

# SE "3.0" | Mobile First

## Priorities, Stories & Acceptance Criteria

### INBOUND Facebook Messages - Posts & Comments (9/25)

Feature	Layer 1 - Timeline View	Layer 2a- Post Drill in View	Layer 2b - Comment Drill in View
Add a comment to thread	Yes	Yes	Yes
Assign/Claim <b>Post</b>	Yes	Yes	No
View Comments	Only up to the 2 most recent comments.	Yes - Can view all Comments	Yes - Can view all Comments, but they should be collapsed by default with the exception of the comment selected.
Assign/Claim <b>Comment</b>	No	No	Yes
Comment on a comment	No	No	No
Tag a post	Yes	Yes	No
Tag a comment	No	No	Yes
Send post as email	No	Yes	No
send comment as email	No	No	Yes
Archive post	Yes - if a post is archived, comments will no longer show up in the inbox (on mobile only?)	Yes	No
Archive Comment	No	No	Yes - Will no longer show up on the thread if the post isn't archived. OR can show up as unavailable (needs testing)
Delete Post	Yes	Yes	No
Delete Comment	No	No	Yes

View total likes on Post	Yes	Yes	No
View total likes on Comment	n/a	n/a	n/a
Show Post action footers	No	Yes	No
Show comment action Footers	No	No	Yes
View comments total (number of comments) on a post	Yes	Yes	No
View Status (assigned, completed, closed...)	Yes	Yes	Yes

### INBOUND Twitter Messages - Mentions, Replies, DMs, Tweets

**Note:** "Tweets" are messages that are pulled into the SocialEngage DB from Search, Lists, or other external means by appending the metadata of this message via adding a tag or assignment.

Feature	Layer 1 - Timeline View	Layer 2 - Drill in View	
Reply (public or DM)	Yes	Yes	
Retweet (only non-DM's)	Yes	Yes	
Quote	Yes – could be No... depends on spacial limitations.	Yes	
Assign/Claim	Yes	Yes	
Tag	Yes	Yes	
Send as email	No	Yes	
Archive Tweet	Yes	Yes	
Show action footers	No	Yes	
View Status (assigned, completed, closed...)	Yes	Yes	

### ACTIVITIES:

1. Assignment (Twitter & Facebook)
  1. Assigned by other to other: "Eli Frey assigned this message to Meg Christolini" <time> - <date>
  2. Assigned by you to other: "Eli Frey assigned this message to you" <time> - <date>
  3. Assigned by other to you: "You assigned this message to Meg Christolini" <time> - <date>
2. Claimed (Twitter & Facebook)
  1. Claimed by other: "Claimed by Meg Christolini" <time> - <date>

2. Claimed by you: "Claimed by you" <time> - <date>

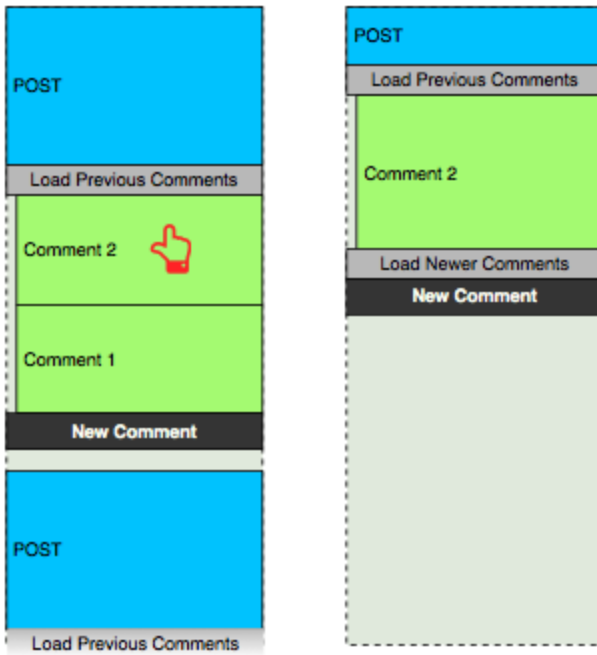
RESPONSES:

1. Response (Twitter & Facebook)
  1. Response by you or other: "Meg Christolini responded via NTOoutfitters" <time> <date>
  - 2.
  - 3.

