USE CASES

Purpose

The following Use Cases are intended to supplement the Story Board for eBusiness 1.0.

They are intended to provide a step-by-step walk through as to how a user would interact with various parts of the system.

These Use Cases will be signed off by all parties and used to generate test data for Acceptance Testing.

Use Case "Chunks"

These Use Cases are broken down into "chunks" of 10 steps or fewer (in most cases.) The intent is to keep the system in manageable pieces and prevent overwhelming those involved. Full testing will involve pulling together various "chunks" into full scenarios that match real customer situations.

Use Case Naming Convention

Where practical, the Use cases have been named using a "first step – last step" convention to aid in clarity.

Common Vocabulary

The following items and abbreviations are used throughout this document.

Administrator: Determines rights and privileges or users of XYZ Services.

Campaigns: Series of emails sent to a specified group of email addresses, and may or may not include attachments.

CSR: Customer Service Representative.

Direct Customer: A corporation or enterprise that has a standing contractual obligation to purchase XYZ services and uses those services internally.

MSP: Media Services Provider (Similar to Application Service Provider.)

Primary Administrator: A XYZ Reseller or Direct Customer must designate one and only one person as Primary Administrator for XYZ services. This primary administrator will determine roles, responsibilities and privileges granted to other administrators and will have all the privileges granted to an administrator.

Recipient (Internet User): An internet user who (a) lands on a direct customer or reseller's client's web site (or) (b) receives a email from a XYZ Reseller's client or Direct Customer AND ultimately consumes XYZ services. Only Netscape and Internet Explorer users and recipients will be supported.

Reseller: An ISP, an ASP, an Ad Agency or System Integrator that has a standing contractual obligation to purchase XYZ services in quantity and distribute those services to their customer base.

Reseller's Client: A corporation or enterprise that purchases XYZ services through an authorized XYZ reseller and uses those services internally.

Skin: (custom video "skin"): Private Labeling one of the XYZ services that the Recipient sees. (Includes a custom logo, a click-through URL and customized text message.)

Storyboard: A technique used to help define system requirements based on the sequence of events seen by the customer or user of the system.

User: Someone who is using XYZ services to enhance ecommerce / emarketing sites or campaigns.

Visitor: An internet user that visits a XYZ site (XYZ has no information on record for this person.)

VIT: XYZ Co.ize IT abbreviation. (Video-enhanced emails.)

XYZ: XYZ Co. abbreviation.

VZ: XYZ Co. Zoom abbreviation.

Zoom-Clicks: When a Recipient clicks on a XYZ Co. Zoom image, the clicks are counted for billing and reporting purposes.

Account Tier Definitions:

- Tier 1 Account: A direct customer or reseller for which XYZ opens a account and offers credit terms.

- Tier 2 Account: A direct customer or reseller of a Tier 1 account for which XYZ holds the Tier 1 account responsible for credit terms and payment. XYZ will accumulate billing statistics. XYZ may or may not authorize demo account for Tier 2 customers.

- Tier 3 Account: A direct customer or reseller of a Tier 2 account. XYZ will accumulate billing statistics. XYZ holds Tier 1 account responsible for payment.

Use Case 1: Recipient lands on page with XYZ Co. Zoom Image - Recipient Views Zoomed Image

Summary of Storyboard Elements Involved

34, 36, 37, 38

Use Case Steps (In User-eze)

1. An Internet User running MS Explorer or Netscape Navigator hits an Ecommerce site that contains one or more VZ images.

2. User is asked to accept download of XYZ software that allows user to utilize VZ services.

   a. (optional) Email of the Recipient is captured and sent to the visitor database. (Visitor "belongs" to the company sending the email or displaying the images.

3. After accepting the download, while remaining in the VZ-enabled site, the user (now called Recipient) is able to view and control the Zoom image.

4. The Recipient's Zoom-Clicks are tracked by XYZ services.

Supporting Technical Detail

- Recipient views a page that contains HTML code to load the XYZ Co. Zoom plug-in on the client browser.
- The plug-in or ActiveX version will be verified by the XYZ Co. products, loaded, and will attempt to retrieve the .TCOD file specified in the URL parameter of the HTML code if the revision is current. If needed, the ActiveX DLL will be updated automatically based on the HTTP path and version number or the Smart Update will be downloaded and started.
- The MSP Server will receive the request, along with any extra parameters that the plug-in has specified.
- The MSP Server will log and control access or password levels
- The MSP Server returns the encrypted information to the client plug –in and/or browser.
- The client plug-in/browser will communicate with theXYZ Co. Zoom Server, which will receive the request, along with any extra parameters that the plug-in has specified.

- The XYZ Co. Zoom Server will log internal usage, which will be delivered to the MSP server at a later time to update the account.
- The XYZ Co. Zoom Server will return the data needed for the plug-in to display a zoomed image.
- The last three steps can be repeated without communicating with the MSP server until the client leaves that image and moves to another XYZ Co. Zoom image.

Use Case 2: User Chooses to Create Campaign – User Launches Campaign

Summary of Storyboard Elements Involved

62, 64, 28, 30, 29, 31

Sub-Case 2.1: Create Campaign

Use Case Steps (In User-eze)

A campaign is created by a user to send an email with zero or more attachments to one or more individuals.

What is unique about the campaign is that any attached video can only be viewed during a timeframe specified by the XYZ Co. customer and can be tracked as to usage.

