

# Fishing Intelligence™ — Phase 1 QA use cases

**Audience:** QA

**What this is:** What customers and operators can do today, and what to check.

**What this is not:** How the product is built. Ignore internals. Test the journeys below.

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## What Phase 1 delivered

Phase 1 adds a **customer product** next to the existing **Ciright operator product**.

Two companies can each:

1. Create their own account
2. Create their own workspace
3. Add and prove they own a website
4. Install a tracking snippet on that site
5. See **only their own live visitors** as fish in Live Ocean

They must never see each other's sites, team, settings, or visitors.

Ciright operators keep the same login and Live Ocean they already use. That path is unchanged.

No payment is taken. Plans exist so limits can be tested. Fake / demo fish must **never** appear in a customer ocean.

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## Two products — do not mix them

|                            | Ciright operators                                              | Fishing Intelligence customers                                                      |
|----------------------------|----------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Who                        | Internal / Ciright reps                                        | Independent customers                                                               |
| Sign-in page               | /login                                                         | /signin                                                                             |
| Create account             | Not here                                                       | /signup                                                                             |
| After login                | Existing Live Ocean (/live-ocean)                              | Workspace home (/app), then customer Live Ocean (/app/ocean)                        |
| What they see in the ocean | Live Ciright / Nexa visitors (demo fish may still appear here) | Only real traffic from <b>their</b> verified sites. Empty ocean until that happens. |
| Chat with visitors         | Yes (existing)                                                 | No in Phase 1                                                                       |

**Wrong login is a fail.** Ciright credentials must not work on /signin. A customer account must not work on /login.

Use a private / incognito window when testing both products on the same computer.

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## Pages QA will use (customers)

| Page           | Address         | Purpose                                                      |
|----------------|-----------------|--------------------------------------------------------------|
| Sign up        | /signup         | Create a customer account                                    |
| Sign in        | /signin         | Sign in as a customer                                        |
| Verify email   | /verify-email   | Opens from the email link                                    |
| Reset password | /reset-password | Request a reset, then set a new password from the email link |
| Accept invite  | /accept-invite  | Join a workspace from an invitation link                     |

| Page             | Address           | Purpose                                              |
|------------------|-------------------|------------------------------------------------------|
| Create workspace | /onboarding       | First-time: name the organization and pick a plan    |
| Workspace home   | /app              | Welcome + setup checklist                            |
| Live Ocean       | /app/ocean        | Watch live visitors as fish                          |
| Websites         | /app/websites     | Add sites                                            |
| Website detail   | /app/websites/... | Verify domain, copy snippet, pause / resume / rotate |
| Team             | /app/team         | Invite, change role, remove, revoke invite           |
| Plan             | /app/subscription | See limits and change plan (owner only, no charge)   |
| Settings         | /app/settings     | Workspace timezone                                   |

Header also has: switch workspace (if the person belongs to more than one), **New org**, Ocean, Team, Sites, Plan, Settings, Sign out.

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## Emails during testing

Real email sending is not the Phase 1 customer experience yet.

After sign-up, password reset, or invite, the screen may show a **development link**. Use that link as if it arrived in email.

Check that:

- The same message is shown whether the email exists or not (password reset must not reveal if an address is registered).
- A used or expired link fails with a clear message.
- After verify-email succeeds, the person can sign in.

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## Happy path (must pass)

This is the main Phase 1 story. Run it twice with **two different companies** (two emails, two workspaces, two sites).

### 1. Create a customer account

1. Open /signup.
2. Enter name, email, password.
3. Account is created and the person is signed in.
4. They are sent to create a workspace (/onboarding), not to Ciright Live Ocean.

**Also try:** signing up with an email that already exists — should be refused.

### 2. Verify email

1. Open the verification link from the sign-up screen.
2. Message confirms the email is verified.
3. Workspace home no longer warns that email is unverified.

### 3. Create a workspace

1. On /onboarding, name the organization and pick a plan (Free is fine).
2. After submit, they land in the product (websites), not still on onboarding.
3. Workspace home (/app) shows their name, email, organization name, and role **owner**.

4. Setup checklist: organization created is done; the other steps are still open.

#### 4. Add a website

1. Open Websites.
2. Add a name and domain (for example example.com).
3. They land on that site's detail page.
4. Status shows the domain is **not verified** and **tracking is off**.
5. Copying the snippet is possible, but traffic must **not** count until the domain is verified.

Members and viewers must **not** see the Add website form. Owners and admins must.

#### 5. Prove they own the domain

Two methods are offered. There is **no** "upload an HTML file" option.

**DNS:** Show instructions → they get a host and a value to add as a TXT record → Check now.

**Meta tag:** Show instructions → they get a tag to put in the homepage → Check now.

Expected:

- Before the record / tag exists, Check now fails and the site stays unverified.
- After it exists, Check now succeeds, status becomes verified, tracking turns on.
- The same domain cannot be verified by a **second** company if the first already verified it. The second company gets a clear failure.