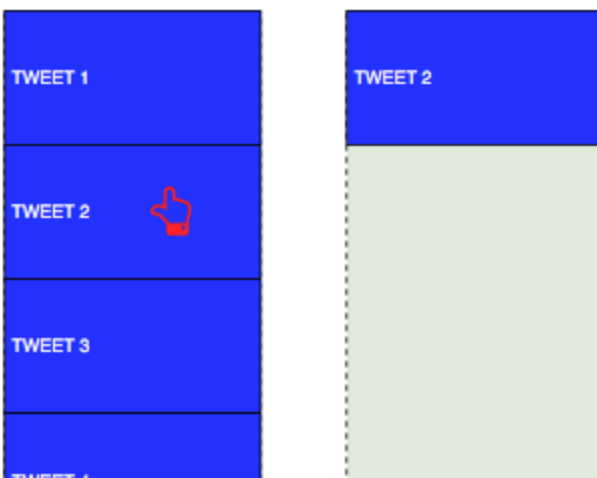
Facebook Post  
Drill-in



Facebook Comment  
Drill-in



Tweet Drill-in



## Megaphone / Publisher (9/24)

Feature	Compose Megaphone	Reply Megaphone
Select medium	Yes	No
Select outbound channel(s) - of the same medium	Yes	Yes
Select Message type	No - It's a FB post or TW Tweet	(FB) = No (TW) = Yes (1.1)
Select Recipient - Twitter Reply	N/A	No (1.2)
Select recipient - Facebook Comment	N/A	No (1.3)
Twitter RT/Quote	Yes - RT's (2.1) and Quotes (2.2) should be routed through the compose megaphone flow.	No
Approvals	Yes	Yes
Snippets	Yes	Yes
Targeting (FB)	Yes (FB), No (TW)	No
Scheduling	Yes	Yes
Draft	Yes	Yes
Reply - preview of message you're replying to	N/A	Yes (1.4)
Photo upload	Yes	No
Link shortening	Yes	Yes

### Additional Requirement Details:

1.0

Message types should be marked in the megaphone - Post, comment, Tweet, RT, Quote, Public Reply, DM

1.0.1

The only modifiable message type is Public Reply v. DM there should be toggle between these two options.

1.1

When replying to a tweet or DM, the SocialEngage user should have the option to toggle between sending the user a public reply or private DM.

1.2

When replying to a Tweet I should not have the ability to adjust the recipient. The recipient should be shown and locked.

1.3

When replying to a post or comment the response may only be added to the thread you are responding to on the channel the post or comment originated on.

1.4

When replying to a Tweet, Post, or adding a comment the user should have a preview of what they are resounding to.

1.4.1 Reply to a post - show post

1.4.2 Reply to a comment (which adds a comment to the post) - show post

1.4.3 Reply to a Tweet, DM, RT, Quote, Reply - preview original Tweet


2.1

When RT'ing a tweet the SE user should be routed through the compose megaphone flow, but the message should not be editable.

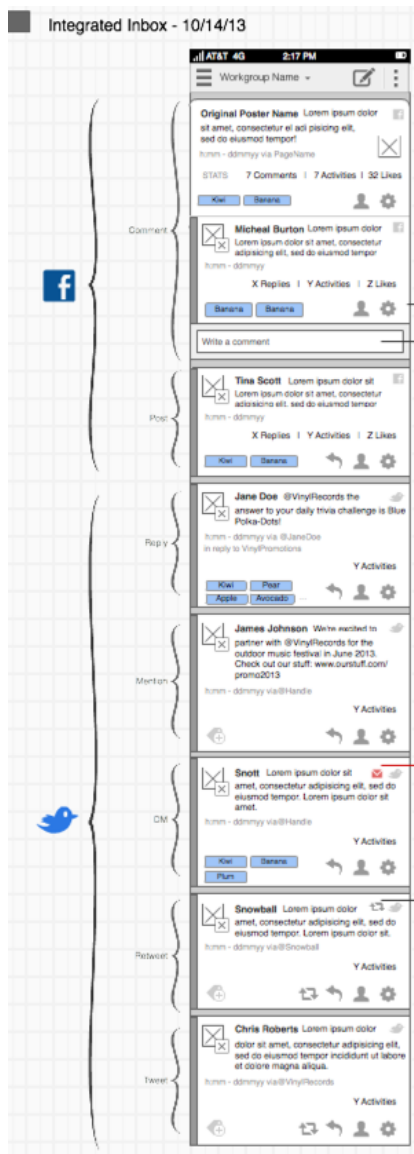
2.2

When Quoting a tweet the SE user should be routed through the compose megaphone flow, the tweet should be editable. A editable "via @originalsenderhndle" should be appended to the end of the tweet, but the user should have the ability to erase this text.

