

Toolbar  
design  
brief

2008

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Introductory information on the design requirements of this relatively complex project: intelligent robot/form filler IE and Firefox toolbar system.

## **Toolbar developer design brief**

This project involves the development of a beta status system; comprising IE and Firefox compatible toolbars, user database system and consumer review site.

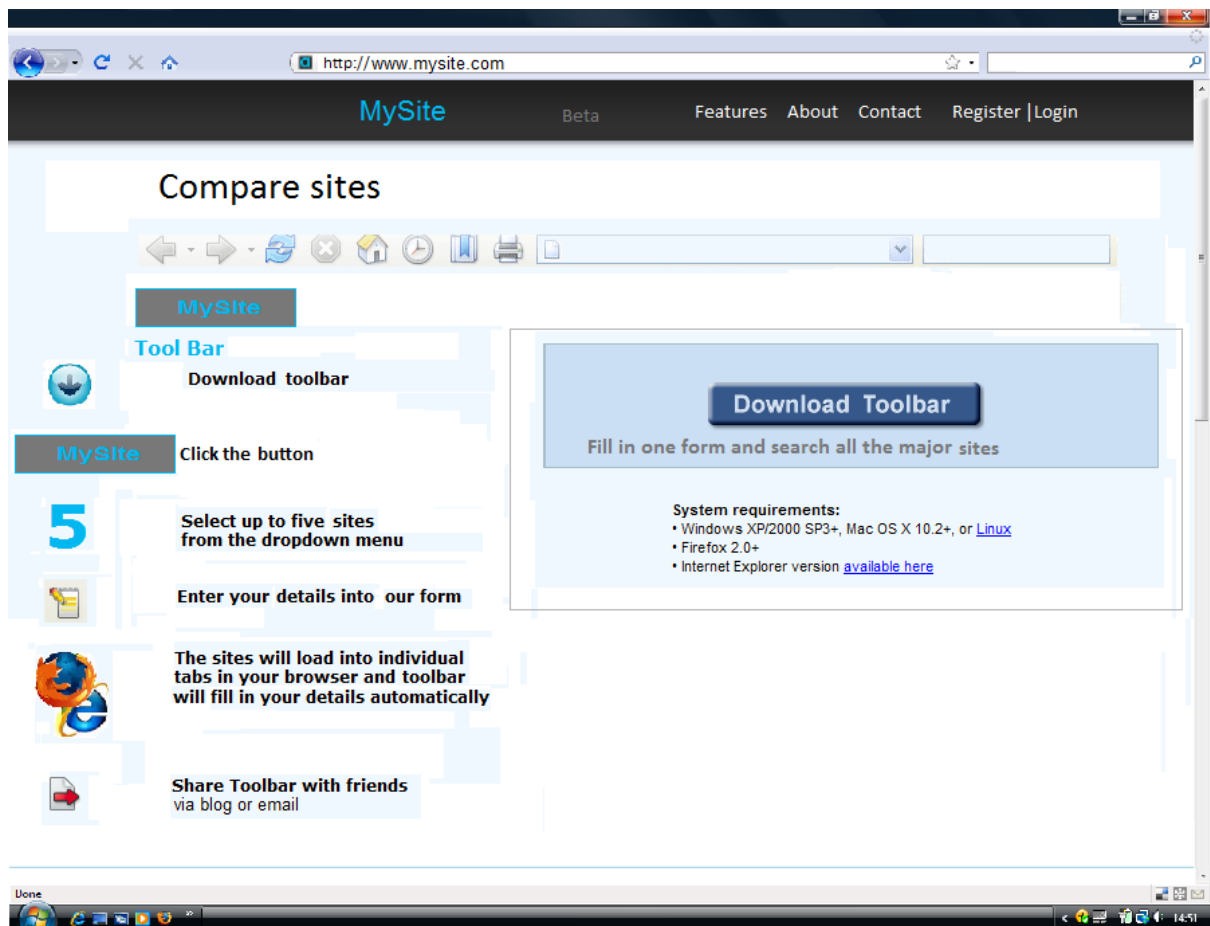
The tool will need successive updates to facilitate:-

- any change to the data entry on the associated sites that require changes to the forms and robots stored in the toolbar program/website
- Or the addition of sites that requires an update to allow the user to access them.

As a result there is the potential for the relationship to be ongoing for successive updates and versions.