You need a domain you can edit (DNS or homepage) to finish this step. Without that, still test that instructions appear and that Check now fails when nothing is published.

#### 6. Install tracking and see the first visitor

1. On the verified site, copy the snippet.
2. Paste it on that real website (every page you want to count).
3. Open /app/ocean and keep it open.
4. Visit the tracked site in another tab / device.
5. A fish appears for that visit. Clicking the fish shows the domain and activity.
6. Workspace checklist marks "See the first visitor" done.

**Empty ocean is correct** until real traffic arrives. There must be **no** fake fish to fill the scene.

If setup is incomplete (no site, or site not verified, or snippet never installed), Live Ocean shows a short setup list and a link to finish — not a fake ocean.

#### 7. Sign out and sign back in

1. Sign out.
2. They land on /signin, not /login.
3. Sign in with the same email and password.
4. They return to their workspace, same organization, same sites.

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### Account and session use cases

| #  | What to do                 | What should happen |
|----|----------------------------|--------------------|
| A1 | Open /app while signed out | Sent to /signin    |

| #  | What to do                                     | What should happen                                                                                             |
|----|------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| A2 | Open /login as a customer                      | Ciright login only — customer account does not get in                                                          |
| A3 | Open /signin as a Ciright operator             | Customer sign-in only — Ciright credentials do not get in                                                      |
| A4 | Forgot password with a <b>registered</b> email | Same generic “if that email is registered...” message; development link appears; new password works on /signin |
| A5 | Forgot password with an <b>unknown</b> email   | Same generic message; no hint that the email is unused                                                         |
| A6 | Set a new password, then try the old one       | Old password fails                                                                                             |
| A7 | Open a reset link twice                        | Second use fails                                                                                               |
| A8 | Stay signed in, refresh /app                   | Still signed in                                                                                                |

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## Websites and tracking use cases

| #  | What to do                                                               | What should happen                                                                                                                                |
|----|--------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| W1 | Add the same domain twice in one workspace                               | Refused                                                                                                                                           |
| W2 | Add a site, do <b>not</b> verify, then browse that site with the snippet | No fish in that company's ocean                                                                                                                   |
| W3 | Verify, then <b>Pause tracking</b> , then browse the site                | No new visitors appear                                                                                                                            |
| W4 | <b>Resume tracking</b> , then browse again                               | New visitors appear again                                                                                                                         |
| W5 | <b>Rotate site id</b>                                                    | A new snippet is shown. Old snippet must stop sending into this workspace. Ocean goes back to waiting until the new snippet is installed and used |
| W6 | Member or viewer opens website detail                                    | They can see status and snippet. They cannot verify, pause, resume, or rotate                                                                     |
| W7 | Include subdomains is checked by default when adding a site              | Confirm the checkbox is on unless the tester turns it off                                                                                         |

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## Live Ocean use cases (customers)

| #  | What to do                                               | What should happen                                             |
|----|----------------------------------------------------------|----------------------------------------------------------------|
| O1 | Open /app/ocean before a site is verified                | Setup checklist, no fish, no demo scene                        |
| O2 | Verified site, snippet installed, no visits yet          | “Waiting for the first visitor” and the snippet, not fake fish |
| O3 | Two visitors from the same company                       | Two fish (or updated activity), only that company's traffic    |
| O4 | Company A has live visitors; Company B opens their ocean | Company B does <b>not</b> see Company A's fish                 |
| O5 | Click a fish                                             | Side panel: domain, pages, time on site. Close works           |
| O6 | Sign out from the ocean header                           | Lands on /signin                                               |

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## Team use cases

Roles: **owner**, **admin**, **member**, **viewer**.

| #   | What to do                                                          | What should happen                                                                 |
|-----|---------------------------------------------------------------------|------------------------------------------------------------------------------------|
| T1  | Owner invites a new email as member                                 | Invitation appears as pending. Development link is shown                           |
| T2  | Invited person is <b>not</b> signed in, opens the link              | Asked to sign in or create an account with <b>that same email</b> , then they join |
| T3  | Invited person already has an account, is signed in, opens the link | They join and can open the workspace                                               |
| T4  | New person creates an account from the invite                       | They skip needing a second workspace; they land in the invited one                 |
| T5  | Owner or admin changes a member's role                              | Role updates. Owner's own role cannot be changed this way                          |
| T6  | Owner or admin removes a member                                     | That person can no longer open this workspace                                      |
| T7  | Owner or admin revokes a pending invite                             | That link no longer works                                                          |
| T8  | Member or viewer opens Team                                         | They see the list. They cannot invite, change roles, remove, or revoke             |
| T9  | Invite when the plan is already at the team limit                   | Clear error. Pending invites <b>count</b> toward the limit                         |
| T10 | Invite the same email twice while one invite is pending             | Refused                                                                            |

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## Plan and limits use cases