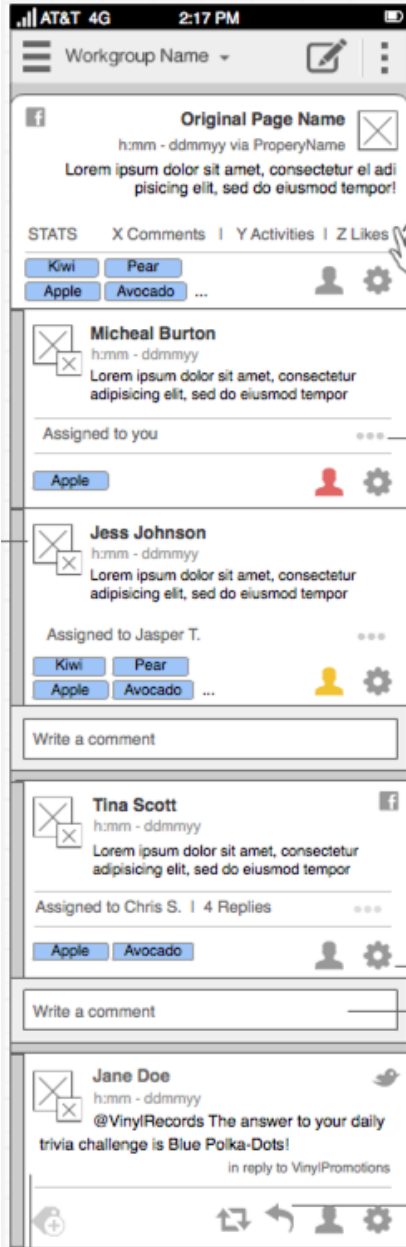
# P1

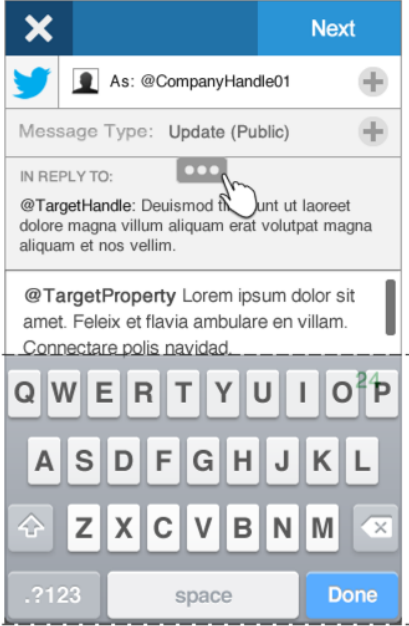
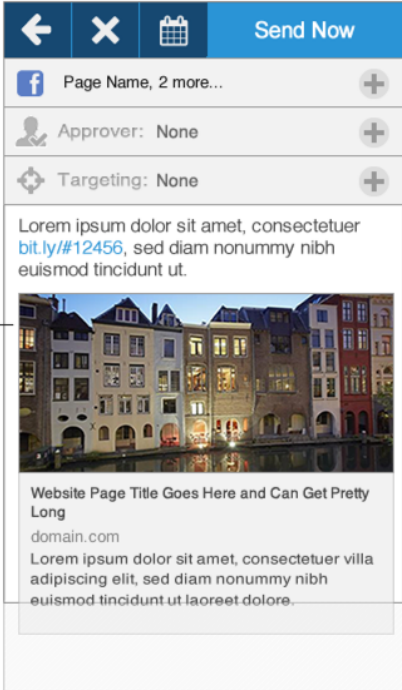
#	✓	Story	Exists Now?	Idealized Workflow	Acceptance Criteria
001	✓	User wants to know and switch workgroup(s)	<b>New</b>  [needs to be built in web version first]	Design for groups within groups in mind; user can view and organize groups a la Google Circles 	-User should have the ability to view all the WG's that they are a member of. -A user should <i>not</i> have the option to select workgroups in which they are <i>not</i> a member of. -User may only select to view a single WG at a time. -Data should load instantaneously upon selection of a WG.

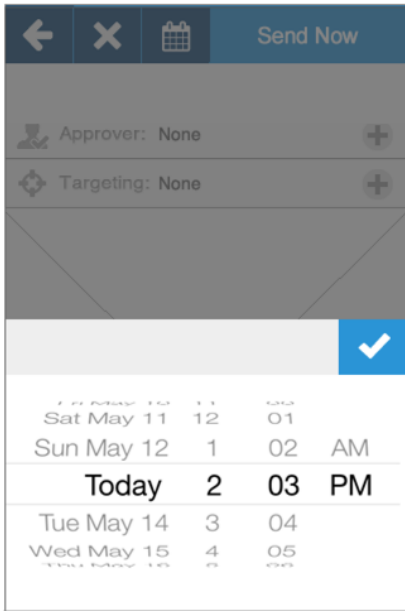
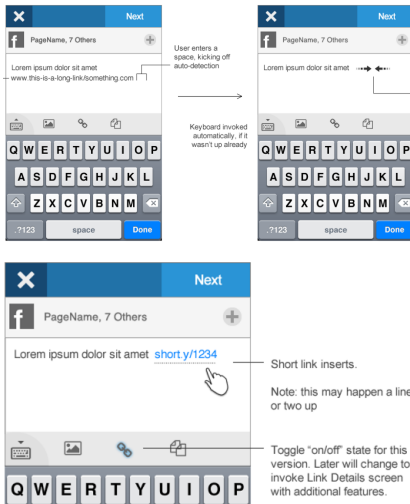