## Intelligent robot/form filler toolbar application

**Description:** Consumer downloads the toolbar to enable faster, easier access to multiple sites that require them to enter similar data to obtain search results (e.g. insurance companies etc.)



Landing Page

## **Design brief:**

- Mozilla Firefox and Microsoft Internet Explorer compatibility are essential.
- Links to external sites through affiliate tracking links
- Also create button for Google button gallery to aid distribution

## **Required:**

All pages described in this document

- Home/Download Page
- Login/Registration Page
- Details entry pages for each form to load into
- User account pages (that store details of previous searches and allow repeat/edit search at later date)
- Administration page (accessible by administrator –delete users, extract data etc.)
- Contact Page (with contact information and contact form)
- About Us
- Features (information and “Take a tour” Flash Video see stumbleupon.com)
- Help Page (contact form for users to contact us)
- Press (Press contact details and lists press coverage)
- Disclaimer, Terms and Conditions and Privacy Policy (provided by us)

## **Important**

We will require:-

- The rights to all intellectual property of the project;
- The source code.

## How it should work:

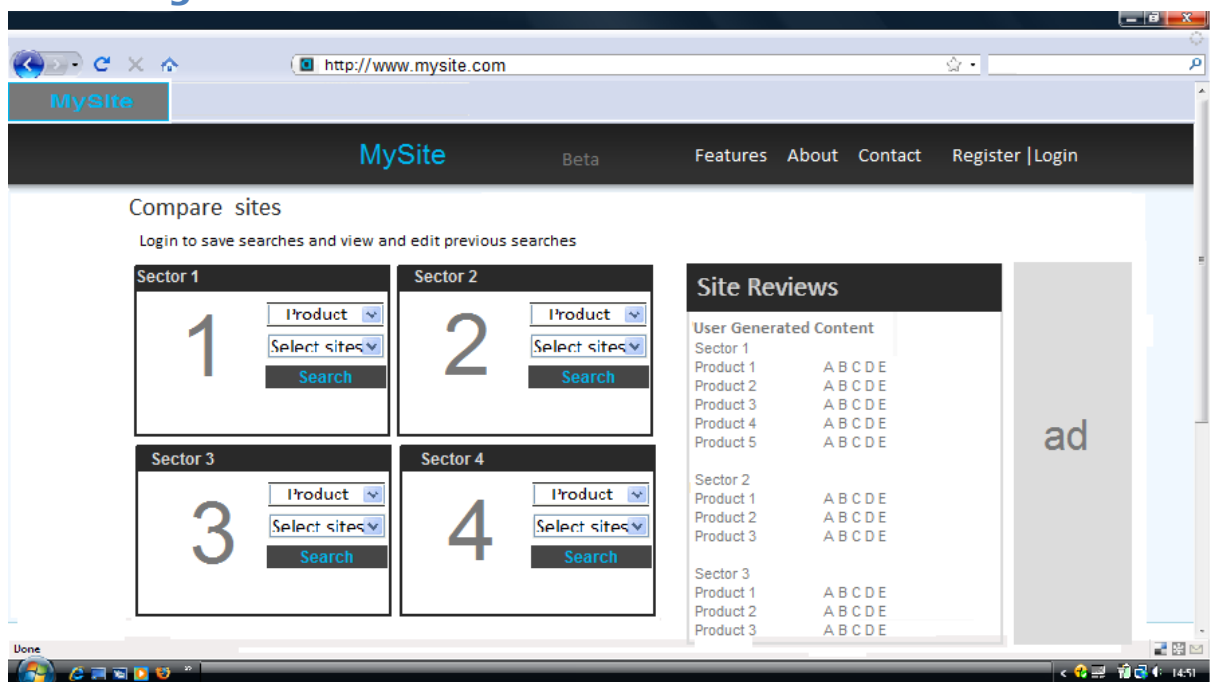
### 1 Product and Site selection

MySite

This design is for illustrative purposes only; however it does provide useful insight into the functional direction we are aiming for.

