PROFILING CHANGES FOR 5.0

INTRODUCTION

With 5.0, the plan is to make profiling something the server can "force" users to do. It will be able to direct the client to ask the user to do it, and also be able to force the client into Light mode if the user fails to do it.

This document is divided into four major parts. First, we discuss changes to the playlist specification. Second are changes to Adjoin. Third comes changes to the clients, and fourth we hand out jobs to our PR folk.

PLAYLIST CHANGES

Two existing tags (profile and clientmode) can now be used in the update response, as well as the request. They will force a new profileID on a client, or make the client switch modes. The playlist server is not to send these tags unless it wishes to change the profileID or client mode.

We have added a clientmode of 3, to mean "user is a deadbeat because he has refused to profile".

Finally, there is a new "nag" tag in the clientinfo part of the update response. The nag tag has a "level" attribute, which can be 0 (meaning the client should use a brief nag) or 1 (meaning the client should use the longer form with the feature list) or 2 (meaning the user gets the Intro nag). The content inside the nag tag is meant to be put in the dialogs in the application, and should be no more than 255 characters.

The playlistversion for these changes is "22"; henceforward, when we discuss the client, we mean clients using playlistversion 22 or above.

ADJOIN CHANGES

- ☑ Adjoin should assign a profileID to every adware-mode client that requests a playlist, using the profile tag in the clientinfo of the update response.
- ☑ Adjoin should count playlist fetches by these clients until the client is fully profiled.
- ☑ Adjoin must keep a nag schedule. The nag schedule should contain entries for the number of fetches since profileID assignment, the proper level for the nag, and the text to put into the content of the nag.
- ☑ Adjoin should deliver nags to the client based on the schedule, using the <nag> tag.
- ☑ Adjoin should devolve the client to Profile Deadbeat mode after a specified number of playlist fetches. The initial number is 14. It should use the clientmode tag with a value of 3 to force the client to devolve.
- ☑ Adjoin should reset the clientmode to 0 if it receives a playlist request from a clientmode-3 client whose profileID is complete.
- ☑ Adjoin must update its set of required fields in the survey.

CLIENT CHANGES

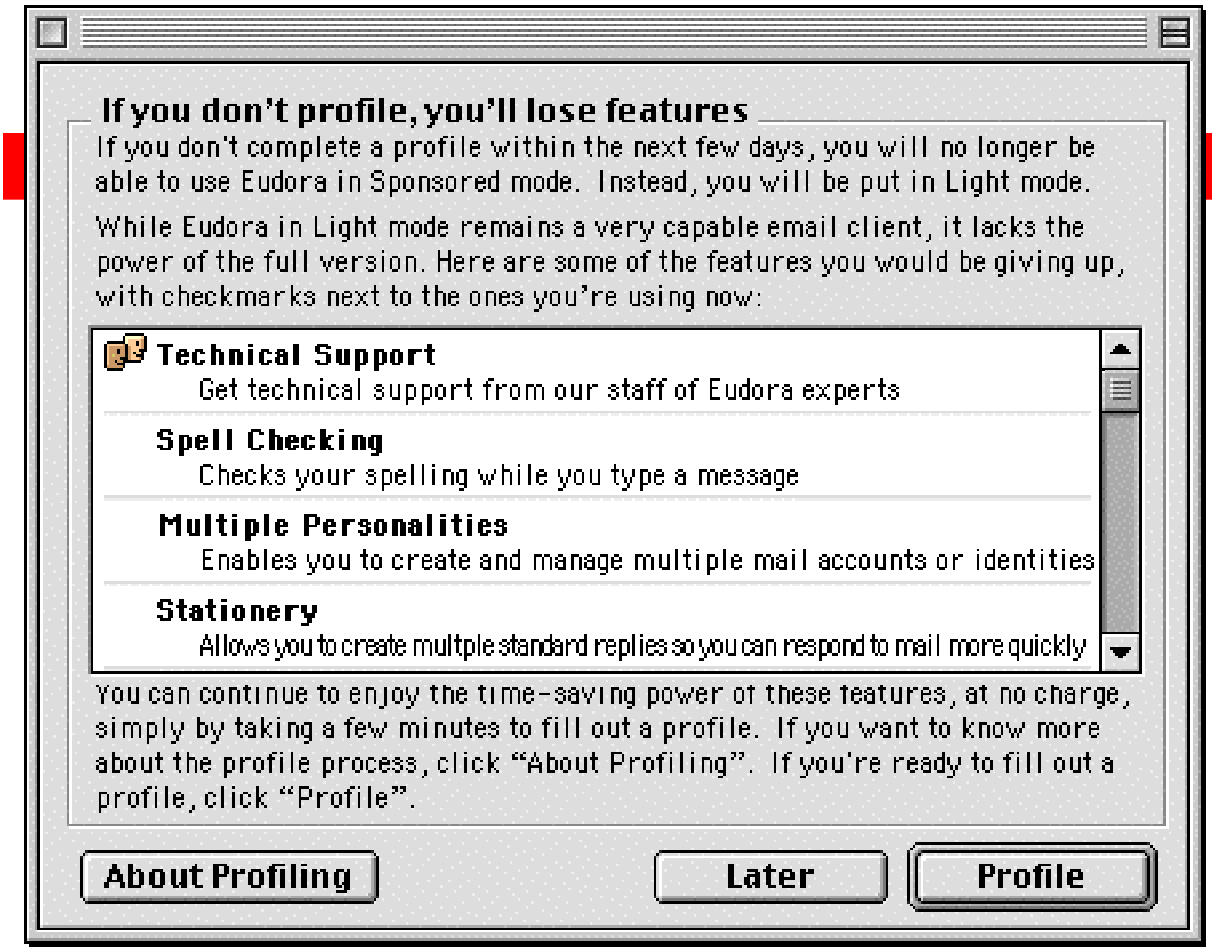
There is a significant amount of work to be done in the client.