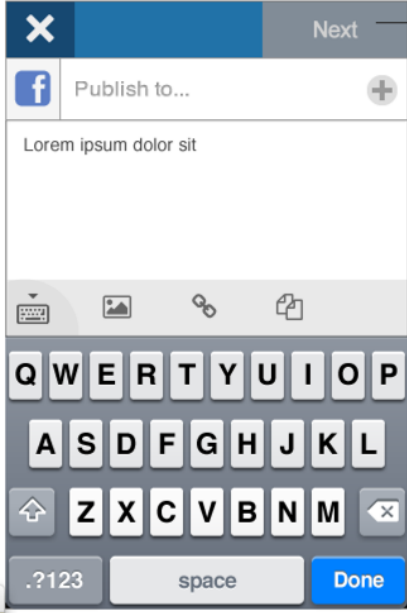
					
003	✓	User wants to respond to message / create message (reply, DM, comment) (outbound)		<p>User easily finds messages that require response. Can easily reply. Upon selection, user creates a reply that reveals publishing interface with a input and preview.)</p>	<p>-Users should have the ability to reply to <b>inbound</b> messages:</p> <p>Twitter: Tweet, Mention, DM, Reply, RT, Quote</p> <p>Facebook: Post, Comment, (Page message - coming soon)</p> <p>-These messages should be visible in the sent folder</p> <p>-The message's sender (SocialEngage user) should be noted.</p>



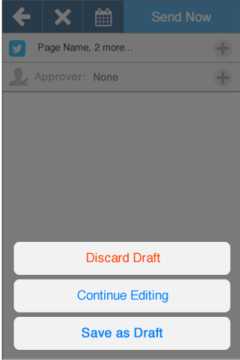


					
004	°	User wants <b>schedule</b> , view and <i>edit</i> <b>scheduled</b> message(s)	<b>Edit is new;</b> Can schedule and view now		<p>-User wanted to be able to add text, photos, links, snippets, FB targeting (is applicable) to a message prior to scheduling or drafting.</p> <p>-User should see an obvious Schedule CTA in the “megaphone / publishing UI view”</p> <p>-If viewing a saved scheduled message the time scheduled should be displayed.</p> <p>-If viewing a saved scheduled message, the user should have the ability to modify all the message’s objects (links, photos, text, etc.)</p> <p>-If schedule a message the user must schedule at least 10 min into the future. This timer should not allow a user to get into an error state.</p> <p>-Scheduled messages may be deleted from the outbox via mobile.</p> <p>ROLES:</p> <p>-All roles can view outbox/scheduled messages</p> <p>-WG Leaders/Contributors can edit scheduled messages.</p> <p>-WG Leaders/Contributors can delete scheduled messages.</p> <p>-WG Leaders/Contributors can create</p>

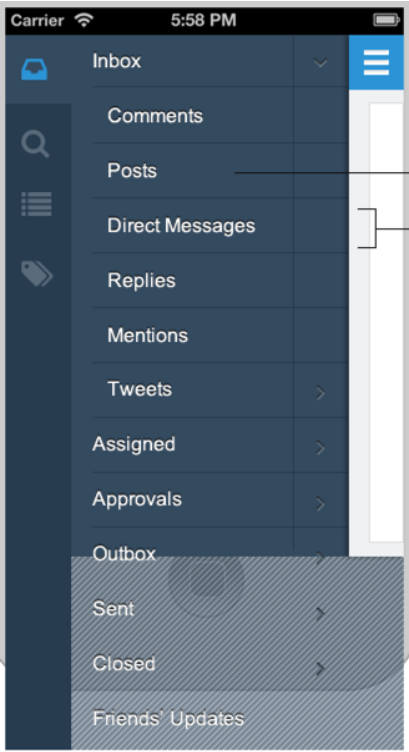
					scheduled messages.
005	✓	User wants to shorten link in the megaphone	<b>Auto shortening is New</b> ; plan to keep for V1  (megaphone); Related to cotag UC #207 below	<p>Automagically shorten link and/or manually shorten/unshorten the link</p>  <p>- <b>005-A</b>: When a user types or pastes a URL into the megaphone it should be automatically shortened. - Cot.ag shortener is the default option - If the user has added their own bit.ly account via the webapp all URLs shortened should be run through the user's bit.ly account. <b>PERMISSIONS:</b> -WG Leader/Contributor - must have one of these roles to access the megaphone. - <b>005-B FUTURE:</b> If we allow more than one shortener option for tracking purposes, the user should have the option to select which one they would prefer upon entry of a url into the textbox.</p>	
006	✓	User wants to send outbound message (post, tweet, RT, quote)			<p>-Users should have the ability to send outbound messages: Twitter: Tweet Facebook: Post</p> <p>-These messages should be visible in the send folder</p> <p>-The message's sender (SocialEngage user) should be noted.</p>

