



CUSTOMER

Site Specification

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Introduction

This document describes the requirements and specifications for designing and developing the new CUSTOMER website. Some general implementation aspects of the specifications are listed in the doc “Common Spec Elements”. These elements are part of the spec and should be implemented as specified.

The forms and reports are described in the document “CUSTOMER Graphic Design Guidelines” (GDG).

The emails sent by the system are described in the doc “CUSTOMER System Emails” (SYSE)

The content of the site as well as the menu structure are listed in the doc “CUSTOMER Content list” (CONL)

The text, images and other media for the site will be provided as separate docs.

The site will use DRUPAL CMS.

CUSTOMER Requirements

1. The site will be informational and provide useful info about the CUSTOMER organization, its members and associate members, as well as to the general public.
2. The site’s main objectives are to encourage movers to become members of the organization as well as to encourage visitors to use one of the organization’s members or associate members as a service provider.
3. Registered active members will be able to login to members-only sections while non-members or other visitors will only have access to the public sections of the site.
4. Potential members and associate members will have an easy way to apply for membership via a registration form and would have to be approved by CUSTOMER. Access to the members-only section will be granted solely by CUSTOMER.
5. When designing the site allocate sections for paid advertising

Information Hierarchy (site structure)

The site will be made of pages, some of which will be categorized in sections which might serve different purposes.

- **Static Pages**
Static pages will contain text and images provided by CUSTOMER. CUSTOMER will be able to edit content on these pages from the control panel.
- **Dynamic Pages**
Dynamic pages extend the static pages by generating some of the information in real time as the page loads. CUSTOMER will be able to edit static content on such pages (if applicable) and the remaining content on these pages will be fetched from the database and displayed on the page as well.
- **Static Forms**
Static forms extend static pages’ functionality by collecting information from users. CUSTOMER will not be able to edit forms from the control panel since custom development is usually required when dealing with databases and the information from all forms must be stored in the database. In some cases, submission of forms may trigger an email that needs to be sent to the site manager/admin or the user who submitted the form and therefore the process of editing such pages could cause malfunctions or errors.
- **Section / Sub-section**
Sections or sub-sections extend static pages by allowing other static pages, dynamic pages, or static forms to be logically presented “in” them (hierarchically).

Technical notes:

1. All forms will be validated prior to submission and an error message indicating what the problem is will be displayed if needed.
2. Upon successful submission of all forms, users will be redirected to a unique thank you pages with a unique URLs.

Suggested Navigation Scheme (top level only)

- Home
- About
- Consumer Info
- Members Info
- Directory
- Contact

Suggested Page Hierarchy

- Home Page
- Sitemap (created and updated automatically)
- About CUSTOMER
 - Board
 - Membership Advantages
 - Membership Application
 - Contact
 - Legal
 - Privacy
- Information (chronological list of posts (as a blog) sorted into categories, like a blog, with RSS)
 - For Members
 - Education
 - Industry News
 - Legislative
 - Regulation
 - Movers News
 - Photo Gallery
 - Events
 - Member detail update
 - For Consumers
 - Find a mover
 - Moving & Storage Tips
 - Example: How to choose a mover
 - Videos
- Directory of members
- LOGIN [members only section – password protected]
 - Welcome (dashboard)
 - Register
 - Logout

Membership Types

The CUSTOMER website will support 4 different types of members:

- 1. Movers & Warehousemen Members – Annual dues \$450**
Individuals, partnerships, corporations or other legal entities of good business reputation, engaged in household or commercial goods moving and/or storage within New York State.
- 2. Associate Members – Annual dues \$450**
Firms or individuals in allied industries such as forwarding companies, material manufacturers, vendors, van line companies, tariff bureaus, moving and storage associations, out-of-state moving and storage companies, and other individuals/companies not directly involved in the moving and storage industry.
- 3. Sustaining Members – Annual dues \$275 – need clarification what this is, perhaps some examples**
Storage and trucking firms not associated with the moving and storage industry.
NOTE: sustaining members will have the same rights and benefits of active members.
- 4. Company Branch Members – Annual dues \$250**
Branch of Movers & Warehousemen or Associate members under the same ownership.
NOTE: Branch members will not have voting rights and their benefits are limited to receiving mailings and other membership materials, including discounts where applicable.

