

# Safeco Marketing Toolkit Catalog Use Cases (version 2)

## About Use Cases

Use Cases are used at the beginning of the design process to quickly brainstorm workflows and identify potential issues and difficulties. Written from a user's perspective, Use Cases do not describe technical or design details. Instead they identify possible user interactions, both desired and unexpected, define system reactions, and organize all into simple steps. Use Cases are then used to inform both the information and interaction design process and the back-end development.

## Project Use Cases

- First Time Visitor

- Manage Account

  - Edit Shipping Information
  - Edit Billing Information
  - View Order History
  - Edit Favorites
  - Edit Custom Information

- Document Customization

  - Customize
  - Preview
  - E-mail
  - Download
  - Print

- Shopping Cart

- Search

- Adding to Favorites

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## First Time Visitor

### Main Scenario

1. User selects catalog link
2. System prompts user to login.
3. User successfully logs in
4. System present user with home page.
5. User can select site orientation or start exploring site

### Exceptions

- 1a User enters site through page other than home page
  1. User navigates site using navigation
  2. User can access site orientation through utility navigation

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## Manage Account: Edit Shipping Information

### Main Scenario

1. User accesses account
2. System shows all saved shipping addresses
3. User may edit, remove or add new address
4. User selects address and fills in information
5. System confirms that changes are made

### Exceptions

- 2a There is only one address
1. System allows user to edit address
- 3a User wants to add address
1. User may select to add new address
- 4a User omits required field
1. System alerts user that information is missing
  2. System indicates which fields are missing<sup>3</sup>
  3. User enters information
- 4b User enter information in invalid format
1. System alerts user that there are errors
  2. System indicates error location and provides guidance for correct entry
  3. User enters information
- 5a System has problem saving changes
1. System prompts user to save again.

## Manage Account: Edit Billing Information

### Main Scenario

1. User accesses account
2. User selects billing address
3. User reviews and fills in or changes information
4. User saves changes
5. System confirms that changes are made

### Exceptions

- 3a User omits required field
1. System alerts user that information is missing
  2. System indicates which fields are missing
  3. User enters information
- 3b User enter information in invalid format
1. System alerts user that there are errors
  2. System indicates error location and provides guidance for correct entry
  3. User enters information
- 4a System has problem saving changes
1. System prompts user to save again

## Manage Account: View Order History

### Main Scenario

1. User accesses account
2. User selects order history
3. User may select previously ordered item to view
4. System presents item detail
5. User adds item to [shopping cart](#) and checks out.

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## Exceptions

- 3a User has no previous orders
  - 1. System informs user that there are no orders
  - 2. System prompts user to browse for items
- 4a Item is customizable
  - 1. User [customizes document](#)
  - 2. System indicates error location and provides guidance for correct entry
  - 3. User enters information

## Manage Account: Edit Favorites

### Main Scenario

- 1. User accesses account
- 2. User selects favorites
- 3. System shows list of all items in favorites
- 4. User can select or remove each item
- 5. User removes item and system presents updated list
- 6. User selects item
- 7. System presents item detail
- 8. User adds item to [shopping cart](#) and checks out.

### Exceptions

- 3a User has no favorites
  - 1. System informs user that there are no orders
  - 2. System prompts user to browse for items and tells user how to add item to favorite

## Manage Account: Edit Custom Information

### Main Scenario

- 1. User accesses account
- 2. User selects custom information
- 3. User reviews and fills in or changes information
- 4. User saves changes
- 5. System confirms that changes are made

### Exceptions

- 3a User omits required field
  - 1. System alerts user that information is missing
  - 2. System indicates which fields are missing
  - 3. User enters information
- 3b User enter information in invalid format
  - 1. System alerts user that there are errors
  - 2. System indicates error location and provides guidance for correct entry
  - 3. User enters information
- 4a System has problem saving changes
  - 1. System prompts user to save again

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## Document Customization: Customize

### Main Scenario

1. User selects customizable item
2. User can either [preview](#) or customize item
3. User selects to customize item
4. System prompts user to fill in custom information stored in account
5. User enters missing information
6. User preview document with customized information and confirms or makes changes
7. System presents options to email, print or download item
8. User [e-mails](#), [prints](#), or [downloads](#) item

### Exceptions

- 6a User sees incorrect information and needs to change
1. System allows user to re-enter custom information
- 6b User has ordered item before
1. System prompts user to edit pre-entered custom information stored in account
- 6c User is new and has not entered custom information
1. User fills in empty form
  2. System stores information in account for later use or editing

## Document Customization: Preview

### Main Scenario

1. User chooses to preview item
2. System shows users item
3. For preview prior to customization, user chooses to customize. User approves customization.

### Exceptions

- 3a User is first time user
1. User fills in empty form
  2. System saves information to account
- 3b User is returning user that needs to make change
1. User changes form information
  2. System saves updated information to account

## Document Customization: E-mail

### Main Scenario

1. User enters name and e-mail address
2. User enters recipient's name, e-mail address and optional message
3. User sends message
4. System confirms message is sent and presents option for further actions
5. System add item to order history

## Document Customization: Download

### Main Scenario

1. User selects download option
2. System provides instructions for download
3. User downloads item
4. System adds item to order history

## Document Customization: Print

### Main Scenario

1. User selects print option

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2. System shows PDF and provides print option
3. System adds item to order history

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## Shopping Cart

### Main Scenario

1. User adds item to cart
2. User reviews items in cart and can remove each item.
3. User selects checkout
4. System asks user to enter billing information. If user has marketing credits, gift certificate number is entered.
5. User reviews pre-populated billing information and makes changes
6. System saves billing information to account
7. User selects address, reviews pre-populated shipping information and makes changes
8. System presents user with final shopping cart
9. User reviews shopping cart
10. User enters payment information.
11. User submits final order
12. System confirms that order has been made.

### Exceptions

- 1a Item is not in stock
  1. System notifies user that item is out of stock
  2. System prompts user to continue shopping
- 2a Cart is empty
  1. System shows empty cart and provides link to shop for items
- 2b User wants to change quantity
  1. User selects item and goes to item detail page
  2. System changes “add to cart” button on item detail page to say “update item”
  3. User enters new quantity or changes custom information
- 5a User is a first time user
  1. User fills in empty form
  2. System saves changes to account
- 5b User is a returning user
  1. User checks form for accuracy
  2. System saves changes to account
- 7a User has selected same shipping address as billing address
  1. System skips shipping information
- 7b User is a first time user
  1. User fills in empty form
  2. System saves changes to account
- 7c User is returning user with only one address
  1. System presents address
  2. User selects address
  3. User fills in pre-populated form
  4. System saves changes to account
- 10a User finds error in shipping or billing information
  1. User edits information
  2. System updates user profile
- 11a User is Safeco Employee
  1. System requests Peoplesoft number
- 11b User is Agent
  1. System requests credit card information

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## Search

### Main Scenario

1. User selects search
2. User enters either keyword or item number
3. Systems present user with search results
4. User selects result

### Exceptions

- 3a Search returns no results
  1. System informs user that no results were found and asks user to search again

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## Adding to Favorites

### Main Scenario

1. User browses to desired item
2. User adds item to favorites

### Exceptions

- 2a Item is already a favorite
  1. System overwrites existing favorite