					
007	°	User wants to assign and view assigned messages			<ul style="list-style-type: none"> <li>-Messages may be assigned to or claimed by any workgroup contributor or leader.</li> <li>-Workgroup viewers should not be available on the assignments list.</li> <li>-Invited, unconfirmed workgroup members should not show up on the assign to users list.</li> <li>-Messages that are assigned should gain an action footer including the time in which the assignment was made and who the assignee is.</li> </ul>
008		User wants to claim and view claimed messages			<ul style="list-style-type: none"> <li>-Any workgroup loader or contributor should have the ability to claim a message.</li> <li>-The message should obtain an action footer including the user's name who claimed the message and the time stamp.</li> <li>-The user should have the option to undo a claim, creating an additional action footer.</li> </ul>
009	✓	User wants to tag inbound messages			

					
010	✓	User wants IMH sign-in			EF - A link on login screen <a href="#">Login to Interactive Marketing Hub™</a> 
011	✓	User wants character counter (140 max for Twitter)			
012	✓	User wants to create, view, edit draft messages	have	User either starts in message create/composition part of the app and can choose to 1. save a draft or 2. not save when they cancel/stop editing message. (See Twitter)	


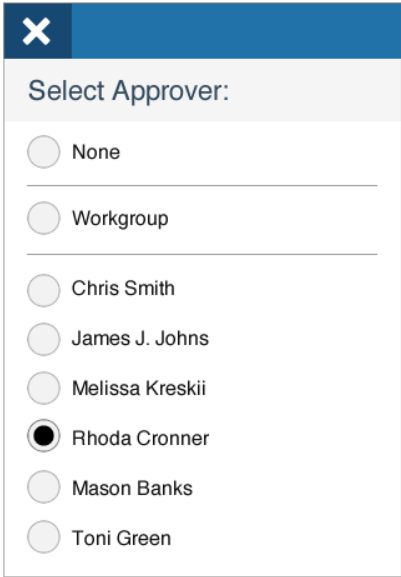
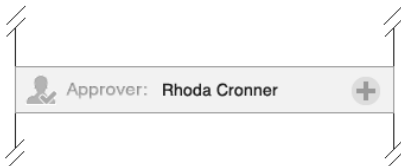
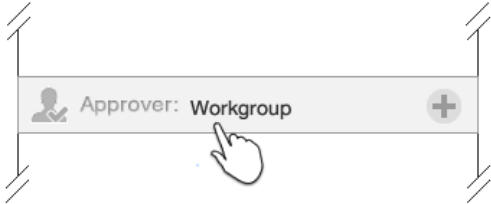
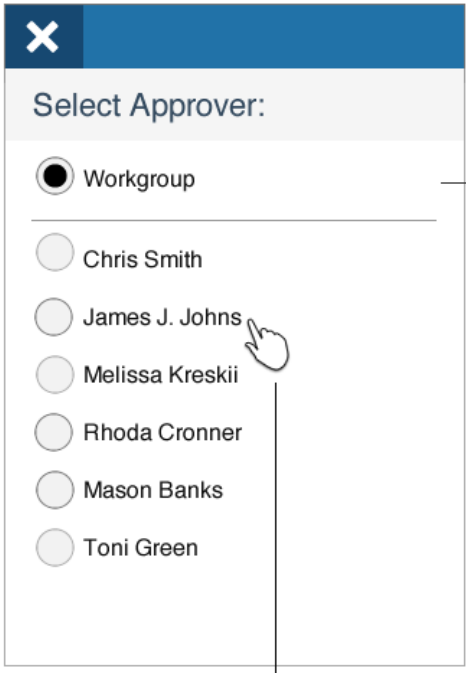
				<p>Use iOS7 "Alert" or "Action Sheet"</p> 	
013		User wants to remove a message			
014	✓	<p>User wants to access</p> <p>A. Conversation / message history</p> <p>-and/or-</p> <p>B. information about person/profile</p>	<p>have</p> <p><b>New: Notes</b></p> <p>right now: go into message detail &gt; i &gt; &gt; tabs on the bottom (profile, history, notes, all updates). four tabs there are all core.</p>	<p><b>03/01 - EF</b></p> <p>User taps message details and can easily choose to view history type A or B.</p> <p><b>06/05 - EF</b></p> <p>From profile:</p> <p><b>014-A.1</b></p> <p>User wants to look up another profile</p> <p><b>014-A.2</b></p> <p>User wants to take action on message from here (reply / retweet).</p>	<p>Assuming we enter from Messages. Note branch: I want to know</p> <p><b>014-A. Person info</b></p> <p>If Person then... Show profile picture, name, handles, tweets, followers, following (See Twitter profile)</p> <p><b>014-B. Message info</b></p> <p>If Message... tag, see any message history, actions: reply, assign, claim, archive, delete, translating, flagging</p>

