

Client/Customer/User Specific Use Cases

Use Cases - New User

- New User Setup and "Orientation"
 - Includes first payment
 - Option to setup auto-payment

Use Cases - Active User

- View Current Billing Details
- If a invoice has been created
 - View New Invoice
 - Pay Invoice
- Setup Auto-Pay
- If Auto-Pay is set up
 - View Auto-Pay Details
 - Change Card
 - View details
 - Cancel Auto-Pay
- View Billing History

Use Cases - Inactive / In arrears User

- View Current Billing Details
- View New Invoice(s)
 - Pay Invoice(s)
- View Billing History

Tab/Module Specific Use Cases

Use Cases - New Invoices tab

Customer wants to view and pay a new invoice

- View table of basic invoice details
 - Link to view the invoice
 - Takes you to a page similar to the one we have done for invoices before

Click the link!

- Display details of invoice
- If no card saved, enter billing and card details
 - Option to save the card
- else select a card and process payment

Use Cases - Setup Autopay tab

Customer wants to set up Auto-Pay to conveniently and automatically pay their bill

- Displays autopayment consent brief
- If you have saved a card, able to select that card for autopayments
- Otherwise, fill out form and save the card
- Saves card details and sets autopay flag to true

Use Cases - View Autopay Details tab

Customer wants to view the details of their auto-payment, change the card associated with it or cancel it

- Display current auto-payment details
 - Card
 - Amounts
 - Dates
- Option to change payment method
- Option to cancel auto-payments

Use Cases - View Billing History tab

Customer wants to view past invoices

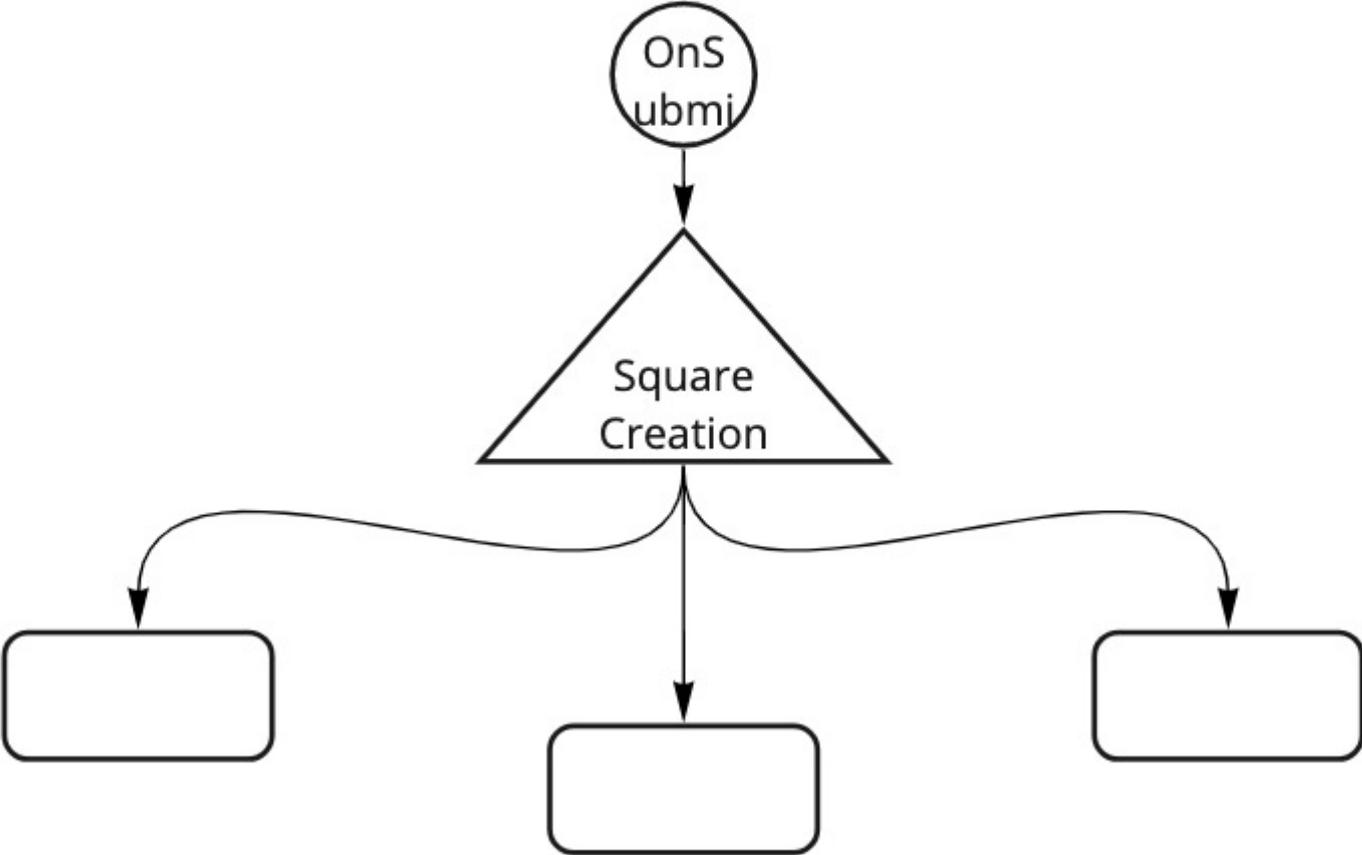
- View a table with basic details of paid invoice
- Links take the user to view the invoice
 - Similar to past invoice viewer
 - Same as New Invoice, just no payment