- Having installed the toolbar User clicks “Mysite” button
- The Start Page is loaded into the browser

### Start Page

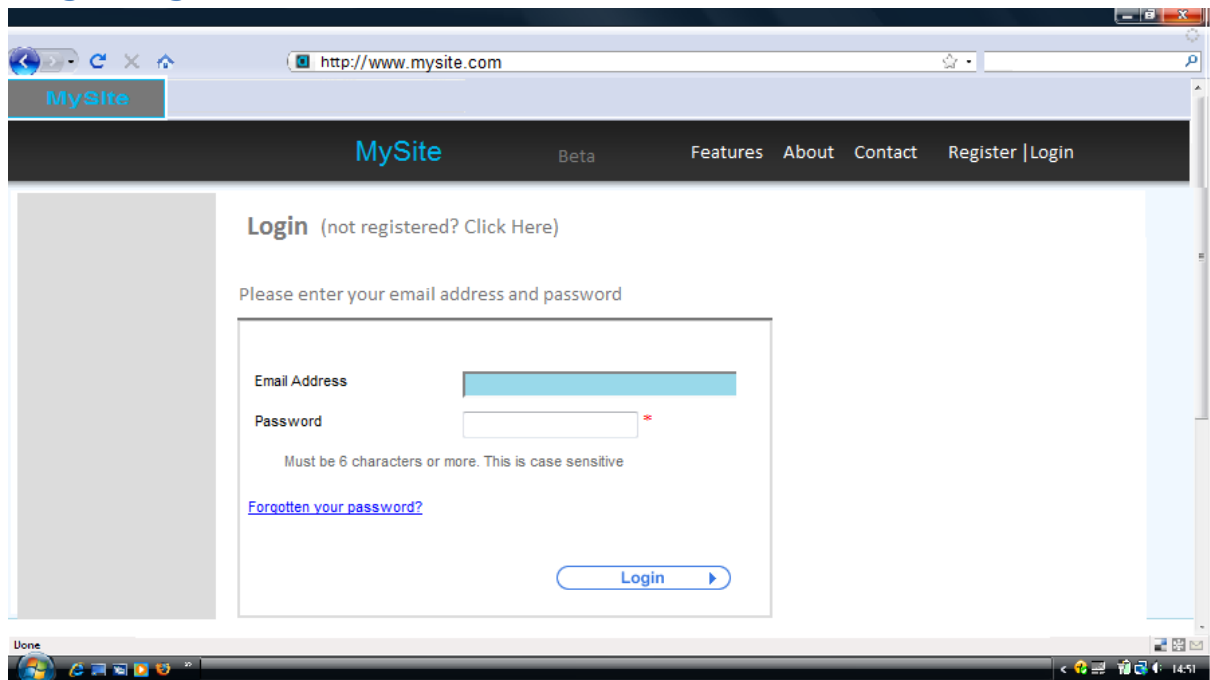


The start page allows the user to:-

- log-in to an account to retrieve or edit previous search details;
- Perform a search without an account; whereby, there is full functionality however they cannot save their searches.
- Read the user generated reviews of sites

The user chooses the product they desire from the product drop down menu, they then select up to 5 sites from the site drop down menu and click the Search button.

## Login Page



The screenshot shows a web browser window with the address bar displaying 'http://www.mysite.com'. The page header includes the 'MySite' logo and navigation links for 'Beta', 'Features', 'About', 'Contact', 'Register', and 'Login'. The main content area is titled 'Login (not registered? Click Here)' and contains the instruction 'Please enter your email address and password'. Below this, there is a form with two input fields: 'Email Address' and 'Password'. The 'Password' field has a red asterisk next to it and a note below it stating 'Must be 6 characters or more. This is case sensitive'. A blue link 'Forgotten your password?' is positioned below the password field. At the bottom of the form is a blue 'Login' button with a right-pointing arrow. The browser's taskbar at the bottom shows the 'Done' status and a system tray with the time '14:51'.

- Users should be able to sign up for an account if they do not already have one. This requires them to enter their email address and password only. When a user signs up for an account they should receive an automatic welcome email message containing their login details.
- When the user is logged in to an account the toolbar should automatically store details of their search activity on their account.

## Products

There are 4 product sectors.

### Sector 1

Within this sector there are 5 product lines:

- **Product 1** - 8 sites this means that the robots in the toolbar must use the form to gather all information required to automatically enter the required details into 8 slightly different forms on each of these sites.
- **Product 2** - 8 sites
- **Product 3** - 3 sites
- **Product 4** - 8 sites
- **Product 5** - 5 sites

## Sector 2

Within this sector there are 4 product lines:

- **Product 1** - 5 sites
- **Product 2** - 3 sites
- **Product 3** - 3 sites

## Sector 3

Within this sector there are 3 product lines:

- **Product 1** - 9 sites
- **Product 2** - 9 sites
- **Product 3** - 9 sites

These searches are all essentially the same details across the same set of sites.

