**Scope of Work for new books site MVP**

To: Qualified development teams or developers

From: JD Lasica and James Rosone, Authors AI

Date: Sept. 16, 2019

**Note to Upwork applicants**

1) We are not certain whether this project is best tackled by a single developer, a pair of developers or a development team, so we put down “2” for the # of freelancers requested.

2) The budget of $17,500 is our estimate of how much a site like this will cost to build, but that figure is flexible, depending on the # of developer hours required, the skill level and the time line required.

3) We are not certain if WordPress, php, Magneto or Python is the best programming language for this project, see below.

**Project description**

Our startup is building an ambitious new retail site with community and social sharing components. We’re not releasing the name just yet, but the tagline is, “The place for book lovers.” We are not selling books directly but linking to book retail sites.

We will have about 100 independent authors on board, showcasing their books on the home page, on various genre landing pages, on each author page and on each separate book page. In addition, we’ll have about 30 email subscription lists tied to various genre and subgenre sections so we can send out specially priced promotions for fans of fantasy, romance, thrillers, sci fi and other genres.

The site will contain a mix of evergreen and freshly updated content – both text and rich media – as well as opportunities for readers to leave comments, reviews and ratings.

**Timeline**

We’d like to get our MVP live by the end of 2019, preferably sooner (end of November 2019?), and are ready to work full time with the right developer(s)/development team to make it happen. We have a designer and technologist/project manager on our team who can interface with you during each sprint.

**Programming language**

We think about 90% of this can be built in WordPress – but we’re not certain. See the deliverables below and let’s discuss what’s feasible. Our gut tells us that building the site in WP will be far faster and less expensive than building a proprietary system, plus it allows us to keep the site updated and use a host of plug-ins.

However, we’re open to different approaches as well, such as php, Magneto, Python or open source frameworks. You’ll see us make several references to Python throughout because we have an existing code base we can borrow from – but that’s only an option.

**A-B testing**

With some of these features, we are open to using A-B testing to see which is the best approach to take with our target audiences, and we’d be pleased to work with you on this.

**Brand identity**

Our brand identity reflects these qualities: trustworthy, discovery, delight, engaging, inclusive, innovative, creative, reader-focused, smart, vetted, high-quality, professional, fun (without being overly quirky), hip, exciting, unpretentious, accepting, accessible, democratic, popular, mass market, entertaining. We’re not branding this as an “indie author” site but as a site for book lovers. Extensive vulgarity, personal insults and ad hominem attacks violate our quality guidelines and will be removed.

**Attracting readers**

We understand the challenge of building a new readership at a new destination site. It’s our goal to:

• closely tie website registrations to an email database we’ll be creating in order to drive tens of thousands of email subscriptions quickly;

• include multiple social hooks on every page so that readers can share content easily and interact with our content on other social platforms.

**Costs and business model**

We are operating as a lean startup with a limited budget and no investment capital apart from money from authors’ membership fees and the founders’ personal funds. That said, we want to create a quality product and service.

As you review this document, please flag items that we may want to reconsider as deliverables if the feature would require a considerable number of developer hours.

**Design elements**

We have a designer with an extensive UI/UX background. The first wireframes and mockups will be finalized the week of Sept. 16, but this document should give you a detailed idea of the site we want to build.

**Audience modeling**

If your company does any related work with audience modeling to target specific audience segments, let us know about those marketing services as well.

**MAIN SECTIONS OF SITE**

• Home page

• Book pages

• Author pages

• Category pages

• Static pages

• User pages/Profile pages.

**Private pages**

• My Favorites (linked to User’s private page of bookmarked items)

• User’s account settings

• to set public Profile page details

• to manage Email subscriptions

• Dashboard for editing content & images (accessible to Admins and Editors only)

**Index to main components of new site**

This is our initial take on what we’d like to build, though it’s not set in stone and we are open to ideas from the development team of what’s doable and what is overly ambitious.

Here are the main sections of the site we’ve identified:

1. Book pages (with 4 tabs)

2. Author pages (with 6 tabs)

3. Home page

4. Category pages

5. Sitewide requirements & back end functions

5A) Registration & Log-in

5B) Permissions and roles

5C) User shortcuts

5D) Heart an item

5E) Share an item

5F) Bookmark an item (Save to My Favorites page)

5G) You might also like (based on Taxonomy structure)

6. Content management system

Manage Content

Image Library

7. User accounts (private) & Profile pages (public)

8. My Favorites page

9. Search & search results page

10. Static page templates

11. Blog

**1. Book pages**

It’s likely that our Book pages will be the most trafficked pages on our site, for both SEO reasons and because we’ll be driving most readers to our Book pages through our email blasts — so these are key pages on the site. Book pages will be a combination of evergreen and new content added by readers and authors (another reason for WP).

With a core group of 100 to 120 authors, it’s our assumption that we can create rich Books and Author pages from the data and content *that the authors have already created* without having to pay for subscription services. We are assuming that we can grab such items as book cover images, book descriptions and certain metadata fields from the media assets and textual information uploaded by the authors on sites such as Amazon, Apple iBooks, Google Play, etc. We are assuming any data scraping can be done legally and that we can hire a small team to do this quickly.

In addition, we may want to use the Amazon Product Advertising API – if needed – to obtain a few elements such as current prices of books. It’s our understanding that there are already plug-ins that tie into the Amazon API.

We don’t need to use or scrape other elements, such as star ratings or review information.

We also want to know whether we’d be able to bring in additional books from authors beyond our core group of 100-120 authors through a legal means such as Amazon’s API. (We are aware that Amazon requires an approval process and wants to see 2-3 retail sales on our site before it enables the API for a new partner.)

Each Book page will have 4 separate tabs:

* **Book Info**
* **Reader Buzz** (#) [note 1]
* **Sample**
* **Media / Trailer** (#) [note 2]

note 1: # = number of reader comments or reviews (no difference in content type)

note 2: # = if any media or book trailers (videos) or podcasts are entered, plus reader comments; display 0 if all are empty

*Appearing across the top of all 4 tabs:*

* Book cover photo – enlarged on mouseover
* Book title
* Series title or subtitle (if any)
* Author name – with accompanying FOLLOW AUTHOR badge and author’s name is linked to Author page
* Star rating – 1 to 5 stars, in half-star increments, rated by our own users
* Flash sale
* Price, with original price struck out
* Date special begins – Field for displaying beginning date of any reduced-price promotion – entered by Author or Editor (leave blank if empty; these fields are valuable if we can’t display the price but will be promoting the book on the home page)
* Date special ends – Field for displaying the end date of any reduced-price promotion (leave blank if empty)
* Buy it now – with horizontal array of etailer buttons:
* Amazon Kindle
* Barnes & Noble
* Apple Books
* Google Play
* Kobo

(Buttons won’t display if title is not available at these stores. Note: We also would like our links to be auto-generated and wrapped in the our affiliate code that we’ll get from each retail partner.)

* Heart and bookmark icons – for Users to heart or save a Book page, detailed below in Section 5
* Social sharing icons – detailed in Section 5
* Section across the bottom of this top page, below the retail buttons, with:
* Genre – manually entered
* Published (date – is this data available anywhere?)
* Length (pages – is this data available anywhere?)

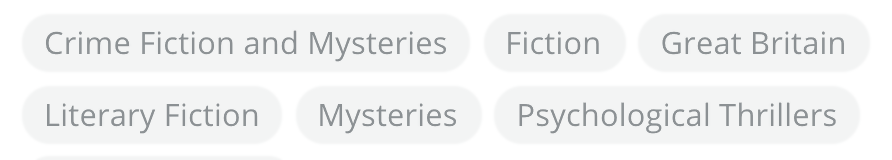
*Tab 1: Appearing on the* ***Book Info*** *tab:*

* One-line tagline, logline or overview that summarizes the book in a catch phrase or short sentence (manually entered by Author, Editor or Admin, not visible if field left blank
* Book description (displays the first 12-15 lines if description runs long, followed by MORE link)
* Praise & huzzahs – Text field to be entered by Author, Editor or Admin with praise for the book from authors, reviewers, publications or readers
* Behind the Book – optional text field for author to fill in, describing what went into the book’s research, writing or publication, or how the series came together
* COMMENT OR REVIEW button – calls up Reader Buzz modal (see below)
* Sign up for specials – text link for people to subscribe to email offers in this genre
* Genre(s) of book – manually selected from genre keyword list by Admin, Editor or Author
* Keywords – other structured keyword phrases, entered by Admin, Editor or Author, that appear as pill-shaped ‘buttons’ or ‘chiclets’ (not as keywords for search engines but as new ways to display books in long-tail category groupings on the site; eg: “Women sleuths,” “Australia,” “Canada,” “Christmas theme books” or “Stories for dog lovers” or “Billionaires romance” and “Cowboy romance”)
* Content warning – optional text field if book contains strong violence, sex, etc.