☑ Eudora must accept the ProfileID from Adjoin. When the client seed the “profile” tag in clientinfo, it must store the profileID.

☑ Eudora must protect the ProfileID. Since Adjoin is now using the profileID for very important things, the client must protect it. A suggested implementation is to store the profileID in the In or Out TOC’s, so that it can be recovered from them in the event that it is lost from its current storage location.

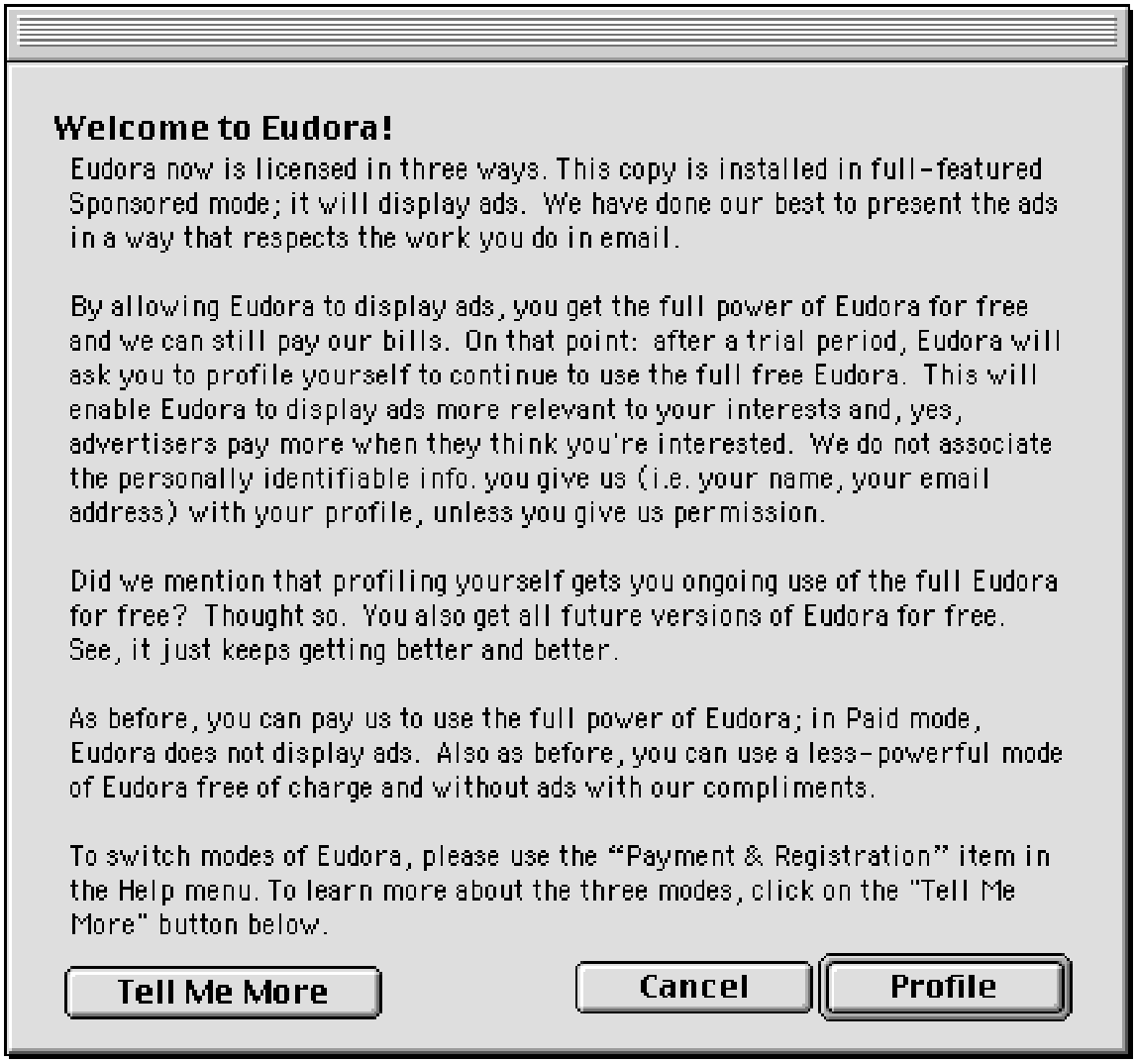
☑ Eudora must accept the nag tag and perform nags. Nags should be always-on-top, but not stop mailchecks or other processing. The level 0 nag is as follows:

The portion of the nag between the red bars is the text taken from the playlist. The level 1 nag looks like:



Again, the variable portion from Adjoin is between the red bars.

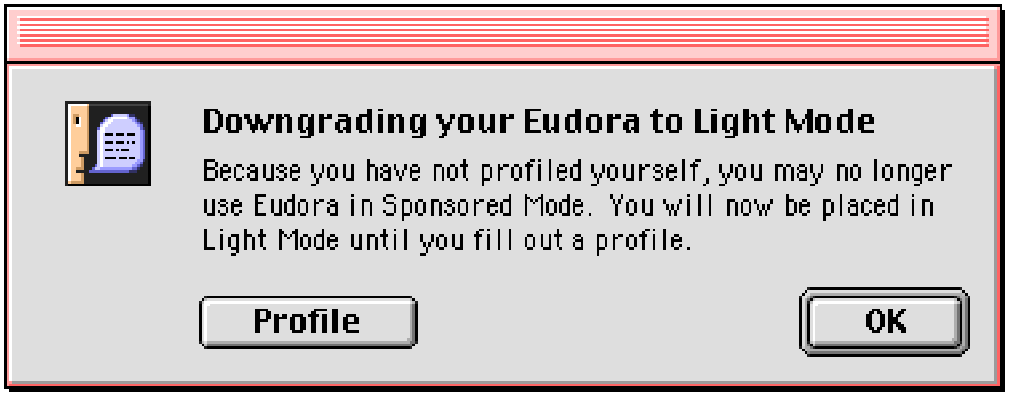
The level 2 nag, which has no variable text, is:



In each dialog, the buttons do as follows:

- The "About Profiling/Tell Me More" button goes to jump?action=profileidReqd
- The "Later/Cancel" button dismisses the nag.
- The "Profile" button takes the user to jump?action=profile.

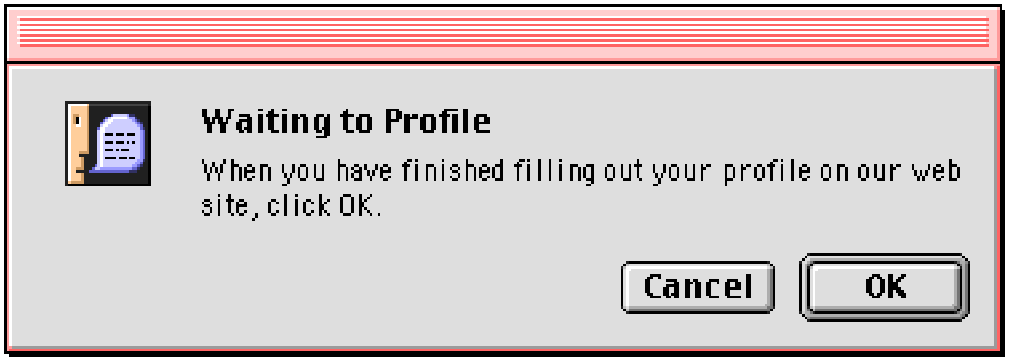
- Eudora must enter Profile Deadbeat mode on getting clientmode 3 from Adjoin. Eventually, if the user fails to profile, Adjoin will direct them to go into Profile Deadbeat mode. Profile Deadbeat mode is like Light mode, except that the client will give Adjoin a clientmode of 3, and there will be special processing if the user tries to switch back to Sponsored mode.
- Before entering Profile Deadbeat mode, the forced downgrade modal alert should appear.