1) User Initiates a campaign from one of the following ways:

   a) From the Content Management screen, a user will select a VIT file. From the Details Screen of this file, a user has the option to create a campaign. (or)
   b) Once a user has logged on to the system, there will be an option in the navigation bar that allows him/her to create a **new** campaign. (or)
   c) Once a user has logged on to the system, there will be an option in the navigation bar that allows him/her to re-send an **existing** campaign. Using this option will allow the user to re-send the exact campaign, or make minor changes before re-sending.

Note: After Sub-Case 2.1, User will choose the type of campaign (Sub-Cases 2.1.1 through 2.1.3)

Sub-Case 2.1.1 Create XYZ Co.ize It Campaign

Use Case Steps (In User-eze)

1) User logs on to "My XYZ Home Page" (62)
2) User selects campaign creation or management
3) (or) Using the Content Manager, the user selects a video file to use for the campaign.
    a) The user then chooses whether to include the actual video file as part of the campaign.
4) The user enters a timeframe for which the video can be viewed (Start / stop date or "Kill Date". This time limit is wrapped/inserted into the video file. This is independent of a campaign date.
5) The user enters the start date and end date for the campaign. (If User requires specific days, dates or times, User contacts XYZ professional services for assistance.)
6) The user fills in any required information about the campaign, including the email text and HTML text that will be sent as part of the campaign. (User may contact XYZ Professional Services for assistance.)
7) The user selects a distribution list. If desired, the user may instead elect to create a new distribution list. Please see the Distribution List Use Case for more information
8) The user selects "Submit my campaign"
9) The XYZ Co. system checks and confirms that all entries are valid prior to sending the information.
    a) If no, the user is informed of any invalid entries and presented with instructions to correct erroneous entries.
    b) If yes, the email is sent into the User's inbox. User accepts and campaign launchers or User rejects and returns to 9a.
10) The email, along with any attachments, is then forwarded to an email Marketing Campaign Service.
11) A confirmation page is presented to the user that lets him/her know the campaign request has been successfully submitted The user is informed that the campaign can be viewed through "My XYZ Home Page", allowing them to track the campaign status.
12) An entry will be made into the user's order history. The user's account is charged upon successful delivery of the email campaign.
13) The user will be notified if the order exceeds a predefined credit usage level.

Sub-Case 2.1.1: Create XYZ Co. Zoom Campaign

Use Case Steps (In User-eze)

1. Using the Content Manager, the user selects a XYZ Co. Zoom image for the campaign. The campaign will send an email message with a link to the Zoom image.

2. The user enters the start date and end date for the campaign. (If User requires specific days, dates or times, User contacts XYZ professional services for assistance.)

3. The user fills in any required information about the campaign, including the email text and HTML that will be sent as part of the campaign. (User may contact XYZ Professional Services for assistance.)
4. The user selects a distribution list. If desired, the user may instead elect to create a new distribution list. Please see the Distribution List Use Case for more information

5. The user selects "Submit my campaign"

6. The XYZ Co. system checks and confirms that all entries are valid, prior to sending the information.

    a. If no, the user is informed of any invalid entries and presented with instructions to correct erroneous entries.

    b. If yes, the email is sent into the User's inbox. User accepts and campaign launchers or User rejects and returns to 6a.

7. The email, along with any attachments, is then forwarded to an email Marketing Campaign Service.
8. A confirmation page is presented to the user that lets him/her know the campaign request has been successfully submitted. The user is informed that the campaign can be viewed through "My XYZ Home Page", allowing them to track the campaign status.
9. An entry will be made into the user's order history. The user's account is charged upon successful delivery of the email campaign.

10. The user will be notified if the order exceeds a predefined credit usage level.

Sub-Case 2.1.2: Create Text or Email Campaign with No Attachments

Use Case Steps (In User-eze)

1) Using the Campaign Creation page the user selects to create a new campaign or resend and existing campaign.

2) The user enters the start date and end date for the campaign. (If User requires specific days, dates or times, User contacts XYZ professional services for assistance.)

3) The user fills in any required information about the campaign, including the email text and HTML that will be sent as part of the campaign. This is where users will insert information that will allow the Recipient to be redirected to a web site or download information (this may include a VZ image or a VIT file). (User may contact XYZ Professional Services for assistance.)

4) The user selects a distribution list. If desired, the user may instead elect to create a new distribution list. Please see the Distribution List Use Case for more information

5) The user selects “Submit my campaign”

6) The XYZ Co. system checks and confirms that all entries are valid, prior to sending the information.

    a) If no, the user is informed of any invalid entries and presented with instructions to correct erroneous entries.

    b) If yes, the email is sent into the User’s inbox. User accepts and campaign launchers or User rejects and returns to 6a.

7) The email is then forwarded to an email Marketing Campaign Service.

8) A confirmation page is presented to the user that lets him/her know the campaign request has been successfully submitted. The user is informed that the campaign can be viewed through “My XYZ Home Page”, allowing them to track the campaign status.

9) An entry will be made into the user’s order history. The user’s account is charged upon successful delivery of the email campaign.

10) The user will be notified if the order exceeds a predefined credit usage level.