## Sector 4

Within this sector there are 4 Product Lines:

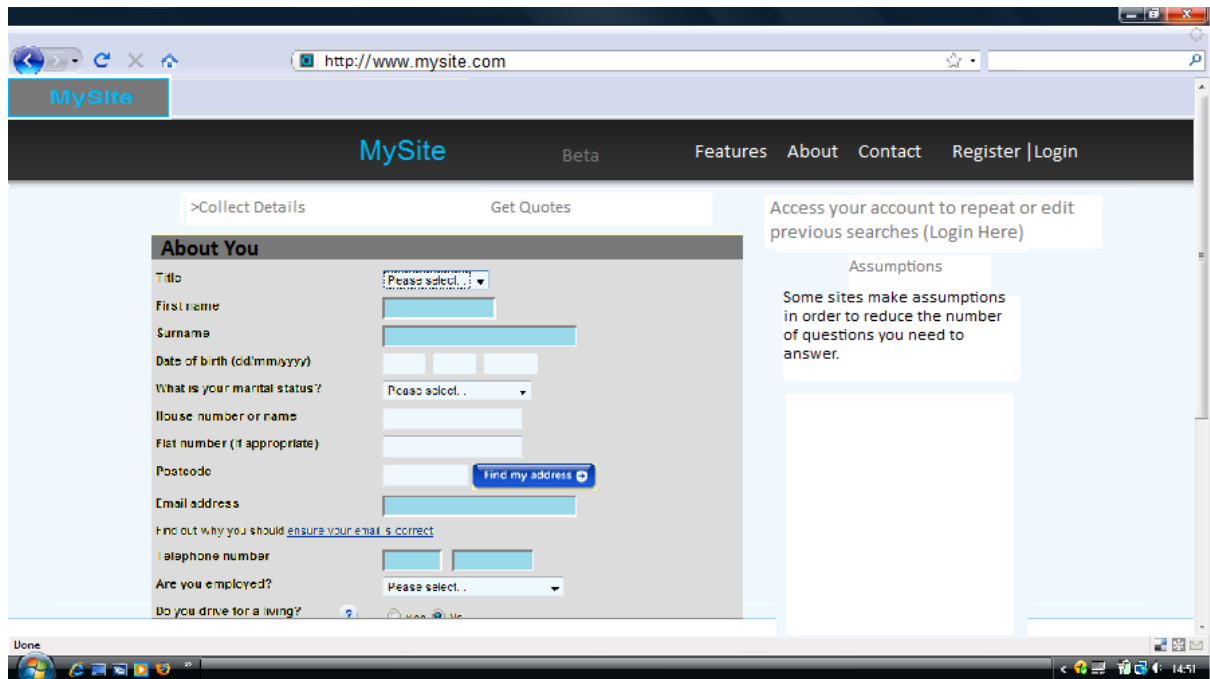
- **Product 1** - 3 sites
- **Product 2** - 3 sites
- **Product 3** - 3 sites

These searches are all essentially the same details across the same set of sites.

- **Product 4** - 5 sites (This is the same as Sector 1 Product 5)

## 2 Search Details Entry

The user selects the desired product and sites from the start page. loads a one size fits all form\*, containing all the information required for each site, for that particular product.



The screenshot shows a web browser window at <http://www.mysite.com>. The page has a dark navigation bar with the MySite logo, 'Beta' status, and links for 'Features', 'About', 'Contact', 'Register', and 'Login'. Below the navigation bar, there are two tabs: '>Collect Details' (active) and 'Get Quotes'. The main content area features a form titled 'About You' with the following fields:

- Title: Please select...
- First name: [text input]
- Surname: [text input]
- Date of birth (dd/mm/yyyy): [text input]
- What is your marital status?: Please select...
- House number or name: [text input]
- Postcode: [text input] with a 'Find my address' button.
- Email address: [text input] with a link: 'Find out why you should [ensure your email is correct](#)'.
- Telephone number: [text input]
- Are you employed?: Please select...
- Do you drive for a living?: [text input]

On the right side of the page, there is a section titled 'Assumptions' with the text: 'Some sites make assumptions in order to reduce the number of questions you need to answer.'

The user fills in the form. Clicks "Send Details" button.

The robot technology in the toolbar uses the details to search the selected sites.