*Tab 2: Appearing on the* ***Reader Buzz*** *tab:*

* **Shout-out** – These testimonials or “call outs” appear at the top of a Book or Author page. They could be blurbs created by an Editor, Admin or Author, or it could be a review that an Editor, Admin or Author checks to *promote* it to the top placement on the page. It will display up to 3 lines of text, followed by a MORE link. We’ll ask the Author not to repeat a blurb that appears under Book Info > Praise & huzzahs.
* **Reader Buzz:** for the MVP, just display the most recent reviews and comments appearing in rows of three modules or boxes, about four lines max with a MORE link. See the *Reader Buzz* tool right below for details.
* **Top keywords:** this will display the keyword terms (represented by pill-shaped ‘buttons’ or ‘chiclets’) selected most often by our readers in the *Reader Buzz* tool. A reader who clicks a keyword here will be taken to a *keyword-based category page* listing every book with that keyword, ordered by most recent at top.

(See image below; page MOCKUP coming)



*Keyword-based categories*

*Tab 3: Appearing on the* ***Sample*** *tab:*

* Under a heading of Sample [*title of book*], this will be a modal that displays an excerpt of the author’s novel in a modal all in a long scrolling format for easy reading. We’ll enter this manually. (MOCKUP coming)

*Tab 4: Appearing on* ***Media / Trailer*** *tab:*

* Rows of any media provided by the Author, an Editor or Admin related to the book. Examples: Videos by the author talking about the book; book trailers (videos); podcast appearances (with embed); other media provided by designer, such as dust jacket or illustrations. (MOCKUP coming)

**Reader Buzz modal on tabs 1 and 2**

As soon as a User selects the COMMENT OR REVIEW button (these buttons will appear on the Book Info tab as well as the Reader Buzz tab), a Reader Buzz modal appears.

We will let any registered User publish comments about a book or review the book and assign ratings, as long as the User abides by the Quality Guidelines we’ll be creating. A User can flag a comment or review that violates the guidelines.

We may want to include a library of **emojis** for people to use to supplement their comments (though not in place of a comment).

We are also hoping we can build intelligence into the commenting system to screen for banned or restricted keywords and place those into a queue for moderation by an Editor of Admin, if there’s a ready-made library.

Each User creating a review or comment will do so by filling in fields on a modal that appears on screen as a popup with the background of the page blurred out. This modal (one of the content templates) will display the name of the book and the author across the top of the modal. The User can then enter info into 3 areas (MOCKUP coming):

* My rating – star rating of 1 to 5 stars in half-star increments
* Review or comment – Text field about 2 inches deep and expandable. Users type in a review or comment, or can copy and paste from their existing reviews elsewhere on the Web.
* What I took away – selection of predefined keywords about the book from a master list of keyword phrases in our database provided by Admins. Each book might have 5 to 20 keywords listed on a particular Book page. A User just clicks each pill-shaped ‘button’ to select it.

After the user hits POST, the post will go live, displaying:

• User image, User first and last name and nickname/user name (from 3 different fields)

• Star rating

• Text area with the review or comment (no headline)

• Display of linked keyword ‘buttons’ that a User can click \*\*\*

**Abuse**

Each Reader Buzz review or comment will appear immediately without the need for manual approval. Let’s discuss how to automatically prevent abuse or screen for certain words. Each Reader Buzz item will have a Flag icon which, if clicked by any User, will call it to the Admins’ attention via queue or notification (whichever is easier to implement).

**> Possible use of Cruiseable code base:**

We are making the code base of our existing website, cruiseable.com, available to your development team in case 1) you are developing this in Python and 2) you find the code useful. We spent 3 years developing the site and want to incorporate similar features and functionalities into this new site.

* We can use Cruiseable’s rich text coding for posts to display the SAMPLE text.
* Cruiseable already has functionality for a choice of star ratings (1 to 5 stars in half-star increments).
* Cruiseable also has functionality to create keyword (tag) phrases.

**2. Author pages**

Author pages will have a similar look, feel and modular makeup as the Book pages. (MOCKUP coming.) The Author page will consist of 6 separate tabs:

* Bio & Books [main page]
* Pics & Vids (#)
* Reader Buzz (#)
* Endorsements (#) – refers to Reader Buzz recommendations this Author has made for other books on the site
* Following (with # of Users the Author is following)
* Followers (with # of Users following Author)

# = displays number of entries in each tab

*Appearing across the top of all 6 tabs:*

* Author photo – can be manually replaced and updated at any time by an Author, Editor or Admin
* Author name – this is set by the Admins,
* FOLLOW AUTHOR badge – displays next to author name in one of two colors: the default badge, plus a different-colored badge is the User is logged in and already following the Author
* One-line title – eg: “International Man of Mystery" or "USA Today Bestselling Romance Author" (entered by Author or Editor)
* Author @username (with tooltip explaining how user can tag the author)
* Location – optional text field for Authors to say where they live (most of the time)
* Heart and bookmark icons – for Users to heart or save a Book page, detailed in Sections 5D and 5F
* Social sharing icons – detailed in Section 5E
* Genre keywords: Keyword phrases for all relevant genres and subgenres Author writes in (represented by predefined pill-shaped ‘buttons’ or ‘chiclets’ and selected via dropdown list, with each genre linking to a genre page such as Cozy mystery or Medical thriller)

*Appearing on* ***Bio and Books*** *tab:*

* This will be the default tab when User arrives on Author page.
* About: Author can enter any amount of text she’d like, but only the first 3 long lines will appear inside this box/module, followed by MORE link. About info can be formal or (preferably) informal, with info identical or similar to the bios on the Amazon page. This field can be edited at any time by Author.
* Other keywords – other structured keyword phrases entered by Admin, Editor or Author (not as keywords for search engines but as new ways to display results in long-tail category groupings on the site; eg: “UK crime author”)
* Praise & huzzahs – Some key testimonials (manually entered by Author, Editor or Admin)
* A link or button that lets Users sign up for this author’s mailing list. Author can enter a url for his mailing list signup page here.
* Explore this author’s works – displays narrow area with SAMPLE [NAME OF BOOK] buttons to let you read beginning chapters of a book by the author. Ideally, when an Author or Editor (with author’s permission) places this on a Book page, there should be a checkbox to enable it to appear on Author’s page as well in this area/module.
* Grid of books, divided into different genres or subgenres – all books in one genre are grouped together – and organized so that books in a series are grouped together. We will limit this to 3 rows of books with an arrow to SHOW MORE. The default view will be by MOST RECENT, but with books in a series appearing in the series order: Book 1, Book 2, etc. New releases are highlighted by a NEW RELEASE tag beneath the title, lasting for 45 days after the release date. Below each book cover image in the grid, we'll include:
* Book title
* Author(s) – some books have more than one author
* BUY IT buttons – clicking the BUY IT button (with our affiliate link) calls up a modal displaying the 5 retail outlets (if the book is “wide”) or just AMAZON KINDLE if it’s Amazon-only. We won’t show star ratings or prices here
* Blog posts – If Author has created any Blog posts on our site, we’ll surface the capsule of each post here. See the Blog section for more.
* Behind the books – This is an optional free-form text field that let the Author describe the background of any of his books and series. Or it could be about anything you’d like. It can be very long (we don’t want to limit this), but only the first 4 or so lines will appear, followed by a MORE link that opens up the box to its full depth. (This area will not appear if field is blank or checkmark isn’t made next to the box.)