Service Categories

Each member will be associated with up to five service categories indicating their main services. The categories will be structured in a hierarchical list of up to 3 levels as suggested below. Every category will have a unique name that does not require the name of the upper hierarchy. The order of the items in the list will be controlled by the admin.

The scroll list will be structured in a hierarchical way, similar to the list below:

- Moving & Relocation
 - Local Movers (up to 100 miles)
 - Long Distance Movers (interstate, over 100 miles)
 - Interstate Movers
 - International Movers
 - Residential Moving
 - Commercial Moving
 - Special Moving
 - Heavy Moving
 - Industrial Moving
 - Automobile Transfer
 - Boat Transfers
 - Piano Movers
- Storage
 - Public Storage
 - Self-Storage
 - Private-Storage
 - Residential/Commercial Storage
 - Refrigerated Storage
 - Boat/Automobile Storage
- Other
 - Packing/Unpacking
 - Moving Equipment Vendors (Packing Boxes, Containers)
 - Van Line Companies

The initial list of categories will be provided by CUSTOMER. CUSTOMER will be able to update the list at any time from the control panel of the site.

Sections

Consumer Information

This is an informational section designed to educate consumers on how to choose a moving company and help them find the right service provider(s) for their needs. Consumers will also have the option to provide some basic information and get recommendations for service providers that meet the criteria provided.

Find a Mover Form (see GDG)

A form allowing consumers to enter basic criteria about their upcoming move and get a list of recommended service providers based on the criteria provided.

Input fields (all are mandatory):

- Full Name (free text, maximum 60 characters)
- Phone Number (digits, us format 3-3-4)
- Email Address (characters or @ sign only, maximum 60 characters)
- Desired Move Date (calendar popup)
- Move Size (drop down)
- Moving From (smart input field, alphanumeric input, auto-fill/suggest, must be validated)
 - Any US ZIP Code (either 5 digit, or 5+4 digit format)
 - County in the state of NY (one of 42 counties)
 - State if outside NY (one of 52 states, either full name of two-characters)
- Moving To (smart input field, alphanumeric input, suggested options, must be validated)
 - Any US ZIP Code (either 5 digit, or 5+4 digit format)
 - County in the state of NY (one of 42 counties)
 - State if outside NY (one of 52 states, either full name of two-characters)
 - Country if outside US (one of ~180 countries)

Form output (search results, recommended service providers):

- Upon successful submission of the “find a mover” form data will first be stored in the database for future reference and the system will process the request and display up to 5 results of recommended movers. The number of recommended movers can be changed (if needed) by VirtuosOnline.
- Recommended movers can only be **active** Movers & Warehouseman members. Non-active members will never be displayed as recommended service providers and therefore will not be able to get leads from the site unless they register and become active members.
- When choosing the recommended movers, based on the origin and destination provided by the user, the system will filter out providers that do not meet these initial requirements. Similarly, based on Move Size input (which will indicate Residential/Commercial) the system will further filter providers who do not meet the criteria.
- Finally, the system will try to make a “fair selection” so movers who were least recommended in the past will have a priority in the selection (if they meet the above criteria)- (each provider will have a lead-counter to support it).
- The results will be displayed on a new page (unique url) showing a list of recommended movers. The list will also show their contact info and a link to their profile page on the site, where additional information can be seen.
- In addition, the system will send email E7 to the user with the list of recommended movers and possibly some other useful info. The system will also send email E8 to each one of the resulting recommended movers providing them the user’s contact info and basic information they entered about the move (provided via form).

Membership Information

This section will serve movers & warehousemen and associate service providers, and other potential members. The main objective of this section is to get potential members to become active members of the organization.

