirmation, shipment confirmation, etc.) issued to customer and ability to resend it at click of button
 - Ability to see if customer clicked on temp permit link, reset temp permit link so customer can click on it again to print/ download
 - For purchases/transfers after Dec 2, ability to reset temp permit or extend temp permit (if permit lost in mail, delay in fulfillment, etc.)
 - Multi Day (MD) permit purchases
 - Date of purchase, order number, start and end date of permit
 - Ability to reset MD link
 - List of system generated order confirmation email issued to customer and ability to resend it at click of button
 - Special Event permit purchases
 - Date of purchase, order number, event name, date of event/permit
 - Ability to reset link
 - List of system generated order confirmation email issued to customer and ability to resend it at click of button
 - Transfer/replacement requests
 - Date of request submission, order number, if approved or declined, (if approved, start and end date of permit and temp permit) and payment status.

- Indicate snowmobile or other customer permit is being transferred to. When approved, show where the permit was transferred to (like what is in transfers now)
 - If replacement needed, ability to reset temp permit link
 - List of system generated transfer request, approval or declined email issued to customer and ability to resend it at click of button
 - Gift Cards
 - Any gift cards ordered by customer and respective details
 - Ability to edit gift card details – recipient last name and postal code
 - Indicate if gift card was redeemed and what order redemption is associated with
 - Ability to cancel gift card if was not redeemed (Manager level access only)
 - Call history (integrate with GoTo Connect cloud phone system)
 - Email integration so all email communications can be viewed in their account. Perhaps even sending/exchanging emails from in their profile.
3. Permit Order search
- Like what we currently have in Admin
 - When click on permit info, taken to full purchase details in customer profile
4. Gift Cards
- Similar to what we currently have in administration
 - When click on gift card info, taken to full purchase details in customer profile to edit last name, postal code or cancel unredeemed gift card
 - Ability to de-activate gift cards from previous season (may not be needed if date restriction only allows gift cards purchased after X date, but needs to be updated yearly)
5. Transfers
- Similar to what we currently have in Admin – list of transfers pending and ability to approve or decline
 - Lists of previously completed, approved, and declined transfer requests
 - Add ability to search by transfer id or email address
6. Special Event Permits
- Ability for us to add, edit or remove Special Event permits to current season
7. Reporting
- Orders paid for but not yet sent to DCM
 - Ability to “push permits” through to DCM that get held up or don’t automatically go for fulfillment through the normal process (exceptions)
 - List of permit numbers replaced with another permit via transfer/replacement process
 - Stats on permits, MDs, special event permits, transfers, etc.
 - By season, we are required to pull reports which include date of purchase, \$ amount, permit number (original or new), purchase details (name, vehicle etc.) for all types of permits sold.

Customer Facing Functionality

When customer logs in, provide them with easy access to the various sections of their account as currently they must complete each tab to get to where they need to go. These options can be grouped as below and include:

1. Contact Information
 - View/edit profile
2. Ontario Snowmobile Trail Permits
 - Orders & their status of Order for Current Season including permits, transfers, replacements. For Tracked Shipping, a link to track the shipment directly from the system.
 - *Note – if possible, access to the emails issued from the system (order confirmation, shipping notification etc.) this would significantly reduce the CS inquiries to find emails in Outlook and resend.*
 - Add, edit registered snowmobiles
 - Buy Permit
 - Transfer Permit
 - Replace Permit
3. OFSC Gift Card
 - Gift Card Orders for Current Season (include status of gift card – redeemed, unredeemed)
 - Buy Gift Card
 - Edit Gift Card
 - Redeem Gift Card
4. Contact Us
 - Add link to contact Customer Service on all pages (links to permits@ofsc.on.ca)
5. Other Enhancements
 - Add messaging/functionality to help prevent customers from locking themselves out of Moneris if had 3 failed payment attempts
 - If more than one replacement, transfer and a replacement permit ordered within x hours of each other (because they can only be done one at a time), amalgamate so shipped together and only tracked shipment cost charged once
 - Add address lookup as most sites utilize to reduce the errors and returns. User enters some piece of address and then can only select from a list ensuring that only valid addresses are accepted in the system.
 - Add information icons throughout that, when clicked on, could provide instructions or FAQ type info

TECHNICAL SPECIFICATIONS

System and code is owned by the OFSC, and should be written in a common coding language

RFP & PROJECT TIMELINE AND DELIVERABLES

March 17, 2023	Bid submission deadline (5:00pm EST)
March 21, 2023	Short listed candidates notified and invited to present
March 22 – 29, 2023	Short listed candidate presentations to OFSC
March 30, 2023	Vendor selection and notification
April 1, 2023	Project commencement

PROPOSAL SUBMISSIONS AND INQUIRIES

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