*Appearing on* ***Pics & Vids*** *tab:*

* Rich media featuring Author or created by Author
* Collage of photos via Instagram API or uploaded manually
* Embedded videos in which Author appears
* Podcasts in which Author appears

*Appearing on* ***Reader Buzz*** *tab:*

* Display the most recent Reader Buzz reviews and comments appearing in rows of three modules or boxes, about four lines max with a MORE link. These are taken from ALL of the author’s books on our site. A User can also create a review or comment about the author directly on the Author page. Same tool specs as the *Reader Buzz* tool.

*Appearing on* ***Endorsements*** *tab:*

* Modules with book covers and links to Author’s Endorsements landing page: posts about other authors’ books.

*Appearing on* ***Following*** *tab:*

* Grid of circular photos displaying users Author is following; the tab heading will display the # of users

*Appearing on* ***Followers*** *tab:*

* Grid of circular photos displaying users following Author; the tab heading will display the # of followers

VISIBLE ONLY TO AUTHOR: *Appearing on* ***Subscriptions*** *tab:*

* Same exact functionality as any User has on her Account page (see below). Because the User can do this directly from his Profile page when logged in, an Author should be able to do the same when she logs in and goes to her Author page, since there is no separate Profile page for an Author. The Author can manager her email subscriptions list from this area, which is *visible only for the logged-in Author*.

**Author Dashboard**

Just as a User is able to edit the contents of his Profile page from right on the page, an Author will be able to do the same. So think of each Author page as a premium version of the User page, with additional form fields.

**Author permissions**

The Author should be able to organize her books into groupings for a series. It doesn’t matter to us whether this is done via the Author Dashboard or via his Books pages – whatever makes the most sense.

The Author cannot create a new subgenre category on the site, but she can suggest it to an Editor or Admin, and then assign his books to that subgenre category.

An Author can assign a book to a keyword category from a dropdown, or create a new keyword category if none exists for what he wants. (Eg: Love stories)

There should be a NEW BLOG POST button on the Author Dashboard as a visual reminder that he can blog on the site. Clicking it takes Author to an empty “Write a blog post” template. (MOCKUP coming)

We also need to give Authors an easy way to list which of their books have a promo running at what price points on which days. This would be the data entered into the *Date special begins* and *Date special ends* fields on the Books pages.

**> Possible use of Cruiseable code base:**

We can use some of the same functionality for Authors filling in form information as detailed below in *Section 7. User accounts & Profile pages.*

**3. Home Page**

Currently our thinking is that the home page will be consist of two main elements:

(1) a top slider element with a sign-up form, both of which look similar to houzz.com.

(2) a series of Carousels running down the page, a twist on what Netflix does with their main page. (Its Recommend Carousel drives 75% of the site’s viewership.)

MOCKUP coming.

Top navigation: This may change slightly:

• Home

• Reader Rewards – links to the main Reader Rewards static page and not any personal account info for our MVP

• Browse genres (landing page listing all major genre and subgenre category pages)

• New & upcoming (category page)

• My Favorites (visible only to logged-in Users)

And to the right side of the masthead area, a “Sign in” link, replaced by the User’s photo if he’s logged in.

**Slider (top area)**

We like the idea of what houzz does: Rotating images with a consistent headline (wording to come) and attractive sign-up form that lets you take the first step down the registration process via an email address and password or by clicking the Facebook or Google button. We would size all the main images consistently and spotlight some eye-catching images in the Romance, Fantasy, Thriller, Sci-Fi and 1-2 other genres.

Only Admins will be able to edit anything on the Home page. Admins will see a link to Home page in their Dashboard.

**Carousels (middle area)**

We want the Home page to load faster than Netflix’s front page (which takes 5.5 seconds on a fast connection) so file sizes will be important to watch, but we want to make sure all aspects of the site are optimized for fast loads.

In the next section, *4. Category pages,* we discuss how we’re organizing the site into different “genre buckets” (romance, thrillers) as well as buckets that an Editor can create on the fly, like “Holiday reads” or “Tropical thrillers.” The Reader Rewards Carousel will be the first Carousel below the slider, followed by all of the main Genre categories as well as additional categories that an Admin creates. Each Carousel will come with a custom design from our designer, so the background of the Romance Carousel will be more feminine, the Thriller Carousel may have a background graphic with blood and gore, etc.

**Footer**

The top nav & masthead and the Footer & Subfooter carry through to every page of the website. We’ll provide a detailed MOCKUP of how the Footer should look, including these elements:

• Blog

• About

• Team

• Contact us

• Ethics & transparency

• Quality guidelines

• For authors

• Media Center

These are all Static pages except for the main Blog landing page.

**Subfooter**

At the very bottom of the page we’ll have a narrow horizontal strip with two centered links with links to their static pages:

Terms of Service Privacy Policy

**> Possible use of Cruiseable code base:**

We anticipate Admins changing the Home page content lineup (by adding or subtracting different combinations of Carousels) on a regular basis. We want to be able to change the order of which Carousels appear first on the Home page.

In the Cruiseable Home page Dashboard, an Admin can “program” the Home page in two ways:

1. By uploading and then rearranging the order of each slider image through drag and drop. Each slider image has a different headline and links to a different article.
2. By adding an already published article to the Dashboard interface and clicking a checkbox to have it appear in the proper section (eg, Recent articles, Popular articles, Destination articles). There should be a WP framework for this, for example.

Some variation of these methods could work for a Home page Dashboard that lets Admins add new Carousels and reorder them.

**4. Category pages**

Below in **Section 5G** we discuss **Categories** and how we’ll use a taxonomy that lets us organize all this content (perhaps 5,000 books at launch) in a structured way and how this will allow Editors to easily find relevant content by drilling down in the directory tree as well as link related books together for the “Other books by this author” Carousel at the bottom of any Book page and “Similar authors” at the bottom of any Authors page.

But we also want Admins to be able to create “categories” on the fly through the content Dashboard. The idea is simple: The Browse Genres landing page will have different “modules” (possibly a grid of rectangles as BookBub does on its [Genres landing page](https://www.bookbub.com/genres), MOCKUP coming) such as Browse Romance, Browse Fantasy, etc.

In addition to these standing Category pages, we want Editors and Admins to create fun, fanciful or niche categories on the fly – for example, “Christmas theme books” or “Stories for dog lovers” or “Billionaires romance” and “Cowboy romance.” These categories will **not** have an accompanying email subscription option. Each of these on-the-fly Category pages will have its own instantly generated landing page that has a short text intro (generated via a simple form) followed by a series of Book modules showing off the book cover, book title and author.

From the reader’s point of view, he will see Genre categories listed on Book pages and Author pages, and by clicking on a keyword ‘button’ like Romance, he’ll be taken to that Genre landing page.

**Ordering content order in the Carousel**

Ideally, we’d like you to create an “ordering” function as part of an Admin’s Dashboard page so that when Admins “program” the Home page or a Category page, they drag and drop book covers into a “tray” to have titles appear in a certain order via AJAX. When the Admin arranges the book covers in a particular order, the books display in that order in the Carousel on the Home page or a Category page.

**Uniform templates**

All Category pages – whether a traditional Genre landing page like Romance or an on-the-fly category like “Christmas books” – will have the same look and configuration for both their landing pages and for the Home page Carousels. So you only have to code one template for the Category landing pages and one template for the Home page Carousels. (If we go with WP, might be easiest to create a page template for each category and a premade framework template saved in a template library).

The only exception is that we want a different background design element to be an option for an Admin to choose from a dropdown or auto-filled field. So, just as each Home page Carousel will have a different horizontal themed graphic behind it (Romance, Thriller, etc.), we’ll want to use the same background (the same look but a different image file) to serve as the background for the on-the-fly Category landing pages.

For the MVP soft launch, we’ll focus on a predefined list of about 30 categories (book genres and subgenres) that Users can sign up for as email updates when they register. (MOCKUP of User registration (step 2) page, showing all these Categories, coming.)

When an Admin creates a new on-the-fly Category, he’ll need to assign it under a father folder in either the Genre category directory (eg: Billionaire romance would fall under Genre > Romance > Billionaire romance) or under the General category (for topics that cross genres, like Christmas books).

**> Possible uses of Cruiseable code base:**

In Section 5G below, we discuss the multiple-level folder taxonomy structure (categories, subcategories, sub-subcategories and sub-sub-subcategories) for ships and destinations that Cruiseable has already created. Unless you have a more modern approach, this Windows-like directory structure can be converted to authors, books and genres.