Details are stored on our server under a user assigned profile. The User is required to enter an email address and password. The profile is made using this information.

## **The Forms**

Each site has a slightly different application form for forms covering product lines within the same sector.

We need to produce a one-size fits all form for each product line.

### **Required:-**

The form must cover all details required by all the sights covered in the search.

Where there are questions that mean the same thing; however, are phrased differently the form includes the most general version of the question. (the user can click a “?” to be displayed the different questions in their original form).

Where the input is a synonym across different forms (e.g. an occupation referred to by a different name on different forms) the form needs to provide all the options separated by forward slashes. When entering the information into the different sites the toolbar must recognise the site and enter the information accordingly.

## **Robot Access to the sites**

It is ESSENTIAL that the toolbar contains the robot technology on the users' computer, rather than using the technology remotely on our servers.

### **Things to consider:**

#### **Site used previously (before installing the toolbar)**

Many sites require the input of an email address and password. If the site has previously been used with those details (email address and password) the user is required to login. The result is that the process for making an application differs depending on whether or not the user has previously used the site independently (i.e. not through the toolbar).

The robot needs to be able to recognise such issues and enter details as required to complete a quote application for the requested product.

## Find my....

The sites often request that a user finds something they have specified

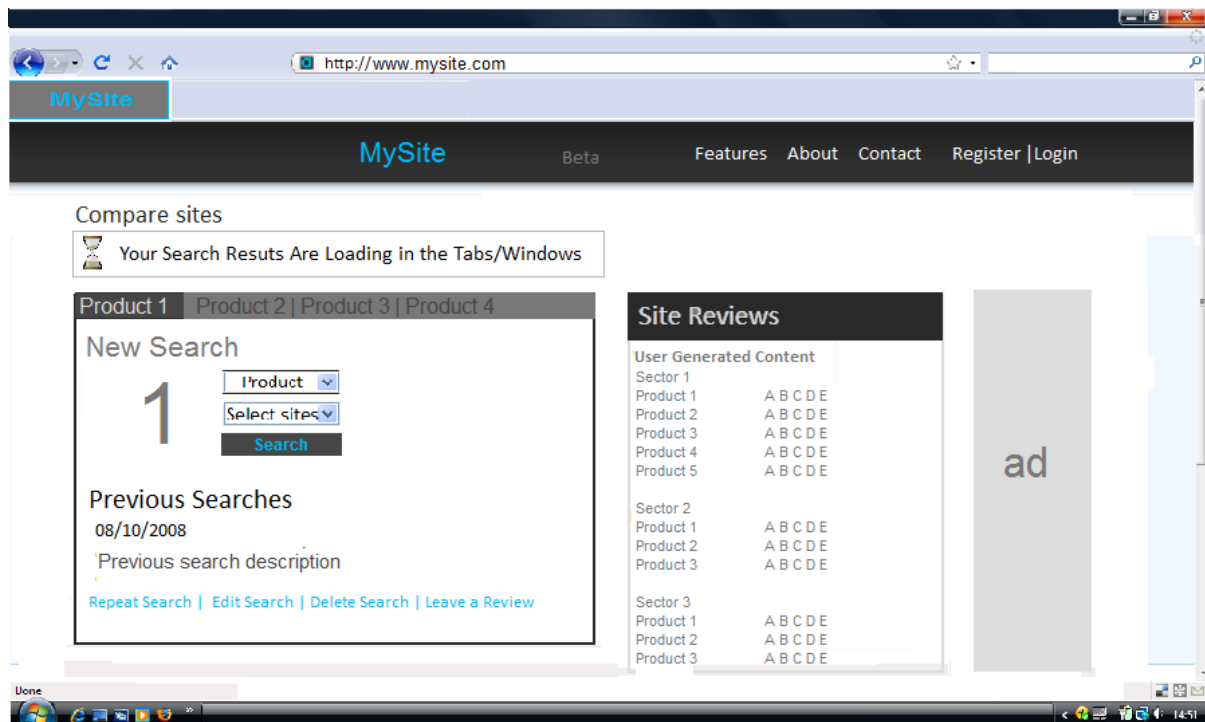
e.g. a user must requested to enter their post code and press a button to “find their address”. The form produces a list of addresses in their street. The user must then pick their address.

e.g. user must enter their car registration and press a button and press “find my car”. The user then has to select their vehicle from the list that is generated.