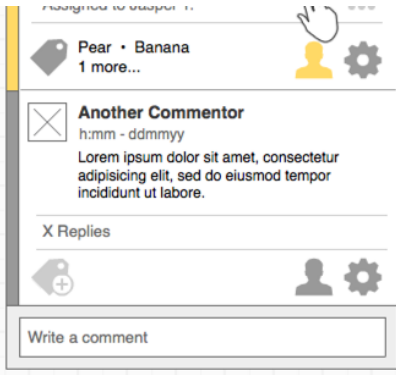


		focused)			
016	✓	User wants recognizable language placement and hierarchy between web and mobile applications (filters, folders and other parity)		<p>User finds verbal and architectural parity.</p> 	
017	✓	User wants safeguard to confirm a message before sending	--	<p>Solve in publishing UX:</p> <p>EF - Publishing now two-step process. Second screen includes preview where user can sanity-check prior to send; ideally, could include “Undo” feature.</p>	



				<p>Step 2: Send Now or Schedule</p>	
018	✓	User wants logout / finds logout functionality easily	Have. hard to locate.	EF - User swipes right to reveal CTA for Logout in right panel	
019	✗	User wants to “flag” message for attention	<b>HOLD</b>		Note: not for v1

020	✓	User wants Submit for approval	Have	<p>EF - From megaphone, user selects / taps an option to “Add Approver” (If user requires approval, “Approver: Workgroup”) and can select/edit approver on screen x.2</p>   	 <p>SCENARIO B: User <b>does</b> require approval</p> 
021		Re-submit for approval	Have	EF to add...	Meg to add...

022	✓	User wants to view and write Comments on Comments	<b>New; Needs to be in v1</b>		<p>Documentation: <a href="#">PM</a>   UX</p> <p>Same as sample shown left but with double-indent and input label “Write a comment reply”.</p>
023		User wants to see link preview on facebook (could have one or more links)	<b>Have</b>	<p>When user has a shortened link in facebook megaphone, they can preview link image and meta data as it will appear on native network</p>	<p>10/22/13</p> <ol style="list-style-type: none"> <li>If one and only one URL is added to the megaphone should result in a preview of available metadata for that URL.</li> <li>If a URL is added to the megaphone and a preview is generated, then one or more URLs are added to the megaphone: <ul style="list-style-type: none"> <li>V1: We should show the preview of the first URL by default.</li> <li>V2: We should allow users to page through the URLs to select the preview they would like to publish. *We will implement this pre-launch time permitting*</li> </ul> </li> <li>If the user has a URL adds a new URL, then removed the original URL by erasing the text, the preview of the original URL should remain unless deleted via deleting the preview (X).</li> </ol> <p>Some other requirements to consider:</p> <ol style="list-style-type: none"> <li>Emails (meg@foo.com) can not be shortened.</li> <li>One and only one image can be uploaded at a time for Twitter and Facebook. Uploading a new image will replace the existing one – so there is no multi-preview handling or conflicts here.</li> <li>If a long URL is added via snippet it should also be auto-shortened.</li> </ol>

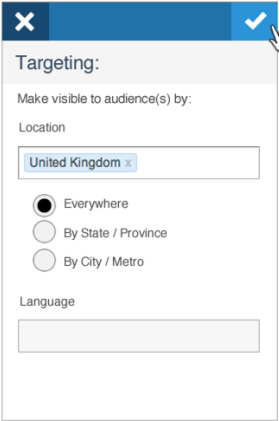
## Coming Soon

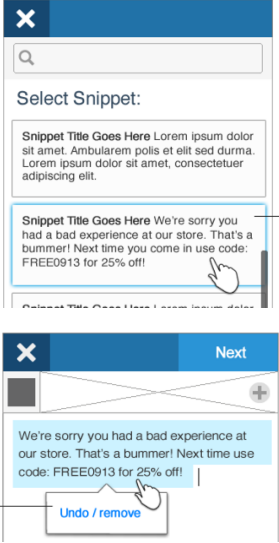
- Comments on Comments **(filed as #022 above)**
- Page messages coming soon (related to #003)