Cruiseable also already has an "Add new Category" link that an Admin can use to add a new category to our directory tree (though I haven’t used it in a long time). We’ll see if it can be repurposed to serve our needs here. Again, it’s in Python.

**5. Sitewide requirements & back end functions**

We’ll list all the major site functions here with an explanation. Elements:

**5A) REGISTRATION & LOG-IN**

**Goal of this feature**

To get as many Users to register for our site and sign up for our email lists while gathering useful data about them and putting up as few barriers as possible.

We’ll have separate “Sign up” and “Sign in” landing pages and links on the site. MOCKUPS to follow.

**Three-step registration process**

**Step one:** New User enters email address on front page form or authenticates through Facebook or Google OAuth. There will be both a small SIGN UP form on the front page (very similar to the Sign Up form on https://www.houzz.com) as well as a Join link in the top navigation of the site.

By clicking the SIGN UP button (or Facebook or Google), it will take you to:

**Step two:** A page with the heading “What kind of books do you like?” above a list of genres and subgenres and checkboxes. Each checked box will subscribe the User to that newsletter. A User could click a “Select all” link at the top of each section to subscribe to all newsletters within a genre and uncheck any.

It will be a series of visually pleasing boxes broken into different categories, eg:

Bestsellers

Romance Select all

subcategories

Mysteries Select all

subcategories

Thrillers & action Select all

subcategories

Fantasy Select all

subcategories

Science fiction Select all

subcategories

General fiction Select all

subcategories

Young adult Select all

subcategories

We’ll provide a MOCKUP and the full list.

**Step three:** This takes the User to the next page with the heading, “Complete your registration” (MOCKUP coming).

• first field: [ ] [ ]

First name Last name

• second field: [ ]

User name on site

*Question 1: If User authenticates through Google or Facebook, the First, Last and User name fields can be autopopulated, correct?*

*Question 2: If User registers with email address, can we have the user name autopopulated in real time as the User types in the first and last name above it? So if he types in John Smith, the user name would be: John Smith – with a space instead of underscore like John\_Smith. WordPress, for instance, supports this.*

• third field: [ ]

Email address (sign in with this)

This is autopopulated from the email field on the home page and elsewhere, which brought the User to the registration process. They need to know this is what they’ll use to sign into the site.

• Button: COMPLETE REGISTRATION

**Redirect after registering**

After the User hits the Registration button, he’s taken to his new Profile page to complete it. (MOCKUP coming)

Ideally, *the first time the User is sent to this page*, he is taken through a one-time setup and shown a popup prompt with 3 steps and messages:

• Please upload a photo of yourself

• ‘Where you live’ one-line text field

• Please tell us your occupation and what you like to read (with arrow to About me field … presumably we’ll need a SAVE button that stands out)

Earn points to enter drawings and win prizes

As soon as the User uploads the photo, it’s saved without the need for a Save button.

• Button: FOLLOW AUTHORS

Clicking the Follow Authors button takes User out of the one-time setup to a Follow Authors page with a listing of the top authors in each Category (Genre) that the User signed up for in his email preferences, along with checkboxes to follow specific authors.

• Every User who completes the registration process is auto-followed by the site’s two founders.

• When a User registers, an automated email is sent to the address he entered, asking him to click a link to confirm. If the User doesn’t confirm within 24 hours, a follow-up email is sent. And a third one after 48 hours.

• We hope we can confederate our onboarding process so that anyone who signs up for our email alerts is also automatically registered on the site with the same log-in credentials.

• A visitor must become a registered User before he can comment on a page, heart a book or author, save items to his My Favorites page, and so on.

• Admins must have the ability to directly add a new user and manage existing users.

• Users who register can return to the site and sign in to leave a Readers Buzz comment or review and star rating on a Book page or Author page, to heart an article/author page/book page/photo, to follow other Users or Authors, to save items to his My Favorites page, and to buy books.

• An unauthenticated user (non-registered user) can read articles and buy books but cannot bookmark (save) an item, like an item, write a post, leave a comment, etc. If they try, they’ll see a popup message asking them to register. However, they can share an article, book page, etc. through the sharing icons on the page.

• A user who registers can later change his email or password through his Account page, or receive a password reminder.

• We will require a very high level of security for protecting passwords in our database, likely using SSL with static IP address on a dedicated server.

• We’ll store cookies in users’ browsers and want to keep the session alive for as many days as possible.

• We need your guidance on how to prevent spam and bot registrations. We notice that BookBub.com has no CAPTCHA checkbox for its registration process, perhaps because it’s a multi-page registration process?

**> Possible use of Cruiseable code base:**

• Cruiseable currently has a registration system in place with:

a) Facebook authentication;

b) Google authentication;

c) Ability for returning Users to sign into the site via Facebook, Google, or by entering the email address and password into two fields;

d) Ability for Admins to add a new User and mark them as “Active.”

Missing: 3-page process to capture users’ email newsletter subscriptions; use of first and last names; autopopulated fields.

**5B) PERMISSIONS AND ROLES**

We will use a Permissions structure and roles similar to Cruiseable, which has 4 roles. Our site will have 4 active roles:

1) **Admins.** Admins can manage and make changes to any page on the site, add a new user or change the role of a user. Any Admin can upload photos and articles to our server and edit or delete any content or comment. Admins are not given access to a User’s My Favorites contents. Admin’s Dashboard view consists of: Manage users, Manage content, Image Gallery. The Manage content page should surface any content awaiting Admin approval to the top of the queue. (Dashboard MOCKUP coming.)

2) **Editor**. An Editor can create and edit articles and manage/edit content on landing pages such as Author pages, Book pages and Category pages. He can also edit all image information in our database. An Editor \*cannot\* manage users or edit static pages (only an Admin can). Dashboard view consists of: Manage content, Image Gallery (MOCKUP coming). Manage content consists of a list of published content with links and filters at top (MOCKUP coming). Image Gallery consists of directory of all images uploaded to our database (MOCKUP coming). The Editor’s role and permissions will be the same permissions as Cruiseable currently has (except the developer will need to configure the new content categories).

3) **Author**. An Author can manage his or her content only. He can blog on his own Author page and submit the post to our main blog. He can upload photos to his Author page and Book pages. He can change the contents of his Author page and on any of his Book pages. But he cannot edit, manage or change anything on a Category page or the Home page. In addition, he has all the same permissions of a User. His Profile page uses an Author page template once a checkbox is checked indicating that this User is also an Author. An Author has no Dashboard, but he has a much more extensive set of options on his Author page.

4) **User**. A User can post a My Take on any Book page or Author page (via modal) and post a comment on a blog post. After posting, a user can edit or delete his own comment. A User has no Dashboard but can access his Profile page with a button to call up his account settings with his list of email subscriptions, which he can update at any time from this page (MOCKUP coming). A User can also update his About me field on his Profile page and see his private My Favorites.

5) **Moderator**. Optional inactive role, we won’t use until Phase 2, if ever.

As soon as a User completes the set-up process described in Section 1A, he (and the public) will see his image displayed on his Profile page, Reader Buzz posts and perhaps comments.

All 4 roles can *save* items to their personal My Favorites page and *heart* an article, author page, photo, blog post, book review, book page or comment.

**> Possible use of Cruiseable code base:**

**•** Cruiseable currently has a permissions architecture with 4 of these 5 roles already built:

**- Admin.** No change in permissions but need to adjust settings to new database.

**- Editor.** No change in permissions other than to give him the ability to edit Authors’ content.

- **Author**. New role, you need to add this.

- **User**. No known change in permissions but need to adjust settings to new database.

**- Moderator.** No change in permissions.

That said, on WP it’s easy to grant granular permissions to different user roles.

**5C) USER NAVIGATION SHORTCUTS**

This works for authenticated Users only. When logged in, the User’s profile photo will appear in the top right masthead (page topper/navigation area), just as on Cruiseable, to let him know he’s logged in. If not logged in, it says: Sign in with a link to the Sign in page. We don’t require the User to use a mugshot of himself but want to make it easy to do so (see Account page below for details); if User doesn’t upload a photo, a default avatar will appear instead.