Use Cases - View Current Billing Details tab

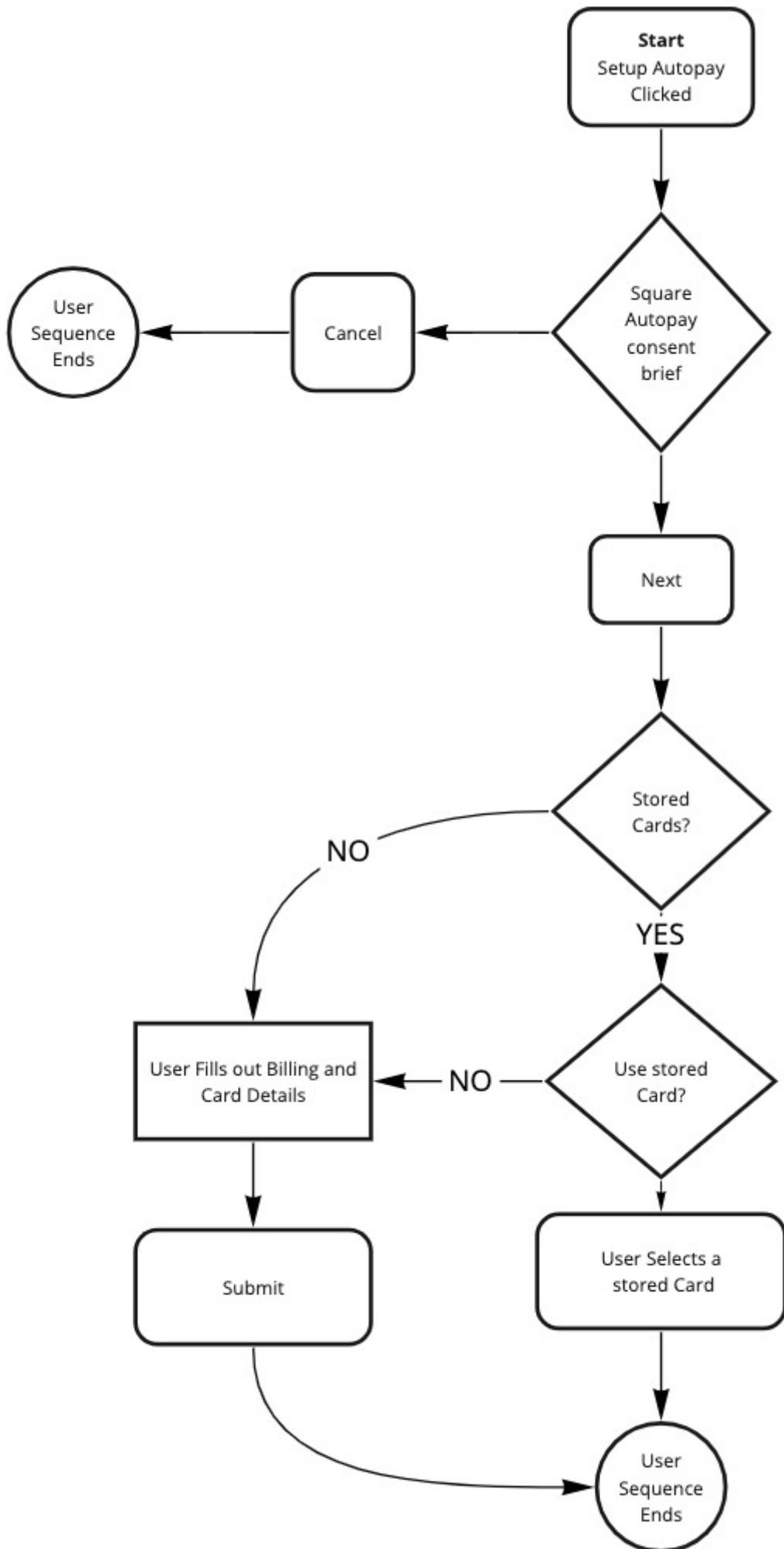
Customer wants to view the details and activity of the current billing cycle

- View relevant data for current billing cycle
 - Dates
 - Amounts (estimated)
- View changes made to account
 - Add-ons

Setup Autopay OnSubmit API Workflow



Setup Autopay Sequence



Use Case: Active Customer wants to setup autopay to make billing automated and easier

Two possible Sequences:

1. Previous Square Payment made but elected not to store card
 - Customer paid first bill
 - We have last_invoice_date and next_invoice date
 - Customer elected not to store payment/card details so we do not have a customer_id or a card_id stored for them
 - Both will need to be created
2. **Previous Square Payment made, card details stored:** Customer_id and at least one card_id exist

1. Elected Not to Store Card on first payment | No card_id, no customer_id

- a. Button reads "Setup Autopay"
- b. Confirmation Screen
 - i. Displays info about autopay, used to confirm consent for Square auto-payments
 - ii. If payment is required today, notify user
- c. Choose Payment method screen
 - i. No Square payments made so no previously used cards displayed
 - ii. Fill out Billing Details form
 - iii. Fill in Card Details form
 - iv. Card is valid, user presses submit
- d. API - App WorkFlow
 - i. On form submit:
 1. Router function, since no sq_customer_id, sent to cq_create_new_customer_and_card
 - ii. First create new Square Customer and store sq_customer_id
 1. Validate form data
 - iii. Now create new card and store sq_card_id
 - iv. Determine if payment is required today or
- e. Process complete, show details to user

Service Charges

Base Plan			
Population: 5 - 10k			\$25
Plan Add-Ons			
Blogs			\$10
Custom Domain	Added 11/10/2020		\$3.25
Intranet			\$10
		Total Charges	\$48.25
Multiple Branches	Removed 11/13/20		-\$3.25
An add-on I cant remember	Removed 11/20/20		-\$2.75
		Total Credits	-\$6.00
			\$42.25