Supporting Technical Detail

The following list indicates which items will be logged for the Campaign system. Please note that this is not a complete list:

- Each request for a campaign
- Failed campaigns, defined as a campaign that didn’t deliver
- Failed email addresses, defined as email addresses that don’t exist or cannot be delivered to
- Failed email attachments, defined as Inboxes that don’t allow attachments
- Size of campaigns

- Number of completed emails as provided by e2 functionality (total minus returned invalid addresses)
- Number of videos executed as provided by XYZ Co. functionality and tracked by e2 functionality
- Number of Call to Actions as provided by XYZ Co. functionality and tracked by e2 functionality

Use Case 3: Recipient Receives Campaign Email – Recipient Lands on Directed Web Site

Summary of Storyboard Elements Involved

34, 39, 38, 40, 41

Use Case Steps (In User-eze)

1) Recipient receives campaign email in there inbox.

2) Recipient chooses to open email (if chooses to not open, use case is done.)

3) XYZ tracks that the email was opened.

4) Recipient arrives at directed Web Sit by:

    a) Clicking through on a link.

    b) Clicking on a VZ image

5) (optional step) Recipient clicks on a link that downloads a VIT (or other attachment) to them.

    a) If Recipient chooses to download VIT file (or VIT file is sent to them as an attachment), Recipient plays VIT file and watches video.

    b) XYZ tracks playing of video and presents Recipient with “Call to Action” link at end of message.

c) XYZ tracks whether or not Recipient clicks-through on “call to action.”

6) Recipient lands on directed Web Site.

Supporting Technical Detail

None

Use Case 4: User Downloads Required Software

Summary of Storyboard Elements Involved

26, 27, 7, 8, 9, 62

Use Case Steps (In User-eze)

1) User logs in to “My XYZ Home Page” and navigates to element 26 (Download Software Tools).

    a) If new software has been published, User is notified on their home page to navigate to element 26 (XYZ software download and maintenance) for software updates.

(or)

2) User logs in to “Sign-up and activate demo account” (element 7, 8 and 9) and navigates to element 26 (Download Software Tools).

    a) User is notified that a software download is required and directed to navigate to element 26 (XYZ software download and maintenance) for download.

3) System checks to see if this is first time to visit element 26. If so, connects User to element 27 (XYZ software download and maintenance.)

4) System also checks current version levels and directs out of date software users to element 26 (Downloads required software.), which, if needed, will connect user to element 27 (XYZ software download and maintenance.)

5) User follows directions and allows download of software to a local PC hard drive.

6) User follows directions and installs downloaded software applications.

7) Installed application communicates to element 27 (XYZ software download and maintenance) and logs (a) install successful or unsuccessful, (b) XYZ applications installed on this client, and (c) records version level of each installed application.

Supporting Technical Detail

None

Use Case 5: User Creates and Uploads Media –

Summary of Storyboard Elements Involved

62, 67, 28, 26, 27

Use Case Steps (In User-eze)

(If User Chooses XYZ Co.ize IT)

1. User enters element 62 (My XYZ Home Page) and selects element 28 (Create and Upload Media Content).

2. User is directed to element 26 (Downloads required software.) and/or 27 (XYZ software download and maintenance)

3. If need, User is directed to Use Case 4 steps 4 through 7.

4. User follows on-screen directions to select appropriate file type (AVI or other compatible digital video format), selects encoding properties per their media needs and starts conversion process to XYZ Co.ize IT media.

    a. If User requires a custom video “skin”:

        i. User uploads logo in compatible GIF graphic format.

        ii. User inserts URL to appropriate click-through page on either their site or XYZ site.

        iii. User enters small text message (up to 4 lines of 32 characters.)

5. Converted media is replayed to user and is selected to be saved or discarded.

6. If media is selected to be saved, the file is uploaded to XYZ Co. via element 29 (XYZ Receives, Catalogs and Hosts Media Content) and is stored under element 68 (Manage Media Content).

7. User attaches Meta-data to media via element 68 (Manage Media Content).

8. Thumbnail of first frame of VIT image is captured and inserted as part of the Content Management data for that VIT.

9. User can return to element 28 (Create and Upload) or element 68 ((Manage Media Content) to create, upload, attach additional meta-data or deactive media.

(If User Chooses XYZ Co. Zoom)

10. User enters element 62 (My XYZ Home Page) and selects element 28 (Create and Upload Media Content).

11. User is directed to element 26 (Downloads required software.) and/or 27 (XYZ software download and maintenance)

12. If needed, User is directed to Use Case 4 steps 4 through 7.

13. User follows on-screen directions to select appropriate file type (BMP, JPG or other compatible digital image format), selects encoding properties per their media needs and starts conversion process to XYZ Co. Zoom media.

    a. User may select to encode and upload a single image. (or)

    b. User may select multiple images for encoding and uploading.

14. Converted media is displayed to user and is selected to be saved or discarded.

15. If media is selected to be saved, the file is uploaded to XYZ Co. via element 29 (XYZ Receives, Catalogs and Hosts Media Content) and is stored under element 68 (Manage Media Content).

    a. XYZ will host and store the VZ image (and)

    b. XYZ will host and store a JPEG thumbnail for each stored VZ image.

16. User attaches Meta-data to media via element 68 (Manage Media Content).

17. User can return to element 28 (Create, Upload and Manage Media Content) and element 68 (Manage Media Content) to create, upload, attach additional meta-data or deactive media.

Use Case 6: Manage Media Content: Search – View – Update – Disable – Archive - Delete

Summary of Storyboard Elements Involved

62, 68, 29

Use Case Steps (In User-eze)

1) User logs on through element 62, “My XYZ Home Page”.