When a User mouses over his own Profile photo in the top masthead, it displays a popup tooltip with 4 lines of text, each of which is linked (MOCKUP coming):

• My Favorites (linked to User’s private page of bookmarked items)

• My Subscriptions (with an anchor link to User’s private account page with its list of newsletter subscriptions)

• My Profile (linked to User’s public Profile page, which User can directly edit on this page with Edit links)

• Log out

**> Possible use of Cruiseable code base:**

This is the same functionality as currently seen on Cruiseable. The popup will be greatly reduced from Compare Cruises, My Planner, My profile, Add an article, Create a visual list, Upload photo, My media library, Log out, to the 5-item list just above.

**Note:** The only changes will be:

• Substitute the different links mentioned just above (My Rewards, etc.) and the new CSS

• The User’s photo should be enlarged to match the same size of the user photo in any Gmail account (Google places it in the same position at the top right)

• Please fix the tooltip so it’s easier to navigate (on Cruiseable, it disappears if you’re not careful with navigating your mouse)

**5D) HEART AN ITEM**

We would like to add social interactions throughout the site. We are trying to add several emotion-driven social hooks into the site, and “hearting” is one. The code is already written but needs to be updated for the new database directory and set of media types.

Any logged-in User should be able to “heart” the following:

• A Reader Rewards posting

• A Book page

• An Author page

• A Category page (Genre and Subgenre pages)

• An image that is part of our database

• A blog post

When any user hearts an item, he immediately sees a circled popup that says:

Woot!

1

Hearted!

The number 1 increases to 2 upon the second user hearting the item, etc. That is, the “count” of the page or media item increases by one whenever a different user hearts the item. A user cannot heart an item more than once. If he does, a popup appears that says:

Already

hearted!

The system remembers the User’s past actions regardless of which browser or platform he’s using.

Nonauthenticated users should see the hearts on the site, too. When a user is not logged in and hearts an item, he sees the following popup:

Welcome to [name of site]! Please register or sign in to heart this item

**> Possible use of Cruiseable code base:**

While some of these functions (such as hearting) are open source, the Cruiseable developers spent 1-2 days customizing the code to the specs above. The only modification needed would be the media type, ie, instead of ship pages or cruise line pages, we’ll have Author pages, Book pages, etc.

**5E) SHARE AN ITEM (social sharing and other functions)**

Another important component of the new site is to make content easily shareable. So again we’d like to copy 100% of Cruiseable’s sharing functionality. The following 7 icons reside beneath each article and review on the site:

• Bookmark icon: Saves the item to user’s My Favorites page.

• Heart icon: Hearts the item.

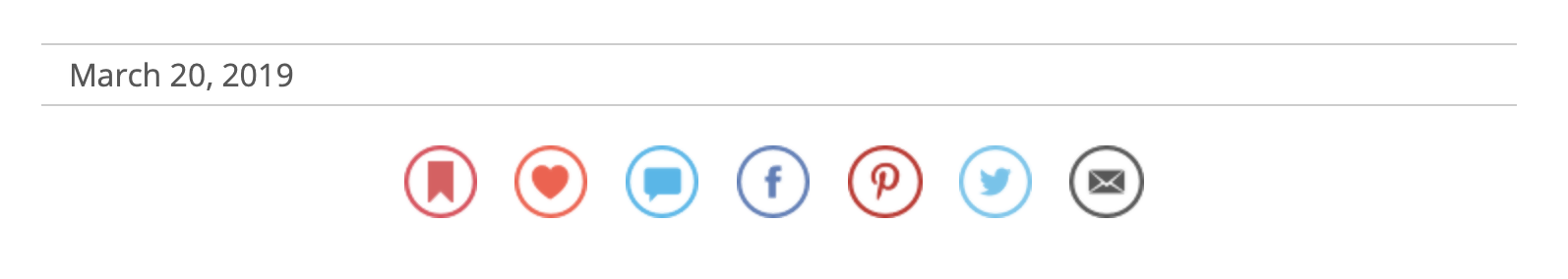
• Comment icon: Drops the User down to the Reader Buzz section of the page where they can see other recommendations or post their own.

• Facebook icon: Calls up a popup window with a pre-populated Facebook post based on the contents of the page – including the main image on the page (or a log-in prompt if User is not logged into Facebook in that browser).

• Pinterest icon: Calls up a popup window with a pre-populated post based on the contents of the page, including the image (or a log-in prompt).

• Twitter icon: Calls up a popup window with a pre-populated tweet based on the contents of the page (or a log-in prompt).

• Email icon: Calls up a popup window with a pre-populated email message based on the url of the page. (Let us know if we can add anything beyond the url in the body of the form.)



**> Possible use of Cruiseable code base:**

• All of this is already 100% built in the Cruiseable code base and just needs to be assigned to new content types.

**5F) BOOKMARK (SAVE TO MY FAVORITES PAGE)**

We want to give every registered user the ability to bookmark an item to save it to his My Favorites page. See the first “bookmark” icon immediately above. Items will include:

• Book page

• Author page

• Category page

• Any static page, including Reader Rewards

• Search results page

• Certain images

See the My Favorites spec (item #8) below for details on how this page will look. The data provided by each user should be available for us to use in Phase 2 as we add personalization features.

**> Possible use of Cruiseable code base:**

• All of this is already built in the Cruiseable code base. We do need to change the existing page types (ship page, cruise line page, etc.) for the new page types (Book page, Author page, Category page, see list just above).

**5G) YOU MIGHT ALSO LIKE** (our term for “Related items” found below articles on many content sites) & Category structure

**Pages and Posts**

In general, WordPress’s distinction between pages and posts is a useful distinction. The Home page, Book pages, Author pages, Category pages, Static pages, and Search results pages are considered **pages** (some of which are dynamically generated). Blog posts are considered **posts**. However, “posts” and “updates” appear as part of Author and Book pages as well.

**Folders and Categories**

When any page or post is created, it must be assigned to a specific category in the site’s taxonomy or directory. If no choice is made, the system assigns it (upon saving the page) to the top-level of General. Here is an example of how such a directory might look (MOCKUPS to come):



This Windows-like directory tree of Categories does the job of showing all the various content “buckets” on the site. However, *if you know of a more modern framework to replace this taxonomy structure, we’d love to hear it.*

Every content type – Authors, Books, Categories (Genres), Series, etc. – will be listed here, along with every individual author’s name, every book’s name, every series name, etc. for all of our participating authors. The Image Library will have a similar but completely separate directory tree.

This directory is visible only to Admins and Editors. Authors don’t need to see it because when they have a new release, an Admin or Editor will create a new folder for their new Book page and send them the link in the Content Dashboard for them to finesse the contents of the page.

**Related Categories**

Related Categories is a 100% clone of the Categories folders. When a new folder is added to Categories, it’s also automatically added to Related Categories without a separate action being taken.

The purpose of Related Categories is for Admins and Editors to program the site’s content to show off related books and content. Only an Admin or Editor sees Categories and Related Categories when they call up a Book page or Author page in their Dashboard view.

When a checkbox is made to a specific folder in Related Categories on a specific Book page, and the Publish button is clicked, the bottom of the Book page will immediately display modules of Related items or articles. For now, this will be programmed manually by our Admins and Editors based on checkboxes attached to the directory of books, authors and categories. For example, the bottom of one author’s billionaire romance novel may show other authors’ billionaire romances.

The directory is based on the taxonomy that we need to establish in the Dashboard, as follows:

• **Authors**

• Author name [multiple folders here, such as Nick Thacker in Example 1]

• Books

• Book name 1

• Book name 2

• Series

• Series name 1

• Series name 2

• **Genres**

• Romance

• Billionaire romance

• Contemporary romance

• Cowboy romance

• Historical romance

• Paranormal romance

• Thrillers

• Conspiracy thrillers

• Dystopian thrillers

• Legal thrillers

• Medical thrillers

• Military thrillers

• Spy thrillers

• **Reader Rewards**

• Active

• Archived

• **Blog**

**> Possible use of Cruiseable code base:**

If we go the WordPress approach, can WooCommerce be used for these related content items?

If we go the Python route, much of this is already built in the Cruiseable code base. We would need to change the existing categories from these:

• Cruise lines

• Cruise news

• Cruises

• Destinations

• General

• Topic pages

[all of these have subcategories]

… and change those categories to the taxonomy structure listed in part above. The existing Cruiseable taxonomy is 4 levels deep (eg: Cruise lines > Crystal Cruises > Crystal Serenity > Destinations) so this should pose no problem.