Membership Application Form (Registration form in GDG):

The form will have the details listed under “member registration” below. Upon successful/validated submission the data

will be stored in the database and the applicant will be in “candidate” status. The user (applicant) will then be redirected to a unique thank you page letting him know what the next steps are and providing some useful information. The member will be able to upload one logo and up to 5 photos to the system.

In addition, the system will email the applicant a “welcome” email (E2) with useful info. Any changes to this (and all other) system emails require custom development, knowledge in Email Programming, and will be done by VirtuosOnline should there be a need (possibly for additional cost). The system will also send a copy of this email to the Site Manager/Admin notifying him of the new applicant.

If the Admin rejected the application (see the SM Forms in GDG), he will be able to fill the reasons for the rejection. This text will be saved in the DB and will also be included in the “rejection” email E4 that will be sent to the member. This email will encourage the member to try again in the future after he complies with the registration guidelines which will be published on the website and provided in the email as a link, or let him know he can call CUSTOMER for further information about why he was rejected.

If the Admin approved the application, the system will send an “approval” email E3 to the applicant, welcoming him and providing login details. This email can also contain links to the website with instructions how to use the site, useful resources and much more.

To prevent abuse of the system, all membership applications must be approved by the Site Manager/Admin. The information provided by the applicant will be stored in the database and the Admin will be able to see it and verify it or perform a background check based on that information. While the Admin is the only one who will be able to edit members’ information, the verification process will try to minimize the need of Admin typing any information into the system, so there will not be a need to copy and paste information (save time, effort and minimize the chances for errors).

Active members will have the option to update their profile if they are logged into the site via a form similar to the registration form (membership application form). Each member will only be able to access his own data and will never see other members’ data or be able to change it in any way.

Upon submission of an update, a process similar to the “registration” process will occur, where the system will send an email E5 to the Admin (and the member) and notify the Admin of the requested changes to the member profile. The Admin will then be able to approve or reject the changes. The system will then send either a “rejection” or “approval” E6 email letting the member know whether the changes were accepted or not. These emails will be very similar to the registration rejection/approval emails described above.

Directory

The directory will contain as many service providers as possible (relevant to CUSTOMER) with a main objective of becoming the “web authority” for moving, storage, and related niches.

While users are navigating in the directory (see Directory Report in GDG) and see the lists of relevant providers under each of the categories, no contact information will be displayed along any of the listings. There will be a link next to each listing so users can see more information about the service provider and get their contact information. This will found the basis for a revenue-generating business model where you could charge members per impression of their profile page or per contact info provided to users. It will also allow for better tracking the performance per member.

When users click on one of the listings, a unique “profile report” page (see GDG) would open showing more information about the service provider. Active (paying) members will have their contact information displayed on their profile so users can contact them directly. Non-active members (past members who stopped paying, and eventually all moving companies in NY, and many related service providers) will still have a profile page, but their contact information will not be displayed so visitors cannot contact them. The reason to display non-members on the site is Search Engine Optimization. It will help ranking well in search engines when potential users search for company names (service providers listed in the directory). This will also be an incentive for non-members to actually become members, since only if they are members they can access their profile, and receive the leads.

Directory Search/Filtering:

- By Category (the category selected will be one of the service categories of the member)
- By County (The county selected will be included in the member’s region(s))
- By ZIP Code (The ZIP code selected will be in one of the member’s region(s))
- By Name (The name search box will dynamically show a list of the names starting with the characters entered)

The detailed instructions on the filtering are in the GDG.

The resulting list will be sorted based on two criteria: First, it will display all relevant active members who meet the search/filtering criteria, and then the non-members. The non members will be displayed differently (e.g. dimmed). Within each of these two lists, results will be displayed in alphabetical order.