2) User Navigates to element 68, (Manage Media Content). User then has option to do the following:

    i) Search: The user will be able to search for content files that match criteria that a user has specified – this refers to the content attributes entered in the content management area. The exact criteria has not yet been specified, but will more than likely be all of the attributes that can be associated with content files. The user will have flexibility when searching and sorting the list.

    ii) View: At the Content Management screen, the user will see a list of the content that is currently stored for this account. Since an account could potentially have thousands of images, the entire list will not be displayed. Only the first 20 or so will be displayed, followed by “Next” and “Prev” buttons. If the image is available, the user can view a thumbnail of the image.

    iii) Sort: The user will be able to sort the list by columns that will allow sorting, providing the user maximum flexibility for viewing the list.

    iv) Update: Except for certain attributes (such as creation date), all attributes of a file in the content library will be available for modification. All users will possess this capability. The user will also be able to change the image itself while maintain the same attributes.

    v) Disable :Any content files that are deemed unnecessary by the user can be marked for disabled status to be moved to a disabled status. These media CANNOT be selected by other account users for campaigns or web site design.

    vi) Delete: Any content files that are deemed unnecessary by the user can be deleted at any time. This information is moved to an archive file on the XYZ system, rather than being completely deleted.

3) Changes are cataloged by element 29, “Receive, Catalog, Host Media Content.”

Supporting Technical Detail

None.

Use Case 7: Download Video for a non-XYZ Campaign Distribution: User Selects Video File – User Gets Charged

Summary of Storyboard Elements Involved

62, 68, 29

Use Case Steps (In User-eze)

1) User logs on through element 62, “My XYZ Home Page”.
2) User Navigates to element 68, “Manage Media Content”. The user selects the option to download a video.
3) The user will enter a timeframe in which the video can be viewed.
4) The MSP Server will compile a video file that can only be viewed for the specified timeframe.
5) Once the file has been created, it will be available for download as a hyperlink on a confirmation page.
6) The user then downloads the file.
    a) User is warned that charges will accrue if they proceed.
7) An entry will be made into the user’s order history.
8) User’s account is charged.

Use Case 8: Download Video for evaluation by the User (Video Creator/Distributor): User Selects Video File – User downloads limited time file

Summary of Storyboard Elements Involved

62, 68, 29

Use Case Steps (In User-eze)

1) User logs on through element 62, “My XYZ Home Page”.

2) User Navigates to element 68, (Manage Media Content).

3) The user selects the option to download an evaluation video.

4) The timeframe is set automatically at 24 hours.
5) XYZ will compile a video file that can only be viewed for the specified timeframe.
6) Once the file has been created, it will be available for download as a hyperlink on a confirmation page.
7) The user then downloads the file.

Use Case 9: User Creates Distribution List: Create List – Transmit to XYZ – View List in Distribution List Screen

Summary of Storyboard Elements Involved

62, 30, 31

Use Case Steps (In User-eze)

1) User logs on through element 62, “My XYZ Home Page”.

2) User Navigates to element 30, “Customer Mail List Screen”.

3) The user will elect to create a Distribution List from the Campaign screen.
4) The user will enter the name of the List and any other attributes that are needed.

5) If user chooses to manually create distribution list:

   a) For each name that is needed on the list, the user will type in the information.
   b) Each click of the submit button will add an entry to the list.
   c) The user can include the contents of an existing list at any time by either including the contents of an existing list, or using the Upload Distribution List (see below) feature.

6) IF USER CHOOSES TO UPLOAD DISTRIBUTION LIST

   a) At any time, the user can elect to upload the contents of a CSV (comma seperated value) file for use as a distribution list.
      i) XYZ customer service will supply format specifications.
   b) The user may download a template with the proper format for campaign list.
   c) Once selected, the user will be presented with a dialog box that will allow him/her to locate the file on the client machine. This will have the attribute information (similar to MS Office attibutes) about this list for the uploader to fill out.
   d) The user will submit the file. If the file does not upload correctly, the user is notified about how to correctly upload the file.
   e) XYZ will receive the file and attributes associate with that file.

Supporting Technical Detail

- The e2 server will parse the file, and retrieve each address to add to the distribution list.
- If successful, the user will receive an “Successful upload” screen. If failure, an error screen will be presented, with a statement similar to “Is this the entire list or the names that did not transfer?”. This will be handled by a private label of e2 functionality.
- If the user uploaded this list as an addition to a manual entry list, then it will not be saved as a new list. If this file was uploaded as a new list, then it will be saved as a standalone list.

Use Case 10: Manage Distribution List: Search – View – Update – Disable – Archive - Delete

Summary of Storyboard Elements Involved

62, 30, 31

Use Case Steps (In User-eze)

1) User logs on through element 62, “My XYZ Home Page”.

2) User Navigates to element 30, “Customer Mail List”. User then has option to do the following:

   i) Search: The user will be able to search for customers that match criteria that a user has specified

   ii) View: At the Customer Management screen, the user will see a list of the customers that are currently stored for this account. Since an account could potentially have thousands of customers, the entire list will not be displayed. Only the first 20 or so will be displayed, followed by “Next” and “Prev” buttons.

   iii) Sort: The user will be able to sort the list by columns that will allow sorting, providing the user maximum flexibility for viewing the list.

   iv) Update: Except for certain attributes, all attributes of a customer will be available for modification.

   v) Delete: Any customers that are deemed unnecessary by the user can be deleted at any time. This information is moved to an archive file on the XYZ system, rather than being completely deleted.

   vi) Download: This list can also simply be viewed or available for download to archive on the user’s computer.