**6. Content Management System**

If you decide to go the Python route, we would be able to use the same built-from-scratch CMS as Cruiseable uses, with some modifications that we will describe here and in more detail on Trello. The CMS system, which an earlier Python development team built, is sophisticated and robust. Details:

• Admins and Editors (but not Authors, Moderators or Users) will have access to a CMS Dashboard consisting of these sections with a different interface than the directory tree structure described in Section 1G (which appears in the Edit view of Books and Authors). The main sections of the CMS are:

• Admin (visible to Admins only)

• Home page

• Category pages (visible to Admins only)

• Manage Users

• Manage Content

• Image Library

This Dashboard view allows Admins and Editors to easily navigate to any content on the site, either through search or via filters (see section 2A). The Content Dashboard is an aggregation of all pages and posts. The Image Library provides a different search and filtering interface.

We will now describe the main two sections of the CMS: Manage Content and Image Library:

**6A) MANAGE CONTENT**

• The Dashboard view for Admins looks like this:

Admins

Home page

Category pages

Reader Rewards

Manage Users

Static pages

Manage Content

Authors

Books

Blog

Image Library

• The Dashboard view for Editors looks like this:

Authors

Books

Blog

Reader Rewards

Image Library

**Content types & content templates**

Whenever a new page is created, it must be assigned a content type (perhaps from a dropdown) in addition to a Category. Sometimes this is done automatically – eg, when a User clicks a “Leave a review or comment” link, it calls up a *Review or comment* form (one type of content template).

In a WordPress dashboard, there are two top-level kinds of content types; an admin can Add a New Page or Add a New Post for two kinds of content templates (as well as sub-level types like “video post,” “promo page,” etc.).

On our site, the makeup of each content template in the Manage Content module will vary depending on its content type:

- Author page

- Book page

- Category page [Admins only]

- Reader Rewards

- Blog post

- Static page [Admins only

The individual pieces of content created with these templates, together with the Home page, images, API feeds and internal page elements such as Reader Buzz, should make up all the content on the site. You’ll notice that Admins can create a new Category page with this Category page template, which then will appear as a line item in the Category pages section of the Manage Content dashboard. You’ll also notice “Home page” is not one of the content templates that can be created because there’s only one home page and it’s already in the Manage Content dashboard.

**Sample workflow**

For a sample workflow: An Admin logs into the Dashboard, goes to Manage Content, and chooses ADD POST. The system automatically calls up a dropdown where the Admin chooses the *Book page template*, assigns it a content type of “book page,” and files it into the proper Category. Once it’s Saved, the folder (named after the book title) would now appear in the database’s directory tree in this location:

Authors > Author name\* > Books > Book title\*\*

\* Author name will be the first field entered into the Books page template. An auto-complete will show whether the Author already has other books listed in the database.

\*\* The book title will be taken from the second field on the page, *Book title*.

The entry of the author and book title also creates the slug (url) for the page. In Cruiseable's CMS, the slug will change each time the title changes, but you can click a checkbox to retain the current url. Let’s keep this.

The Admin then fills in the remaining fields detailed in the Books page section below.

During the editing process, an Admin or Editor might hit the SAVE DRAFT button several times. We don’t need versioning; only the most recent Draft will be saved. When ready, the Admin will hit the PUBLISH button. Click the link near the top and voila! The new Book page appears instantly on the site.

**Manage Content Dashboard**

Admins and Editors can browse through all content in the “Manage Content” Dashboard view via multiple filters at the top of the page that let them filter by:

- Title (of page or post)

- Date created

- Date modified

- Author (of page or post)

- Status (draft, pending, published)

- Kind (post type: Author page, Book page, Blog, Static page, see next section)

**> Possible use of Cruiseable code base:**

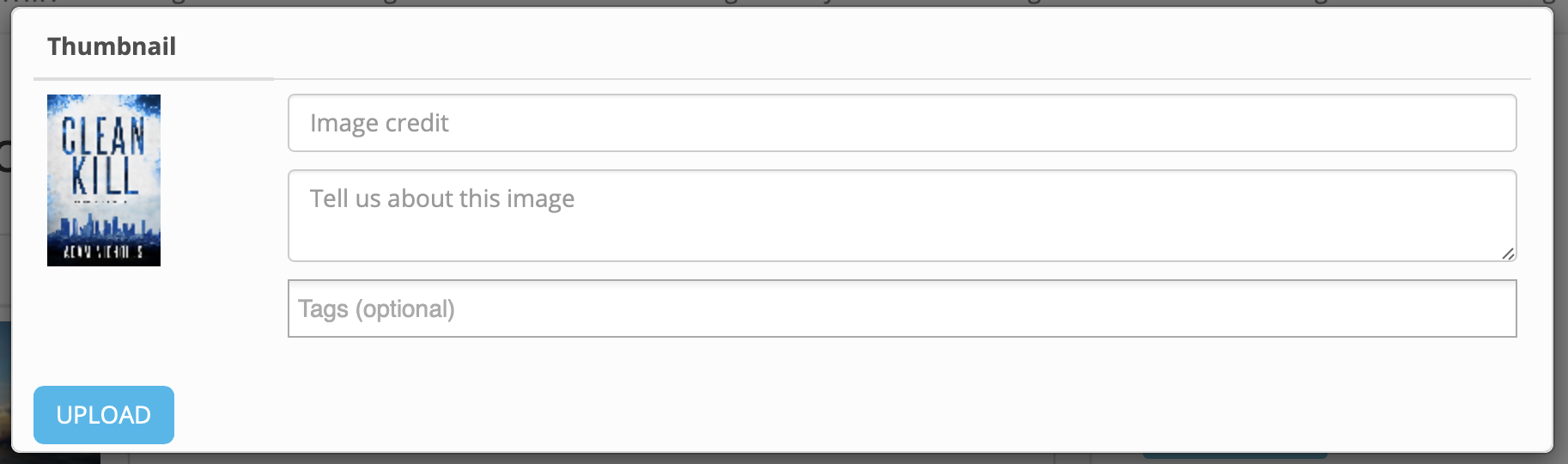
The basics of this Content Management System has already been built in Cruiseable, including a WYSYWG Visual and HTML toggle that lets you view the content in Rich Text or html (similar to WordPress but better because it’s simpler). The HTML field supports most html but not javascript.

If we go with Python, this can be customized to our needs, with a few additional fields and capabilities detailed in the Book pages and Author pages sections below.

Here are some additional elements of the Cruiseable CMS we could maintain if possible:

• **Main photo upload:** For a main photo on a page that isn’t uploaded programmatically, let’s retain the existing functionality that lets an Author add a photo to the top of a blog post. We may use this functionality for some of our page templates, too. The image can be uploaded via drag and drop or by navigating to the file on one’s computer; it’s stored on our Google Cloud account. (We don’t support video uploads.)

See example:



*Main photo upload modal*

• **Photos tagging:** When a content template is used to create a new page, an Editor or Author can add images throughout the page in specified ways. There is an upload image icon on most templates. When this is chosen, the Editor again can drag and drop an image or navigate to the file on his computer and upload it to our Google Cloud account. As part of the upload process, the CMS automatically adds the ‘alt’ tag to each image by using the full caption and it inserts a ‘title’ tag from the ‘Anchor tag title’ field.

**• Insert link**: The insert link command automatically displays:

- URL: a field that’s populated in one of two ways: (a) by clicking an item found through the “Search site” results, or (b) by entering/pasting it manually.

- Text to display: This simply shows the text you’re linking.