Each list item will have the following fields visible to visitors who are browsing the directory:

- Business/Service Provider Name
- Business Logo or Image
- Short Description (up to 250 characters)
- Service Categories (up to 5 categories)
- A link to view the full profile and contact info

Profile pages of non-active members will have a unique URL and contain the following:

- Business/Service Provider Name
- Business Logo or Image
- Short Description (up to 250 characters)
- Service Categories (up to 5 categories)
- Full Description (up to 500 words)
- Contact form to Email CUSTOMER instead of the business (no email address displayed on page for privacy reasons). Upon submission, the system will send email E10 to the Admin (not the business).

Profile pages of active members will have a unique URL and contain the following:

- Business/Service Provider Name
- Business Logo or Image

- Short Description (up to 250 characters)
- Service Categories (up to 5 categories)
- Full Description (up to 500 words)
- Contact Name
- Full Address of Business
- Telephone/Fax numbers
- Contact form to Email the business directly (no email address displayed on page for privacy reasons). Upon submission, the system will send email E9 with the info from the form to the service provider and it will be counted as a lead that was provided by CUSTOMER. This will also allow better conversion tracking on the site, and could be later used for a business model where members pay per lead provided.

Informational Section

This section will be implemented as a blog where posts are sorted in chronological order. Each page (post) could contain text, images, videos and an easy to use WYSIWYG interface will available for easy maintenance by Admin.

Pages could easily be sorted into categories as suggested below:

- For Members
 - Education
 - Industry News
 - Legislative
 - Regulation
 - Movers News
 - Photo Gallery
 - Events
- For Consumers
 - Moving & Storage Tips
Example: How to choose a mover
 - Videos (we recommend uploading the videos to YouTube and embedding them on the site)

VirtuosOnline will create up to 5 pages/posts under each category listed above. Additional posts/pages could easily be added by Admin via the control panel or a request could be sent to VirtuosOnline asking to upload new content as part of maintenance after the site goes live. Should there be a need to create more pages before the site goes live, VirtuosOnline will implement the requested changes and additional fees may apply.

CUSTOMER Admin will be able to easily create new pages/posts under the desired categories, add and format text and multimedia, add/delete/change categories and organize category hierarchy.

Admin will be able to make certain posts “private” – and only active members with a password will be able to view them. Non-members who try to view these private pages will see a notification saying the page is only available to registered members and encouraging them to apply for membership.

About CUSTOMER

This section will contain a collection of informational pages about and related to the association.

Suggested pages are:

- About CUSTOMER
- CUSTOMER Board
- Membership Advantages
- **Membership Application (static form + thank you page)**
- **Contact CUSTOMER (static form + thank you page)**
- Legal
- Privacy
- Terms of Service

Admin will only be able to edit static pages in this section (not static forms).

Password Protected Section (active members only)

This section will contain the following pages:

- Login (plus form for password reminder)
- Logout (all users will be sent to this page as they logout)
- Welcome (dashboard)
- Profile (where they can submit an edit to their information presented on the site)

Members Registration

Membership applicants will be able to apply for membership through the website. All applications will be approved solely by Admin, and only if approved, the applicant will be able to access password-protected sections of the site.

Application will be done with a static form asking applicants to provide information about their business (all required unless otherwise stated):

- Business Information
 - Business/Service Provider Name
 - Short Description (max 250 characters)
 - Full Description (max 2500 characters)
 - Business Type (individual proprietorship, partnership, corporation)
 - Date Established
 - Service Categories (up to 5)
 - Service Regions (up to 5 regions) - will be entered by the admin
 - Website URL (optional)
 - Contact Information
 - Owner/Officer Name + Title + Direct Phone
 - Full Address of business
 - Local/Main Phone
 - Toll Free Phone (optional)
 - Fax (optional)
 - License Information
 - NYS DOT
 - MC
 - US DOT
- Additional Business Information
 - At current location since (year)
 - Van line affiliation (optional)
 - Total storage area (SF) – optional
 - Area devoted to self-storage facilities (SF) – optional
 - Area devoted to warehouse facilities (SF) – optional
 - Offices and storage are (owned, leased)
 - Bank details (name, address, contact person optional)

- Membership information
 - Type (movers & warehousemen, associates, sustaining, company branch)
 - Name of existing member that can recommend you
 - Industry associations you are a member of (multiple selection, prepopulated by Admin)
 - Why do you wish to join the CUSTOMER (up to 500 characters)
 - Have you ever been a member of the CUSTOMER (yes, no)
 - Honors for the community, civic or other achievements (up to 2500 characters)
 - NOTE: a field will indicate whether the member is active or not, this is visible only to Admin and only Admin can change the status of a member.