Use Case 11 Demo: Browse Demo Environment – View Demo

Summary of Storyboard Elements Involved

2,3,4,5,7,8,26,67

Use Case Steps (In User-eze)

1. User lands on element 2 (XYZ Services Demo Page.)

2. User browses the demo environment (static demo, pre-fab demo or build-your-own demo).

3. If User selects static demo, user sees standard HTML web pages that do not require XYZ software.

4. If User selects pre-fab demo, user sees standard HTML pages that include services that require XYZ software to be downloaded to the client PC. User must enter a minimal set of registration data, including email address.

    a. User will be added to the XYZ visitor list database.

    b. User will be sent “welcome” email.

    c. User will be asked if they would like additional emails on XYZ services.

5. If User selects build-your-own demo, user is directed to element 7 (Sign-Up / Activate Demo Account).

6. User runs Use Cases 4,5,6 and 8.

Use Case 12: Setup Direct Account: User Sign-Up - Activate Live Account

Summary of Storyboard Elements Involved

7,13

Use Case Steps (In User-eze)

User initiates request for Account Setup. Enters appropriate data into registration form. Enters the financial details and submits the request for account setup.

or

1) User clicks Setup Account link from XYZ website. Element 7 (if in demo environment) or 13 (if in live environment.) User enters email address, first name, last name, company name, company type, logon name, password.
    a. If User is setting up a demo account, skip to step 5.
    b. If User is activating a live account, go to step 2.
2) User fills in all the required information of Account Setup Form. If User has a previous demo account, the account is converted and the additional required fields are requested from User.
3) User is directed to element 20 (SLA Contract established at XYZ) and selects Services needed from services list.
4) Enters Financial Information, choosing to use a credit card or request opening of an account. Information is entered on a secure connection (SSL). If the entered information is not correct, the User is notified and told how to correctly enter this information.
5) User clicks to submit account setup request.

6) Confirmation is sent to User via email and element 62 (My XYZ Home Page).

   a) If demo account, User is finished

   b) If live account, go to step 7.

7) If a Direct Customer, a copy of the Confirmation Email is sent to designated XYZ CSR.

8) If a Reseller's Customer, a copy of the Confirmation Email is sent to the designated Reseller CSR.

9) Account information is passed to element 22 (XYZ Billing System) and element 61 (View Account Information $) is updated to reflect current billing status.

10) Quality Control: A work flow process is established such that a XYZ CSR will confirm that all new accounts are set-up properly (during initial production deployment of eBusiness 1.0. This QC process may become partially or fully automated at a later date.)

Use Case 13: Setup XYZ Services Reseller Account: User Sign-Up - Activate Live Account

Summary of Storyboard Elements Involved

12, 13, 20, 22, 61

Use Case Steps (In User-eze)

User initiates request for Account Setup. Enters appropriate data into registration form. Enters the financial details and submits the request for account setup.

1. XYZ Administrator selects from the current account list or adds a new account and designates that specific account as a Reseller via element 12 (XYZ Sales Closes Sale…)
2. Reseller User clicks specified Account and continues through Setup Account from XYZ website. Element 13 (Sign-up / activate live account)
3. Reseller runs Use Case 12, steps 3 through 7.

4. Reseller may jump off on Branding Use Case (6XXX)

5. Quality Control: A work flow process is established such that a XYZ CSR will confirm that all new accounts are set-up properly (during initial production deployment of eBusiness 1.0. This QC process may become partially or fully automated at a later date.)

Use Case 14: Setup Reseller's Customer Account: User Sign-Up - Activate Live Account

Summary of Storyboard Elements Involved

7, 23, 24, 25, 61

Use Case Steps (In User-eze)

1. User clicks Setup Account link from Reseller's website. Element 7 (if in demo environment) or 23 (if in live environment.)
2. User runs Use Case 12 steps 2 through 7.

3. A copy of the Confirmation Email is sent to the designated Reseller CSR.

4.

Use Case 15: Account Management:

Summary of Storyboard Elements Involved

45, 46, 35, 61, 25

Use Case Steps (In User-eze)

Account management is involved in creating, updating, and deleting various accounts like Direct Customer account, reseller account and reseller customer account. Account administrator is responsible for enabling media services to account users and monitoring media services usage by user.

1. User logs on through element 62, “My XYZ Home Page”.

2. User has the option to choose from the following Account Management options:

    a. User navigates to element 35, (Usage and Statistics Reporting). User then runs Use Case 16 Using Usage and Statistics Reports

    b. User navigates to element 45 (Reseller Defines Resale SLA prices). User then runs Use Case 17: Define Resale Prices.

    c. User navigates to element 46 (Reseller Transfers and Manages Customer Account Data). User then runs Use Case 18: Manage Customer Account Data.

    d. User navigates to element 63 (User Account C/R/U/D). User then runs Use Case 19: Manage User Account

    e. User navigates to element 61 (View Account Information $). User then runs Use Case 20: View Account Information.

Use Case 16 Using Usage and Statistics Reports

Summary of Storyboard Elements Involved

35, 38

Use Case Steps (In User-eze)

1. User logs on through element 62, “My XYZ Home Page”.

2. User navigates to element 35, (Usage and Statistics Reporting). User then has the option to:

    a. View statistics of Zoom Clicks on any selected XYZ Co. Zoom image(s).

    b. View statistics of Zoom Clicks on all images.

    c. View statistics of click-through on any selected XYZ Co.izeIT video(s).

    d. View statistics of click-through on all XYZ Co.izeIt videos.

    e. View statistics of Email Campaign click-through on any selected Email(s).

    f. View statistics of Email Campaign click-through on all Emails.

    g. Sort, view, print, email, and/or export / download report to local client PC.

    h. Statistical reporting package may include additional details such as, total emails sent, bad email addresses, open emails, track email forwards or additional sign-ups. This information will be gathered and transferred to XYZ by a third party email marketing specialist.