**The robots need to be able to enter the required details and find the requested information from the produced field.**

### 3 Loading/Search in Progress

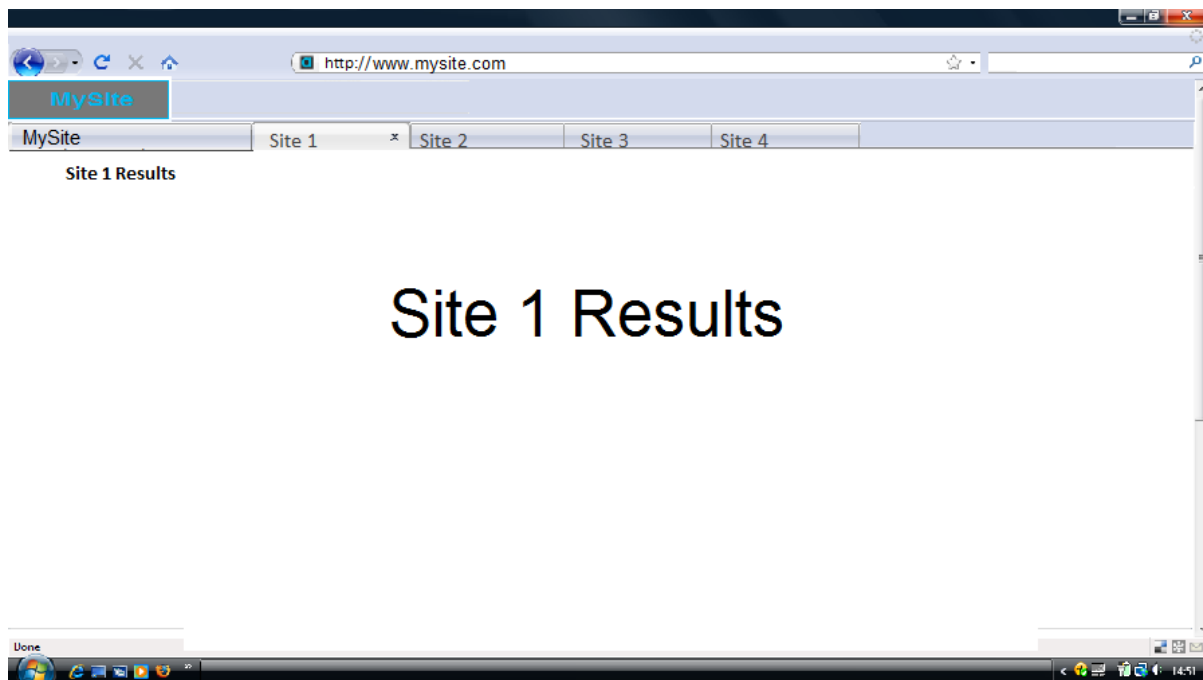
The user fills in the one size fits all form for the requested product. When they hit “send details” the toolbar uses the details to search through the requested sites. The current tab opens either an account or non account user control panel. From here they can perform a variety of tasks e.g. new search, edit or repeat the previous searches or leave a review of the sites searched.



- If the user is logged into an account this page should display all previous searches saved to their account profile. From this page they can start a new search, repeat edit or delete and a previous search or leave a review.
- If the user is not logged into an account it should only display searches from this session. Once they stop using the page these searches are deleted. From this page they can start a new search, repeat edit or delete and a previous search (from this session) or leave a review.
- The account page is sorted by product sector (see picture)
- As previous the toolbar is required to perform any search. As a result we maintain the criteria that the search originates from the users IP rather than from our servers. When the user requests to repeat a search the form is loaded to the toolbar and the search is performed as before.

- When the user chooses to edit search the form is loaded in the browser and the user is able to see all of the completed fields and can edit as desired.

## 4 Results Pages



- The toolbar accesses the form that has been created and fills out the sites automatically from the data in the one size fits all form and delivers the results pages each in a separate browser tab
- **The toolbar needs to support “tabbed browsing” where it is available i.e. IE7 and Firefox. Where it is not i.e. IE6 we want the toolbar to open each page in a new window.**
- It needs to be engineered so that they are not viewed as popups and blocked by the browser.

### Required:

- The transmission of the personal details to our servers is secure (SSL type encryption between user and our server).
- The file size for the toolbar is kept to a minimum.\*
- Toolbar accesses the website along a path which follows an affiliate link
- The operation occurs from the user’s computer i.e. the robots access the external sites from the user’s IP address.
- We require all rights to the toolbar design (intellectual property etc.) and source code.