- Contact Person
 - Name of contact person in the business
 - Email address of the contact person (used for on-going communication) (eAdr1)
 - Email address to forward leads to (eAdr2)
 - Reachable Telephone of contact person (for on-going communication, not leads)
 - User name (unique per user, validated by system for duplicates)
 - Password (validated by system for minimum security, characters will be displayed as asterisks)
 - Up to 2 other fields to be defined by CUSTOMER before implementation starts.

Members (Active registered users of the system) will be able to edit their profile information if they login. Any such change requests will have to be approved by Admin as detailed above.

Each membership application request will be stored in the database with one of three statuses:

- Candidate (from registration until rejection/approval by Admin)
- Non Active (after rejection or admin decision to change status (e.g. for non payment)
- Active (after approval)

To clarify: each member (movers & warehousemen, associates, branch, sustained) can be either active or inactive.

VirtuosOnline will upload existing member data into the system once. The data should be provided in Excel (or other DB-standard) format which will be provided by CUSTOMER before implementation starts. This is only applicable if the current info is full and accurate. If not - it is better to request all members to register again, using the registration form.

Admin Capabilities (see GDG, admin forms, admin reports)

- Approve/Reject membership applications
- Change the status of a member or registered user(from active to non active and back)
- Approve/Reject member information change requests
- Change the details of a member or registered user
- Manage Lists (regions, counties,countries, zip codes, service categories) (see GDG “Manage lists”)
 - Associate between counties and regions
 - Associate between zip codes and counties
 - Organize service categories hierarchically.
- Add/remove/edit the content of static pages throughout the site (using Drupal tools, if exist)
- Add/modify/delete content to the blog in the Consumer Info section (using Drupal tools, if exist)
- Add/modify/delete content to the blog in the Member Info section (using Drupal tools, if exist)
- Generate a “members report” showing all members (indicating active/inactive/and more) and export this report to Excel file (see GDG “Admin Report”)
- Edit the text of the system generated emails

System Parameters

The system parameters will be controlled by the admin only, who will be able to edit the contents of the fields.

The system parameters are:

- The email address from which the system generated emails will be sent
- The email address of the admin)

Clarifications

1. Content:
 - a. All content (text, photos, images, videos, and more) must be provided by CUSTOMER after proof reading. This proposal does not include proof reading or content quality assurance services. Any changes to text, graphics, or other content provided by CUSTOMER may result in additional charges.
2. Database:
 - a. At all times, any data that is stored in the database will only be available to the system so website visitors will never be able to access the data unless it is presented to them on a web page, as part of the data presented by the system.
 - b. CUSTOMER will not have direct access to the database itself (unless they specifically request access, assuming they have database programming knowledge and take full responsibility of consequences that might be caused). However, CUSTOMER will be able to manipulate the data and operate the system from the control panel, as described in the Admin Functionality section below.
3. System Emails Clarifications:
 - a. VirtuosOnline will design one mailing-template branded like the website, which will be used for all system emails.
 - b. CUSTOMER will not have a way to customize any of the system emails prior to them being sent out, besides simple text editing. The information in these emails will be dynamic so emails could be personalized automatically by the system. Since these changes require knowledge in Email Programming, HTML and other technologies, and because changes to these emails could easily cause the system to malfunction, any changes to system emails can be requested with a clear explanation of the changes needed and VirtuosOnline will gladly implement, possibly for additional cost.
4. Information Hierarchy and Site Structure
 - a. All pages will have a unique, search engine friendly URL