Use Case 17: Define Resale Prices

Summary of Storyboard Elements Involved

45

Use Case Steps (In User-eze)

1. User logs on through element 62, “My XYZ Home Page”.

2. User navigates to element 45, (Define Resell SLA Pricing). User then has the option to:

    a. Select new XYZ service or view already selected XYZ service elements for resale.

    b. Create new or modify existing service packages for resale.

    c. XYZ will validate that the new or modified service packages can be provided.

    d. Insert pricing for new service packages or modify pricing on existing service packages.

    e. Establish pricing rule(s) for new and existing customers.

3. Change Confirmation email sent to designated Account Administrator.

Supporting Technical Detail

Pricing rules will need further definition.

Use Case 18: Manage Customer Account Data.

Summary of Storyboard Elements Involved

46

Use Case Steps (In User-eze)

1. User logs on through element 62, “My XYZ Home Page”.

2. User navigates to element 46, (Manage Customer Account Data). User then has the option to:

    a. View:

        i. User has option to sort list by designated fields.

        ii. User has option to search list by designated fields.

        iii. User has option to sort, view, print, email, and/or export / download Customer Account information to local client PC.

    b. Create:

        i. User has option to transfer bulk list or account names. XYZ Customer Service will supply format specifications for file transfer.

        ii. User has option to enter account names manually via input form.

    c. Update:

        i. User has option to transfer bulk list or account names. XYZ Customer Service will supply format specifications for file transfer.

        ii. User has option to update each account manually via input form.

    d. Delete:

        i. User has option to transfer bulk list of account names to be deleted. XYZ Customer Service will supply format specifications for file transfer.

        ii. User has option to delete each account manually via input form.

        iii. User has option to delete all accounts.

Use Case 19: Manage User Account

Summary of Storyboard Elements Involved

Use Case Steps (In User-eze)

1) User logs on through element 62, “My XYZ Home Page”.

2) User navigates to element 63, (Manage User Account Data). User then has the option to:

   e. View:

      i. Account Administrator has option to sort list by designated fields.

      ii. Account Administrator has option to search list by designated fields.

      iii. Account Administrator has option to sort, view, print, email and/or export / download User Account information to local client PC.

   f. Create:

      i. Account Administrator has option to transfer bulk list of User information. XYZ Customer Service will supply format specifications for file transfer.

      ii. Account Administrator has option to enter User information manually via input form.

      iii. Account Administrator has option to grant or revoke Administrator rights to any User.

   g. Update:

      i. Account Administrator has option to transfer bulk list of User information. XYZ Customer Service will supply format specifications for file transfer.

      ii. Account Administrator has option to update each User manually via input form.

   h. Delete:

i. Account Administrator has option to transfer bulk list of User information to be deleted. XYZ Customer Service will supply format specifications for file transfer.

ii. Account Administrator has option to delete each User manually via input form.

iii. Account Administrator has option to delete all Users.

Use Case 20: View Account Information

Summary of Storyboard Elements Involved

62, 61, 25, 22

Use Case Steps (In User-eze)

1. User logs on through element 62, “My XYZ Home Page”.

2. User navigates to element 61 (Reseller… views account information $.)

3. User has the option to:

    a. View current quotes (XYZ’s price quotes for non-standard offerings.)

    b. View year-to-date or month-to-date account summary.

    c. Renew SLA.

Use Case 21: Reseller Chooses Branding - XYZ Publishes / Activates Content

Summary of Storyboard Elements Involved

12, 14, 15, 16, 17, 18, 19

TBD Pending Resolution of Outstanding Issues

Use Case Steps (In User-eze)

1) Reseller or Direct Customer decides to Brand XYZ Services.

2) Reseller or Direct Customer contacts XYZ Customer Service and is directed to Branding URL.

3) Reseller or Direct Customer clicks on Branding URL and downloads collateral materials to change and post on their site. Collaterals my include White Papers or documentation to assist Reseller's Client in understanding / utilizing XYZ services.

4) Reseller or Direct Customer selects "Branding Wizard". Wizard instructs Reseller or Direct Customer to enter the following:

    a) Company and name and address(es)

    b) Logos of different sizes or resolutions

    c) Tech support contact email addresses and phone numbers

    d) Customer support contact email addresses and phone numbers

    e) URLs to return to specific locations within Reseller or Direct Customer's home web site.

5) Reseller or Direct Customer selects "OK", and XYZ returns a sample Web Page using their supplied information.

6) Reseller or Direct Customer:

   a) Accepts sample web page (or)

   b) Rejects sample web page and returns to Branding Wizard to make changes (or)

   c) Rejects sample web site and calls XYZ customer service for further design assistance.

   d) Reseller or Direct Customer continues with step 6 until branding is acceptable.

7) Either Reseller or Direct Customer or XYZ completes final web site Quality Assurance review.

8) Branding goes live on Reseller or Direct Customer web site.

9) Confirmation email is sent to designated XYZ CSR and designated Reseller or Direct Customer's Account Administrator

10)

Pricing Illustrations:

Reseller wants purchase XYZ Co. Zoom service

1) Retail price to convert host and serve one XYZ Co. Zoom image of approximately 1.5 MB for one month is $1.25/unit.