Note that this dialog does **NOT** use the actual word "Deadbeat"! (No, we will *never* let you forget).

☑ Clicking on the Profile button in the downgrade alert puts up the "you will be taken to the web site to update your profile" dialog, and then sends them to jump?action=profile.

☑ While the user is profiling, an alert should be displayed in Eudora.



☑ If the user cancels the Waiting to Profile alert, they're switched to Profile Deadbeat mode.

☑ If the user says OK to the Waiting to Profile alert, Eudora should make an immediate playlist fetch. The server can then either leave them in Sponsored mode, or, if they didn't really profile, start the downgrade process all over again.

We also require some changes to the Payment & Registration window, which will be listed here.

☑ Profile Deadbeat users should be dumped straight into the profile process. They should get the explanatory alert and the Waiting to Profile dialog. If the Waiting to Profile dialog is dismissed successfully, then Eudora should make an immediate playlist fetch, and allow Adjoin to switch the user's mode.

- [ ] The “Register with Us” button should say “Update your Registration” if the user has a registration code. It should be enabled all the time.

- [ ] If the user clicks “Update your Registration,” they will get a small alert that says merely “Updating your Registration / You will now be taken to the Eudora web site to update your registration information. [Cancel] [[Continue]]”.

- [ ] The “Customize the Ads You See” button should be renamed “Profile”, and should say “Update your Profile” if the user has a profileID.

- [ ] The “Change your Registration” button should be renamed “Enter your Code”.

- [ ] The help button at the bottom of the window should be named “Take me to the Eudora web site for more information”, and should use a target of jump?action=payreg.

- [ ] The “Intro” button in the Intro Nag should go to jump?action=intro50. This will allow us to rehome the “Help” button in the 4.3 Payment & Registration window to go to the payreg destination as well.

Business-Side Changes

- [ ] There must be new text written for the “Intro” nag.
- [ ] The privacy policy must be amended.
- [ ] The license agreement must be amended.
- [ ] Determination must be made as to which survey fields are mandatory.

APPENDIX A - URL CHART

For convenenience, here is a copy of the URL chart.

	action															topic
Payment	pay	X	X	X	X	X	X	X	X	X	X	X				
Freeware Registration	register-free	X	X	X	X	X	X	X	X	X	X					
Adware Registration	register-ad	X	X	X	X	X	X	X	X	X	X					
Box Registrations	register-50box	X	X	X	X	X	X	X	X	X	X					
Lost Code	lostcode	X	X	X	X	X	X	X	X	X	X	X				
Update	update	X	X	X	X	X						X				
Pro Update	proupdate	X	X	X	X	X						X				
Archived	archived	X	X	X	X	X						X				
Profile	profile	X	X	X	X	X	X	X					X			
Profile FAQ	profileidFAQ	X	X	X	X	X										
Profile Required	profileidReqd	X	X	X	X	X	X	X					X			
Payment & Reg Help	payreg															
5.0 Introduction	intro50															
Introduction	intro															
Support	n/a	X	X	X	X	X	X	X	X	X	X	X				
QuickTime Missing	support	X	X	X	X											no-qt
Ad Failure	support	X	X	X	X											ad-fail
Tutorial	support	X	X	X	X											tutor
FAQ	support	X	X	X	X											faq
Light Users	support	X	X	X	X											light
Search Support	support	X	X	X	X											search
Newsgroups	support	X	X	X	X											usenet

APPENDIX B - NAG CHART

Fetch	Level	Text
1	2	Introduction.
2	0	Please complete the Eudora installation process by filing out your brief profile.
12	0	Please fill out your profile to continue enjoying all the benefits of Eudora in Sponsored mode. Eudora will eventually go into Light mode, which has fewer features, if you chose not to fill out your brief profile.
22	1	Please fill out your brief profile to continue enjoying all the benefits of Eudora in Sponsored mode. You have one day of usage left and then Eudora will go into Light mode.
23	1	Please fill out your profile to continue enjoying all the benefits of Eudora in Sponsored mode. If you do not fill out your brief profile now, Eudora will go into Light mode tomorrow.
24	<go to deadbeat>	