## 5 Advertising and Affiliate Links

The site aims to earn advertising and affiliate revenue.

### Advertising

<b>Web Page</b>	<b>Advertising</b>
<b>Homepage/Download page</b>	Top Banner
<b>Details Entry Page</b>	Top Banner, Right side skyscraper or multiple buttons
<b>Results Page</b>	No advertising (displays results in original context)
<b>Login Page</b>	Top Banner, Right Side Skyscraper or multiple buttons
<b>User Account Pages</b>	Top Banner, Right Side Skyscraper or multiple buttons
<b>User Review Pages</b>	Top Banner, Right Side Skyscraper or multiple buttons

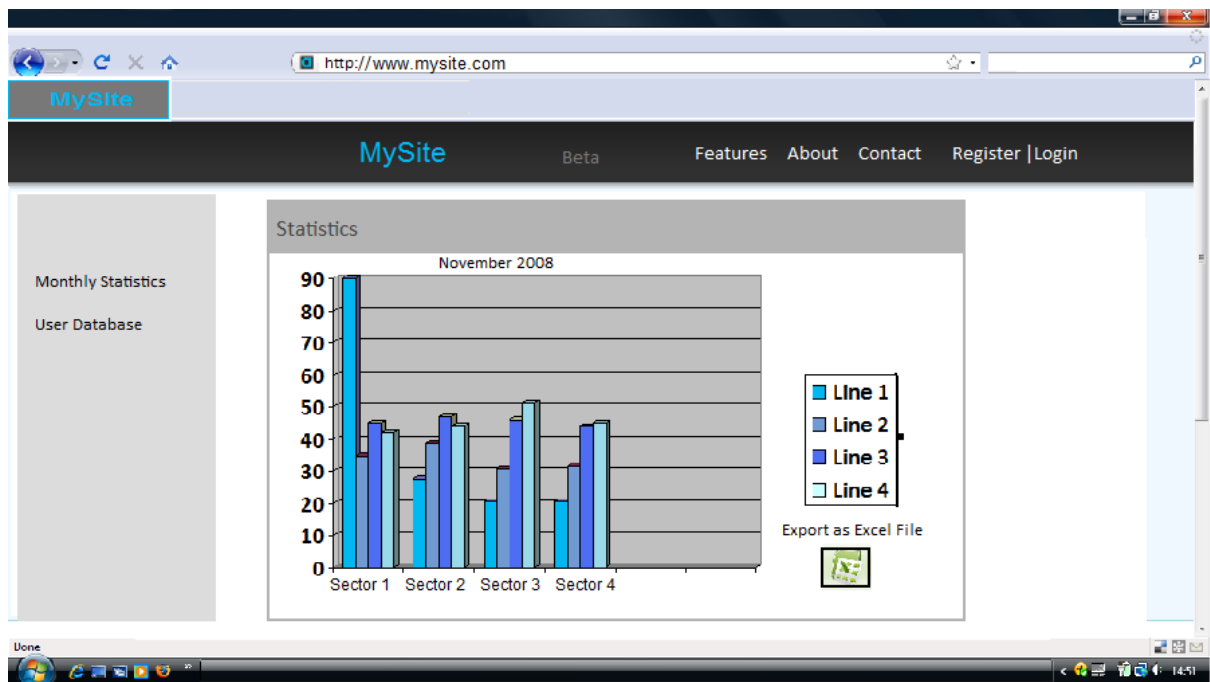
### Affiliates

The toolbar will operate through affiliate tracked links.

At this moment in time we have affiliate agreements with several networks.

We have access to affiliate banners, links and can create deep links etc. We will provide you with the information required on request.

## 6 Administration and Performance Management



This should only be accessible by an administrator.

We would like to be able to extract the email address from the database of profiles/accounts to allow for an opt-in Newsletter and other contact.

We would like a system for monitoring:-

- Number of toolbars downloaded
- Number of searches by sector and product line
- Number of times each site is used in a search by product line

All of this should be exportable.