When the Reseller accumulates 1,000 images for their combined customers, the price for all units is $0.85/unit (or approximately 35% discount.)

XYZ sales and marketing may override this pricing plan by negotiating a pre-defined bundling or monthly discount from retail.

Reseller wants purchase XYZ Co.ize IT service

1) Retail price to convert one XYZ Co.ize IT Video of approximately 1 MB is $2,000.

When the Reseller accumulates 3 VITs for their combined customers, the price for all units is $1800/unit (or approximately 10% discount.)

XYZ sales and marketing may override this pricing plan by negotiating a pre-defined bundling or monthly discount from retail.

Reseller wants purchase Email Campaign service

1) Retail price to deliver 1,000 emails without attachments $100. (Hosting and Serving is provided by Reseller or Direct Customer.)

When the Reseller accumulates 10,000 sent emails with one month, for their combined customers, the price for all units is $80/1000 emails (or approximately 20% discount.)

XYZ sales and marketing may override this pricing plan by negotiating a pre-defined bundling or monthly discount from retail.

Attachments: Each 1 MB attachment costs an additional $0.20.

VIT Delivery: XYZ Hosting and Serving VIT messages costs an additional $0.05 per email sent.

If Reseller Desires Professional Services:

Time and materials rates will be charged at appropriate rate for skill used:

Creative (HTML) $300

Simple Technical Services $200

Posting: $50 per image

Volume Discounts will be extended to Professional Services.

Use Case 22: Sales and Service

Summary of Storyboard Elements Involved

TBD Pending Resolution of Outstanding Issues

Use Case Steps (In User-eze)

Sales and service involve selling XYZ Co. media services and products to customers, process customer requests for media services and enabling customers to use XYZ Co. media services.

Use cases:

Create RFQ

Customer selects the products and quantity. Enters the required financial information. Submits request for quote.

- Customer visits the media service page.
- Chooses the Services from the provided list
- Selects quantity of usage Service Level
- Selects the pricing or pricing is calculated from service level agreement
- Fills out required financial information or collect the financial info from the original account creation.
- Submit the request for quote
- The account is created and authorized with a predefined service level (demo +) until credit is verified.

Process RFQ

XYZ Internal person looks into RFQ queue. Views RFQ. Verifies financial data. If every thing is fine complete the process otherwise contacts the customer for required information

- Access RFQ queue
- XYZ Internal person views the RFQ Queue
- Selects the RFQ
- Checks all the required information and agreements
- Verifies Financial Information. If financials are incomplete the Demo + account can be extended with authorization from XYZ Co. personnel.

There is a process for escalating an account during the evaluation period.

If account is rejected, the account goes to the next level of the rejection queue with the reason for rejection. The customer is notified of the delay.

The XYZ Internal person can also escalate an account because XYZ would like to offer a "better deal" to a large customer. This is then handed to sales personnel (CSR). Sales can manually enter information into the quote.

Any basic information can be over ridden in the computer/accounting/payment system.

- If accepted Generates the Quote.
    - Quote moves to the Open Quote list.

    - The customer must be notified of the acceptance of the quote and must accept all terms and conditions of the quote.

Quote Acceptance

Customer receives quote or acceptance of their credit card if the credit card information was entered in advance.

If the credit card was entered and accepted the service fully activated.

If the customer does not enter a credit card when requesting a quote, the customer now enters a Credit card or PO number.

At this point, it moves to processing payment

Process Payment

XYZ Co. employee or sales person processes customer's payment. Payment can be done in two ways one Credit Card other Purchase Order.

- Customer submits payment.
- XYZ Co. employee checks the payment type.
- The XYZ Co. employee will verify the information required
- Verifies the Credit history by reviewing credit history or calling a financial institute.
- Enable the customer to use media services.

Use Case 23: BackOffice

Summary of Storyboard Elements Involved

TBD Pending Resolution of Outstanding Issues

Use Case Steps (In User-eze)

BILL DIRECT CUSTOMER

A service usage bill is created and sent to a direct customer.

1. A XYZ Co. employee starts the process of creating a bill for a direct customer.
2. The system gathers account information from the commerce database.
3. The system gathers service usage statistics from the media server database.
4. The system processes the account and service usage information and produces a billing statement.
5. A XYZ Co. employee posts the bill to the direct customer.

VIEW BILLING REPORT

A XYZ Co. employee or a customer account administrator views a service usage billing report.

1. A XYZ Co. employee or a customer account administrator enters a time period and requests a billing report.

2. The system gathers account information from the commerce database.

3. The system gathers service usage statistics from the media server database.

4. The system processes the account and service usage information and produces a billing statement that is displayed to the user.

Bill Reseller

A service usage bill is created and sent to a reseller.

1. A XYZ Co. employee starts the process of creating a bill for a reseller.

2. The system gathers account information from the commerce database.

3. The system gathers service usage statistics from the media server database.

4. The system processes the account and service usage information and produces a billing statement.

5. A XYZ Co. employee post the bill to the reseller.

Bill Reseller Customer

A service usage bill is created and sent to the customer of a reseller.

1. A XYZ Co. employee starts the process of creating a bill for the customer of the reseller.

2. The system gathers account information from the commerce database.

3. The system gathers service usage statistics from the media server database.

4. The system processes the account and service usage information and produces a billing statement.

    a. (If no Private Labeling) Bill under XYZ name, pay commission to Reseller

    b. (If Private Labeling) Bill under Reseller's name, Reseller collects money and pays XYZ

5. A XYZ Co. employee posts the bill to the customer of the reseller.

DEBIT CREDIT CARD

A consumer's credit card is debited a specific amount for service usage.