Plans in Phase 1 (no card is charged):

| Plan         | Websites | Team (people + pending invites) | Events / month |
|--------------|----------|---------------------------------|----------------|
| Free         | 1        | 2                               | 5,000          |
| Starter      | 1        | 2                               | 25,000         |
| Professional | 10       | 15                              | 500,000        |
| Enterprise   | 50       | 50                              | 2,000,000      |

| #  | What to do                                               | What should happen                                                     |
|----|----------------------------------------------------------|------------------------------------------------------------------------|
| P1 | Open Plan                                                | Current plan, usage vs limits, list of plans                           |
| P2 | Owner selects another plan                               | Plan updates. Message that billing is <b>not</b> charged in this phase |
| P3 | Admin / member / viewer tries to change plan             | They cannot. Message that only the owner can                           |
| P4 | On Free, add a second website                            | Refused because of the website cap                                     |
| P5 | On Free, owner + one invite already, send another invite | Refused because of the team cap                                        |
| P6 | Owner upgrades to Professional, then adds a second site  | Allowed                                                                |
| P7 | Workspace home / Plan still match after switching plan   | Limits and "current plan" match the new choice                         |

Hitting the monthly event cap is hard to test by hand (thousands of page views). If the team provides a way to simulate it: further visits must stop counting and the ocean must not keep growing from those extra hits.

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## Several workspaces (one person)

| #  | What to do                                                  | What should happen                                                           |
|----|-------------------------------------------------------------|------------------------------------------------------------------------------|
| M1 | From the header, <b>New org</b> , create a second workspace | Person now has two organizations                                             |
| M2 | Switch the workspace dropdown                               | Sites, team, ocean, settings, and plan belong to the selected workspace only |
| M3 | Add a site in workspace 1, switch to workspace 2            | That site is gone from the list. Ocean is empty / that other company's setup |
| M4 | Accept an invite to someone else's workspace                | That workspace appears in the switcher                                       |

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## Settings

| #  | What to do                                            | What should happen                                   |
|----|-------------------------------------------------------|------------------------------------------------------|
| S1 | Change timezone and save                              | "Settings saved." Value is still there after refresh |
| S2 | Change timezone in workspace 1, switch to workspace 2 | Workspace 2 still has its own timezone               |

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## Isolation (highest priority)

Use two browsers or one normal + one incognito.

**Company A:** Alice, workspace "Harbor", site she verified.

**Company B:** Bob, workspace "Reef", different site.

| #  | What to do                                                         | What should happen                                                     |
|----|--------------------------------------------------------------------|------------------------------------------------------------------------|
| I1 | Alice looks at Websites                                            | Only Harbor sites                                                      |
| I2 | Bob looks at Websites                                              | Only Reef sites                                                        |
| I3 | Alice opens Live Ocean while Bob's site has traffic                | Alice never sees Bob's visitors                                        |
| I4 | Alice opens Team                                                   | Only Harbor people                                                     |
| I5 | Alice opens Settings / Plan                                        | Only Harbor name, timezone, plan, usage                                |
| I6 | Alice tries to open Bob's website page by guessing / pasting a URL | She does not see Bob's site (error or "not found", never Bob's data)   |
| I7 | Ciright operator is signed in at /login                            | Customer /app still requires /signin. Operator Live Ocean is unchanged |

If any data from the other company appears, **fail the build**.

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## Ciright operator check (must still work)

Do this on the **existing** operator path, not /signin.

1. Open /login and sign in with Ciright credentials.
2. Reach the usual Live Ocean.
3. Existing visitor / chat behavior still works.
4. Signing out still goes to the Ciright login, not the customer sign-in.
5. Creating a customer account on /signup does not break this path.

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## What Phase 1 does not include (do not log as bugs)

- Paying by card, invoices, receipts
- Customer visitor chat or video
- Alerts screens, visitor lists, session lists
- Uploading an HTML file to prove the domain
- Deleting an organization
- Changing password while already signed in (forgot-password email is the way)
- Fake fish in a **customer** ocean (that is intentional)
- A super-admin console

If something in this list is missing, it is out of scope, not a Phase 1 defect.

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## Suggested test order

1. Ciright /login still works (so we did not break operators).
2. Full customer happy path for Company A, including a real visitor in /app/ocean.
3. Full customer happy path for Company B.
4. Isolation checks I1–I7.
5. Team invite + roles.
6. Pause / resume / rotate snippet.
7. Plan change and Free caps.
8. Password reset and email verify.
9. Two workspaces for one person.

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## Pass / fail for Phase 1

**Pass** if:

- A new customer can go from sign-up → workspace → verified site → snippet → live fish.
- A second customer can do the same and never sees the first customer's world.
- Ciright operators still sign in at /login and use their existing ocean.
- Customer ocean never shows demo fish.
- Plan limits and team roles match the tables above.

**Fail** if:

- Either login is mixed up (/login vs /signin).
- Any company can see another company's sites, people, or visitors.
- Customer ocean is filled with fake fish.
- Tracking counts before the domain is verified, or while paused.
- Ciright operator flow is broken.