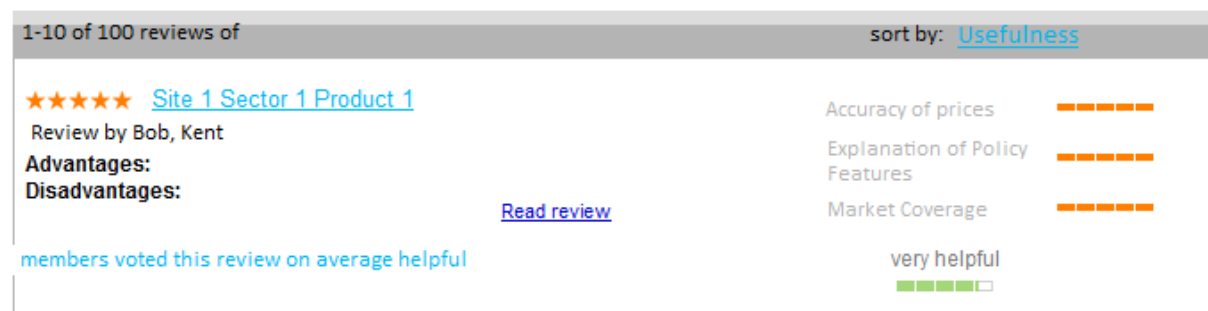
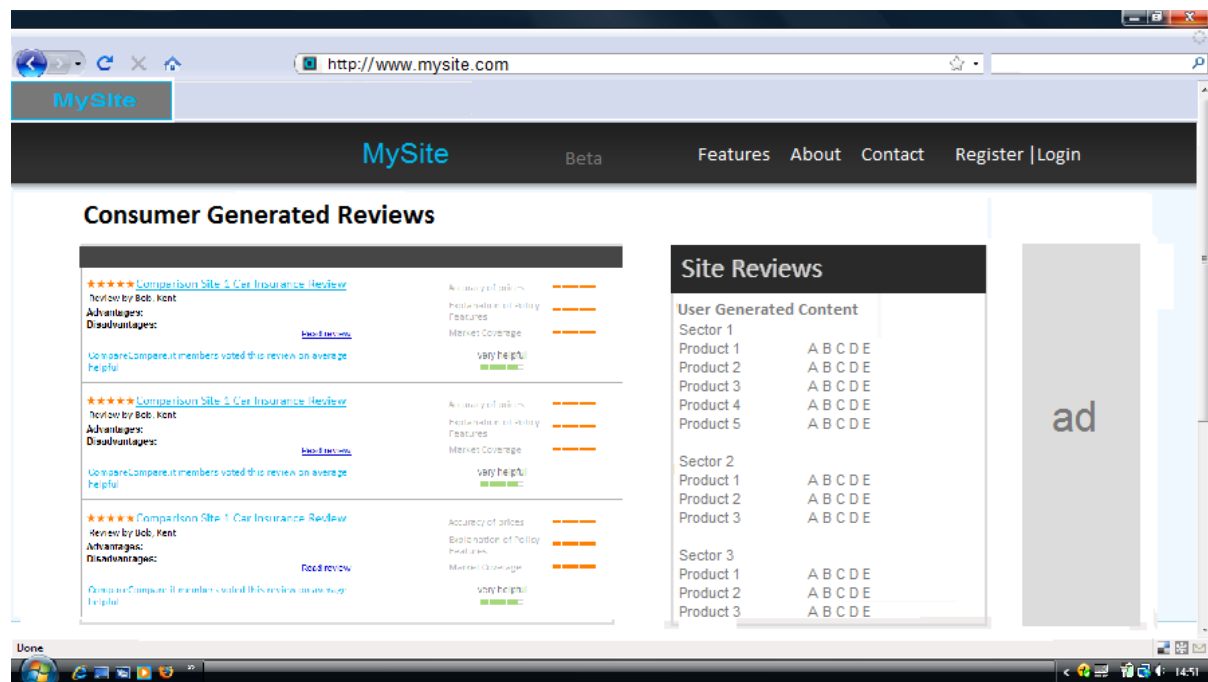
Extractable name, address and email address from user database

- Extractable for use in mailing list.

## 7 Software Updates

- When users arrives at the start page they should be prompted to upgrade to the latest version of the toolbar to take full advantage of the service.
- The toolbar should periodically check the version is the most up to date with our servers and upgrade as necessary, automatically (as is currently possible through internet explorer).

## 8 User Generated Reviews



- For each product line there should be consumer generated reviews for the associated websites.
- Consumers can leave comments related to the advantages and disadvantages of each site.
- Consumers rank the sites for accuracy of prices, explanation of product features and market coverage.
- The readers of the consumer generated content can then rate the usefulness of the review.