## Known "Pain Points"

- **Not clear how to create a new message** (related to #006, #003)
- Actions menu is hard to find (Android) [know bug: tabs in “info” for notes, convo history, etc. missing in Android]
- Users don’t understand where to log out **(filed as #018 above)**
- Megaphone is not “safe” **(filed as #017 above)**
- Filters/folders don’t align with the web **(filed as #016 above)**

## P2

#	✓	Story	Exists Now?	Idealized Workflow	Acceptance Criteria
101	✓	User wants to Target facebook posts	<b>New target for v2</b>	EF - User can select / configure targeting options in Publishing UI near SocialProperty selection (i.e., Facebook) to which it is related <div>  </div>	
102	°	User wants to do Image uploads	[goes with outbound marketing use case; #006 above]		
103	✓	User wants to ability to apply a snippet	<b>New (to mobile); target for v1</b>	User can apply a snippet to outbound message (note: not include ability to create).	-Users should have the ability to reply to inbound messages: Twitter: Tweet, Mention, DM, Reply, RT, Quote Facebook: Post, Comment, (Page message -

					<p>coming soon)</p> <ul style="list-style-type: none"> <li>-These messages should be visible in the sent folder</li> <li>-The message's sender (SocialEngage user) should be noted.</li> </ul>
104	✓	User wants to search for social activities and/or messages	Yes. Twitter & Facebook search on API		
105		Translate		Actions menu?	
106	✓	Send message as an email	new to mobile	EF - Added to actions menu	

### P3

#	✓	Story	Exists Now?	Idealized Workflow	Acceptance Criteria
201	°	User wants ability to archive messages			
202		User wants ability to tag <i>outbound</i> messages	<b>Outbound is new</b>		
203	✓	Multi-channel publishing		publishing to 2+ channels in the same medium at the same time	

204		Twitter lists			
205		Blocking users			
206		Reporting to @spam (Twitter)			
207		Cotags			
208		Forgot password	New (shooting for v1)		

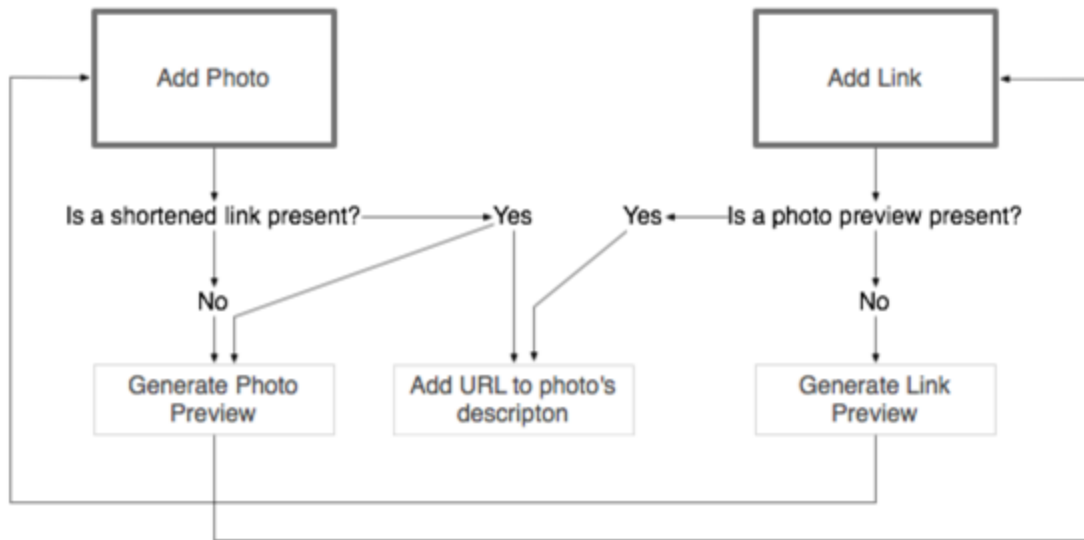
## Megaphone / Publishing Specific

### Core Requirements:

1. The Publishing UI is only available to *Workgroup leaders*, *Contributors* and *Custom* configs where a user has a mix of channel permissions. [Publishing UI **not** available to Viewers]
2. A user will only have access to the Twitter and/or Facebook publishing if they have channel and workgroup roles that make this an option.
  - Take this into account in the main messages view
  - Explore the UX from all user POV's

Medium = facebook or twitter (Social Network)  
 Channel / Social Property = twitter handle, facebook page name

### When to Show Link vs. Photo Preview



#### Basic rules:

1. If a link is added and no other media exists, a link preview should be generated.
2. If a photo is added and no other media exists, a photo preview should be generated.
3. If a photo & photo preview is existing, then a link is added & shortened – the preview should remain a photo, the post type should be photo, and the shortened URL should be added to the photo's description in the text box.
4. If a shortened link & preview is existing, then a photo is added, the link preview should be replaced with the photo preview. The text of the URL should remain in the megaphone.
  1. If the Photo is deleted, and the shortened link is still present, the link preview should return.
  2. The short/long URL toggle should continue to function, but will not effect the photo preview if present.
  3. If the photo is deleted and a link link is present, no preview will be generated and the post will be plain text.