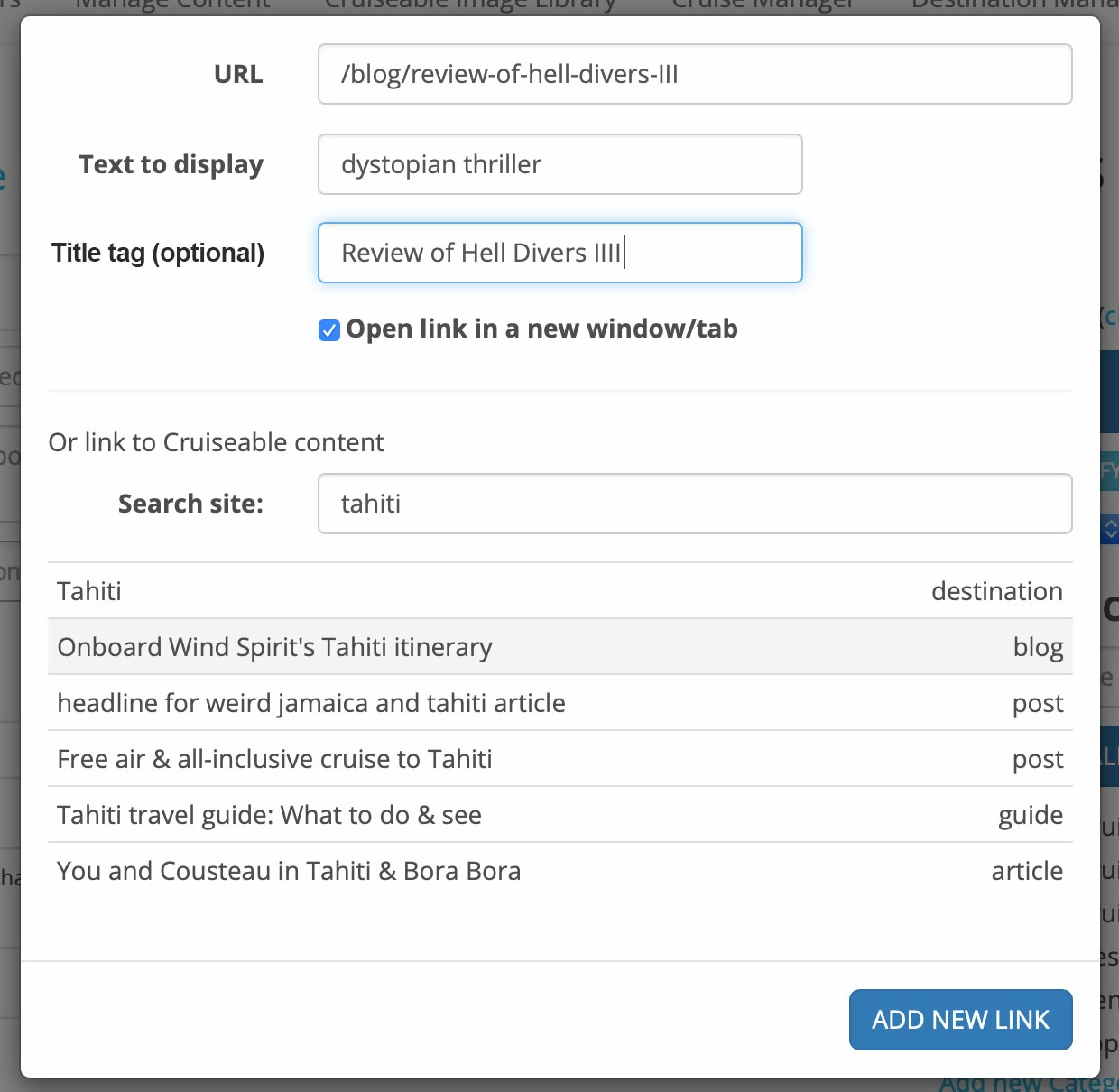
- Title tag: An optional title field for your link.

- Search site:Any Author (or Admin or Editor) can search the Image Library to add an image to his blog post or a book review. Just enter a keyword and the results immediately appear at the bottom of the modal.

- Checkbox: We’ll keep this checked by default, allowing the page to open in a new tab or window. A User can uncheck it.

All of this is already built in Cruiseable.

Example:



*The link insertion modal in the blog post template.*

• **Capsule field:** Provides a summary of the post as the Meta description for Google and other search engines. Fully functional on Cruiseable but we need to add a character count.

• **Blog post author:** Whoever creates a new Blog post automatically see his name appear at the bottom of the post in a radio button. The author can be manually changed. The system then takes the Author’s Profile photo and uses it as a visual byline on the post. It also grabs his “About me” as the tagline. (This all exists in the Cruiseable database.)

In addition, at the right side of most content templates (MOCKUP coming), we’ll see a Status area with the following:

- SAVE button

- PREVIEW button

- PUBLISH button

- The status (draft, pending, published)

- Publication date

- Publication time

- Text inks that enable an Admin or Editor to update any of these.

- small Delete post link

In addition, the following items (at the bottom right on the same templates) are visible to Admins and Editors only:

**- Related Categories** (below the Status area) to assign the post to multiple categories via checkboxes. (Use case: Author writes a blog post that appears under her name on her Author page and Editor wants to add it to our main blog.)

- **Categories.** Both Categories and Related Categories were discussed above in **Section 5G.**

All of this functionality is already built in Cruiseable and just needs to be customized for the new content types.

Note that based on their Permissions, Admins/Editors and Authors will create content in different ways:

- Author will see a CREATE button on his Author page and Books pages. Clicking the button will take him directly to a content creation form (MOCKUPS coming).

- Admins and Editors can go to the CMS Dashboard, navigate to the Manage Content area and click an ADD POST button. We also want to make sure Admins and Editors can create new Categories on the fly – such as “Holiday reads” or “Tropical thrillers” or “Murder in the countryside” – to add to the Home page or Browse Genres landing page.

**Series**

Admins, Editors and Authors should be able to combine different books that authors write into a discrete Series simply by entering the name of the Series in the Series title field and then highlighting the books that belong in that series in the correct order through AJAX drag and drop.

**Blog posts**

We’ll allow Authors to create Blog posts about whatever is on their mind: thinking about the plot of their next book, talking about their new release, commenting on trends in their genre, etc. Upon publishing, the blog post will instantly appear, just as with each Reader Buzz item.

**6B) IMAGE LIBRARY & IMAGE ASSET MANAGEMENT**

All images will be stored in Google Cloud and resized on the fly when pulled down from Google Cloud to the dimensions specified in our code or in the post; Google Cloud resizes to the longest dimension of the image, regardless of whether it’s a horizontal or vertical photo, as we understand this.

Editors, Admins and Authors will be uploading certain image assets such as book covers, profile photos, article and blog photos, etc. We want images on certain pages to look uniform, so on a Book page, the depth of each book cover sitting in a Carousel should be the same height, while the width can vary.

Every image that is uploaded should have a friendly file name (for indexing by Google) as well as alt and title tags. In addition, other fields should allow (but not require) fields for caption, photographer, copyright and keywords.

The Image Library should be divided into the same directory tree with the same taxonomy as defined in **Section 1G** above:

• **Authors**

• Author name [multiple folders here, such as Nick Thacker above]

• Books

• Book name 1

• Book name 2

• Series

• Series name 1

• Series name 2

• **Genres**

• Romance

• Billionaire romance

• Contemporary romance

• Cowboy romance

• Historical romance

• Paranormal romance

• Thrillers

• Conspiracy thrillers

• Dystopian thrillers

• Legal thrillers

• Medical thrillers

• Military thrillers

• Spy thrillers

• **Royalty-free images** – a pool of images from different sources we will gather and upload as a resource for Authors and Editors to insert into posts and pages – constitute another top-level folder in the Image Library. Each may have subfolders that an Admin or Editor can create (as in WordPress’s “Add New Category” link).

• Each page or blog post may pull image art from any accessible image folder/category – for eg, from the Royalty-free images folder and from the Nick Thacker folder with an image of him, and the book jacket from The Enigma Code folder.

• Images will be filed in hundreds of different folders. When two images with the same file name are uploaded, the second one receives a “1” at the end of the name. All images will be sized and optimized for mobile.

• Except in rare occasions, we won’t be hosting photos or videos on our own servers. However, all posts and pages should enable users to easily embed a video from YouTube or Vimeo.

**Search vs. browsing images**

The Image Library allows Admins, Editors, Authors and even Users to search images in multiple ways:

a) by Search, prioritizing file name, keywords, caption or photographer

b) by Browsing the Image Library’s directory tree of image folders.

**Inserting images into posts and pages**

Images can be added to posts and pages in two ways:

• Insert image into top area of post or page form

• Insert image into body area of post or page form

Images inserted into top area will be automatically reduced in size to fit the required image area on the post or page.