1. The system receives a request to debit a specific amount from a consumer's credit card.

2. The system verifies all the consumer information (name, address, credit card number, etc.) provided with the request.

3. The system contacts the consumer's credit card account to allocate the required amount.

4. The system receives confirmation that the services have been provided to the consumer.

5. The system contacts the consumer's credit card account to transfer the debited amount to XYZ Co.'s merchant account.

PROCESS CREDIT CHECK

A Reseller or Direct Customer's credit report is requested and analyzed to validate the credit of the consumer.

1. A Reseller or Direct Customer uses the XYZ Co. web-site to send a request to open an account with XYZ Co..

2. A XYZ Co. employee will receive the request via email or by logging into the system.

3. The XYZ Co. employee will gather all of the Reseller or Direct Customer's information and request a credit report from a credit report company.

4. The XYZ Co. employee will analyze the credit report to approve or reject the Reseller or Direct Customer's request to open an account.

PROCESS PURCHASE ORDER

A XYZ Co. employee processed a Purchase Order submitted by a Reseller or Direct Customer as a method of payment for services provided by XYZ Co..

1. A Reseller or Direct Customer submits a purchase order as a method of payment.

2. A XYZ Co. employee will receive the request via email or by logging into the system.

3. The XYZ Co. employee will verify that all the information required is in the request.

4. The XYZ Co. employee will verify the purchase order by calling a financial representative of the Reseller or Direct Customer's company.

Attachment 1: Issues

ID #	Source/Date Assigned To / Date	Priority	Category	Sub-Category	Description
	Jennifer and Richard		Sales Process	Credit	How planning to do credit checks?
	Jennifer and Richard		Sales Process	Credit	How will we use credit cards?
	Jennifer and Richard		Sales Process	Order Sequence	What and How do Resellers Order? Option1: Reseller buys in bulk and sells in packages: Sample order: Reseller buys 100 mb storage/mo, 600 kbps transfer rate, or Reseller is allowed 100 gigabits of transfer per month THEN Reseller sells 10 XYZ Co. Zoom image storages with 200 hits per month and one email campaign of 30,000 emails or less. Option 2: Reseller buys in bulk and sells in bulk: Sample order: Reseller buys 100 mb storage/mo, 600 kb transfer rate, or Reseller is allowed 100 gigabits of transfer per month, THEN Reseller sells 2 mb storage at 50 kbps or 2 gigabits of transfer per month. Option 3: Reseller buys packages and sells in packages:

ID #	Source/Date Assigned To / Date	Priority	Category	Sub-Category	Description
					Sample order: Reseller buys 100 packages of 10 VZ images and 30,000 emails with video, then resells individually.
	Jennifer and Richard		Sales Process	Billing Model	Option 1: (Cell Phone Model) Bill at fixed rate per unit per month, bill overage at fixed rate per month. Option 2: (Wholesale Parts Model) Negotiated contract rate per unit, regardless of volume, with scheduled reviews of usage
	Jennifer and Richard		Sales Process	Billing Reseller's Client	Will we bill the Reseller in bulk and provide usage reports to Reseller so Reseller can bill it's clients? Will we bill the Reseller's client's for the Reseller? (if so, will we Private Label the billing?) Since Reseller's will be free to set their own resale price, how will XYZ accommodate all the unique pricing structures when XYZ bills Reseller's Client for Reseller? If XYZ allows reseller to set up "free-form" packages as desired, how will XYZ accommodate all the unique pricing and packaging structures when XYZ bills Reseller's Client for Reseller?

Attachment 2: User Interface Requirements:

- Users always have option of “un-do”
- Media retention. Always maintain:
  - An archived version
  - The current (or active) version
  - Last deleted
- Standard internet-type forms, layouts, approval, error handling, etc.
- Always require confirmation on information entered by User.
- Any major account changes will be confirmed via email to the designated XYZ and Direct Customer or Reseller’s account administrator.
- Customer or Reseller’s account administrator will have the ability to grant/revoke the right to send a “live” email campaign or create live media. This is to prevent the unauthorized sending of communications based on XYZ services.
- Any uploaded media is automatically designated “disabled” until an authorized user designates the media as “live”. This is to prevent unintended charges.
- Any time a User initiates an action that will result in charges, the User is notified and asked to click their approval.

Virus Scanner

The Virus Scanner is software that will be used to protect the XYZ Co. systems, and end client systems against any files that have been infected with viruses.

Attachment 3: Miscellaneous Items

1) Business Rule: For a Reseller or Direct Customer to utilize XYZ services (beyond demo mode), an SLA must be paired with a live account. See Element 13 (Reseller or Direct Customer Signs Up / Activates Live Account) and Element 20 (SLA (Electronic) Established at XYZ.)

2) Business Rule: If Reseller does not define reseller SLA pricing, (element 45, Reseller defines Resale/Retail SLAs, Prices), then Reseller accounts do not receive the option to select SLA contracts, element 24 (SLA Contract Established at Reseller or Direct Customer.)

3)

Attachment 4: Desired Enhancements for Releases Beyond eBusiness 1.0.

Workflow Process for Reseller CSRs: It would be desirable to assist Reseller CSRs with work-flow messages / assignments such as “confirm new account setup completed correctly.”