## Twitter Publishing UI

	Text - Update	Reply	DM	RT	Quote
<b>Medium (Network)</b>	✅ Select ( <i>via Channel really</i> )	Preselected ( <i>i.e., is Twitter</i> )	Preselected	Preselected	Preselected
<b>Channel(s) (@Handle)</b>	✅ Select	Preselected with a select option	Preselected with a select option	Preselected with a select option	Preselected with a select option
✅ <b>Text</b>	Available for addition	Available for addition	Available for addition.	Not available - The text of an RT is locked.	Text of tweet is added w/ "Via @original author" - see the web app.
✅ <b>Snippet</b>	Available for addition	Available for addition	Available for addition	n/a	Available for addition

<b>Add/remove CoTag</b>	[ ] Toggle - if set, not added by default	Toggle - if set, add by default	Toggle - if set, add by default	n/a	Toggle - if set, not added by default
<b>Link Shortening</b>	Available for addition	Available for addition	Available for addition	n/a	Available for addition
<b>Targeting</b>	n/a	n/a	n/a	n/a	n/a
<b>Photos - as a link</b>	[✓] Available for addition	[✓] Available for addition	[✓] Available for addition	n/a	Available for addition
<b>Select an approver</b>	[✓] Available for addition	Available for addition	Available for addition	Available for addition	Available for addition
<b>Submit for approval</b>	availability pending permissions or approver selection	availability pending permissions or approver selection	availability pending permissions or approver selection	availability pending permissions or approver selection	availability pending permissions or approver selection
<b>Draft</b>	Available	Available	Available	Available	Available
<b>Schedule</b>	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings
<b>Publish (send)</b>	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings
<b>Cancel</b>	Available	Available	Available	Available	Available

## Facebook Publishing UI

	<b>Text - Status Update</b>	<b>Image</b>	<b>Link</b>	<b>Comment</b>
<b>Medium (Network)</b>	Select	Select	Select	Pre-selected & Locked (i.e., <i>Is Facebook</i> )
<b>Channel (Page)</b>	Select	Select	Select	Pre-selected & locked (i.e., <i>Is Facebook page X</i> )
<b>Add/Remove CoTag</b>	Available for addition - not added by default	Available for addition - not added by default	Available for addition - not added by default	Available for addition - not added by default
<b>Shorten Link</b>	[✓] Available for addition - will only be text	[✓] Available for addition - will be added to the	Available for addition - first link added will be	Available for addition - will have an optional



		photo's caption	the post-link. Additional links will be text	preview on Facebook (see #023 above).
<b>Targeting</b>	Country(s) -and- State(s)/province(s) -or- city/metro(s)  AND/OR  Language(s)	Country(s) -and- State(s)/province(s) -or- city/metro(s)  AND/OR  Language(s)	Country(s) -and- State(s)/province(s) -or- city/metro(s)  AND/OR  Language(s)	n/a
<b>Photos</b>	Will turn to a native photo post	Main post	Will turn to a native photo post	n/a
<b>Select Approver</b>	Available for addition	Available for addition	Available for addition	Available for addition
<b>Draft</b>	Available	Available	Available	Available
<b>Schedule</b>	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings
<b>Publish</b>	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings	Available - pending approval role settings
<b>Cancel</b>	Available	Available	Available	Available
<b>Snippet</b>	Available	Available	Available	Available

----- REQUIRED FOR RELEASE -----

### Coming Soon & should be considered in UX

- Approvals (submit for approval and approvals folder)
- Push notifications
- Mobile optimized email notifications – if a user checks email notification in the mobile app > clicks an “action button” > the user will be routed to the SE mobile app vs. the web app in their mobile vrowser.
- Page messages

## Will not support on mobile

- Visible integration
- Flagging - **added 6/05/13**
- Twitter trends
- Narrowcasting

- Settings (workgroup, user and channel management)
- Multi-medium publishing (publishing to twitter and facebook at the same time)
- Creation of tags and snippets
- Password reset

## Whiteboard from meeting (2/23)

Mobile "Universe"