Images inserted into the body area will display via a List or Grid view and then area can be manipulated:

• The user can just insert the image to the default dimensions using the default Caption.

• The user can add his own caption to the Caption field.

• The user can determine positioning via the Align icon (right, left or none)

• The user can choose from 4 different sizes: 100px, 400px, 800px, 1600px

**> Possible use of Cruiseable code base:**

About 75% of the CMS – for the Content templates and Image Library – is already built in the Cruiseable code base. We need to change some configurations (such as the image upload interface) and category configurations as well as assigning new content types and updating the accompanying wording.

Already built:

• Dashboard with directory tree configuration for Image Library

• Dashboard with directory tree configuration for content groupings

• Full “Create a post” form templates and functionality that is superior to WordPress in many ways.

• Back end with integration with Google Cloud Storage for images.

Not currently built:

• A simpler photo search and upload interface

• The ability to combine multiple book titles into a Series grouping of images on the Author page.

**7. User accounts (private) & Profile pages (public)**

Under **Section 5B** above, we defined the 4 active types of user roles: Admin, Editor, Author, User (with Moderator having the same exact user profile as Editor for now). Each type of user will have a slightly different account page, while there will be only two different kinds of public Profile pages. Let’s discuss Account pages first.

**Account pages**

**Account pages for a User**. Any visitor who registers on the site will become a registered User. After registering, the User can access his Account page by clicking on or mousing over his User photo in the top right masthead to see “My account.”

There is no User Dashboard, as there is for Admins and Editors. Instead, a User’s Account page is actually the person’s public Profile page with Edit links. (MOCKUP coming.) A User can:

• Upload a profile photo or replace it (if users don’t upload an image of themselves, we’ll use a default avatar on their Profile page and in their posts)

• Change his nickname/user name (it’s for display purposes, not to sign in)

• Fill in or update the “City & state (or area where I live)” field\*

• Fill in or update his About me (the About me field is limited to 50 words and it shows the User a word count and prevents words beyond 50)

• Fill in or update “Some favorite books” field

• Fill in or update “Ask me about …” field

• Fill in up to three personal or professional urls next to their website names

• When he’s logged in, only the user can see his list of email subscriptions by clicking a heading in the bottom half of his Profile/account page.

\*Note: We prefer that Users register with the Facebook or Google button because we get their real name and can prepopulate the User’s Account page with:

• First name

• Last name

• Current city

• About me (I think this can grab a Facebook user’s “details about you” field, no?

Note: A User’s email is not displayed anywhere on the site and is accessible only to Admins.

**Account pages for an Admin.** An admin has the same account page look and feel as any User, plus the ability to see a strip across the top of every page (similar to WordPress) that enables him to jump to any content section as outlined in **Section 2A** above.

**Account pages for an Editor and Moderator**. This will be the same exact interface as an Admin (just above), except the Dashboard view restricts him to fewer links.

**Account pages for an Author**. Same as every User, plus in addition his Author page has more features and options he can fill in. This Author page takes the place of a User page. See details in the Author page section below.

**Profile pages**

Our site will have *User* Profile pages with multiple tabs, similar to what BookBub\* does but with a different look and color:

• *Tab 1 (default top level):* About

• *Tab 2:* Reader Buzz

• *Tab 3:* Stuff I Hearted

• *Tab 4:* Following

• *Tab 5:* Followers

• Tab 6: Email subscriptions (visible only to the logged-in User)

\* see BookBub’s tabs on any Profile page: <https://www.bookbub.com/profile/j-d-lasica>

(MOCKUPS coming.)

**Tab 1: About**

This is the top-level tab where the User can directly upload an image and edit the text fields detailed at the beginnign of **Section 3**.

**Tabs 2-5: Reader Buzz, Stuff I Hearted, Following, Followers**

All of this is added programmatically whenever a User:

• Leaves a Reader Buzz review or comment that’s at least 10 words long.

• Hearts an Author page or Book page (for MVP, this will be just an undifferentiated grid with images aligned with the same height)

• Following = a grid listing of Authors and Users this User is following, with all Authors appearing first. A User can unfollow someone on this page.

• Followers = a grid listing of Authors and Users who are followers of the User.

**Tab 6: Email subscriptions**

A User can update his Email subscriptions from this tab at any time. This needs to be integrated into whichever email service we use, possibly a homegrown one (authors.email, depending on costs), possibly via an API. This tab shows the same set of emails that a User can sign up for (categorized by genre and subgenre) as the User encountered during the sign-up process (Step 2 of the Registration process outlined in Section 1A above).

**> Possible use of Cruiseable code base:**

Cruiseable’s Manage Users functionality gives each User a list of optional fields to fill out on his Profile page. So the designer will style it to look different, but the basic functionality remains the same.

**8. My Favorites**

As discussed above, the My Favorites page is a private area when an authenticated User can stash items from throughout the site by clicking the Bookmark icon on any:

* Reader Rewards entry
* Book page
* Author page
* Category page
* Static page
* Certain photos (TBD after we discuss with you)
* Blog posts

Each content type is represented by a module that displays the basic elements of the saved item, including Title, image (whether solo or part of an article or page) and Author.

Any User can delete any content they saved to their My Favorites page. (Of course, deleting the item only removes it from the User’s My Favorites.)

**> Possible use of Cruiseable code base:**

Cruiseable has this code already built (if we’re using Python). Dev team needs to reconfigure media types to the new media types listed immediately above.

**9. Search results page**

Search results need to return relevant results. We’ll discuss, but we like the capabilities of ElasticSearch, the Java search engine that provides a distributed, multitenant-capable full-text search engine with an HTTP web interface and schema-free JSON documents.

Cruiseable uses ElasticSearch and all of the optimization for cruises and travel needs to be replaced by relevant content on our books site.

As part of the ElasticSearch configuration, we are hoping you can train it so that results from our team of 150 authors appears at the front of all SERP pages.

**Auto-complete**

And finally, we also enabled ElasticSearch to auto-complete search terms based on our cruise database. With an entirely new content database, we’re eager to see if we can get the same kind of good results. This behavior, obviously, is also evident in the Amazon search bar. ES can also be used in WP to speed up the database queries, search functionality, etc.

**10. Static pages**

We’ll need standard Static pages on the site such as:

• About

• Team

• Reader Rewards

• Contact us

• Ethics & transparency

• Quality guidelines

• For authors

• Media Center

• Terms of Use

• Privacy Policy

For all Static pages except one, we’ll need a single template to be built and we’ll handle the design and customization on our end. (MOCKUP coming.)

The **Team** page will have a different configuration and require a different template.

**> Possible use of Cruiseable code base:**

Cruiseable’s customized *“Write a post” page template* seems suited for this task with some additional customization.

**11. Blog**

Our Blog will be a standard blog that aggregates all blog posts into:

* a single main landing page
* separate pages for each blog post
* Category pages for blog topics
* Author landing pages for their blog posts

(nearly identical to WordPress’s behavior)

At the outset, only Authors (and Editors and Admins) will be allowed to blog. As mentioned above, we’ll include a WRITE BLOG POST button on the Author Dashboard. Each Author

At the outset, we see this as a single blog template (form) that offers the standard array of blog features: headline, author icon, publication date, WYSIWYG interface (rich text and html) with the Author or an Editor able to assign the post to multiple categories. (It is automatically assigned to the Author’s landing page based on his log-in and then by visually confirming the Author’s name at the bottom of the post. (This can be changed to a different Author if need be.)

**> Possible use of Cruiseable code base:**

Cruiseable’s *“Write a post” blog template* seems suited for this task with some customization.

**Final note for developers**

As discussed, we’ll give you immediate access to the Cruiseable code base so you can check out its utility. Contact JD Lasica to discuss. BUT we’re not locked into Python, and if you think a different approach (eg, php, WordPress with use of the xxx framework, etc.), we’re happy to hear your proposal.

After the MVP launch, in addition to cleaning up bugs, we’d like to begin additional development (eg, a notifications system with an in-box for users; a points system for users; creating a store for authors, perhaps using WooCommerce, etc.).

Thanks for considering this Scope of Work. We look forward to hearing your thoughts!

JD Lasica

James Rosone