Profoliofy Use Cases

Use Case UC1: Upgrade to Premium Subscription

Scope: Profoliofy
Level: User goal
Primary Actor: User

Stakeholders and Interests:

- **User:** Wants to access premium features such as advanced templates, enhanced customization tools, removal of platform branding, and the ability to link a custom domain.
- **Platform:** Aims to generate subscription revenue while delivering added value to users through premium services.
- **Designer (indirect):** Gains revenue share if users select their premium templates.

Preconditions:

- The user must have an active free account and be logged in.
- The user must have valid payment information or the means to provide it during the upgrade process.

Postconditions (Success Guarantee):

- The user's account is successfully upgraded to premium.
- Premium features are unlocked, including access to premium templates and customization tools.
- The platform records the subscription details and generates a confirmation receipt for the user.

Main Success Scenario (Basic Flow):

1. **Login:**
   The user logs into their Profoliofy account using their credentials.

2. **Access Upgrade Options:**
   From the dashboard or upgrade prompt, the user selects "Upgrade to Premium."

3. **View Plan Details:**
   The system displays the premium plan features (e.g., premium templates, advanced customization, no branding, custom domain linking) and the subscription fee ($10/month).

4. **Provide Payment Information:**
   The user is prompted to enter payment details (e.g., credit/debit card information). The system provides a secure form for entering this data, with an option to save payment info for future renewals.

5. **Process Payment:**
   The system securely processes the payment through an integrated payment gateway.

6. **Upgrade Account:**
   If the payment succeeds:
   - The system updates the user's account status to premium.
   - The dashboard is refreshed to display premium features.
   - The system displays a confirmation message and sends an email receipt to the user.

Extensions (Alternative Flows):

- **Payment Failure:**
  If payment fails (e.g., invalid card, insufficient funds), the system shows an error message and offers options to retry or use a different payment method.
- **User Cancels:**
  If the user cancels during the process, no charges are made, and the user is returned to the dashboard with their free account intact.
- **Transaction Timeout:**
  If the transaction times out, the system notifies the user and allows them to retry.

Special Requirements:

- The platform should support common payment gateways and methods (e.g., credit/debit cards, possibly PayPal).
- The system must log all subscription transactions with timestamps, user ID, and transaction ID for auditing and support.
- A subscription renewal date should be calculated and stored in the user's profile.

Technology and Data Variations:

- Subscription records are stored in the database with fields such as UserID, SubscriptionStartDate, NextRenewalDate, PaymentStatus.
- Payment processing is handled through third-party APIs integrated into the platform.

Frequency of Occurrence:

- This use case occurs whenever a free user decides to upgrade to premium, either during initial setup, when attempting to use premium features, or in response to upgrade prompts.

Use Case UC2: Link Custom Domain

Scope: Profoliofy
Level: User goal
Primary Actor: User

Stakeholders and Interests:

- **User:** Wants to link their portfolio to a personal or business domain (e.g., myart.com) to improve branding, credibility, and professional presentation.
- **Platform:** Wants to provide enhanced services to premium users, generate domain add-on revenue, and ensure seamless domain integration.
- **Visitors:** Access the user's portfolio via a custom, memorable domain name.

Preconditions:

- The user must have an active premium Profoliofy subscription (custom domains are only available to premium users).
- The user must own a domain or have the ability to update DNS settings with their domain registrar.

Postconditions (Success Guarantee):

- The portfolio is successfully linked to the custom domain, making it accessible to visitors through that domain.
- The system saves the domain configuration, and the domain status is shown as "Linked" in the user's dashboard.

Main Success Scenario (Basic Flow):

1. **Login:**
   The user logs into Profoliofy using their credentials and accesses their dashboard.

2. **Access Domain Settings:**
   The user clicks on "Domain Settings" or "Link Custom Domain" from their account settings or portfolio settings section.

3. **Enter Domain:**
   The system prompts the user to enter their desired custom domain (e.g., myart.com).

4. **Provide DNS Instructions:**
   The system generates DNS configuration instructions, including required CNAME or A-record values, and displays them to the user with a clear guide (e.g., "Add a CNAME record pointing to profoliofy.com").

5. **User Updates DNS:**
   The user accesses their domain registrar's website and updates DNS records as instructed.

6. **Verify Domain Configuration:**
   The user clicks "Verify Domain" in Profoliofy.
   The system checks DNS records for proper configuration.

7. **Confirmation:**
   If verification succeeds, the system links the domain and updates the user's portfolio URL.
   The system displays a success message and sends a confirmation email.
   The dashboard now shows the domain status as "Linked" with the custom domain displayed.

Extensions (Alternative Flows):

- **Verification Fails:**
  If the DNS is not configured correctly, the system shows an error message with tips and troubleshooting guidance (e.g., "Check that your CNAME record matches the instructions and allow time for DNS propagation").
  The user is allowed to retry verification.
- **Invalid Domain Format:**
  If the entered domain is invalid (e.g., missing TLD or unsupported characters), the system prompts the user to correct it.
- **User Cancels:**
  If the user cancels before verifying, the system discards the domain entry and returns to the dashboard without saving any changes.

Special Requirements:

- The domain linking process must include a DNS verification tool with real-time or near-real-time feedback.
- The instructions provided must support common domain registrars and provide examples for popular services (e.g., GoDaddy, Namecheap, Google Domains).
- The system should allow re-verification if the user needs to make corrections at the registrar level.
- The system must log domain linking attempts with timestamps for support and auditing purposes.

Technology and Data Variations:

- The domain configuration data is stored securely in the platform's domain mapping table (e.g., fields: UserID, DomainName, Status, LastVerified).
- The system uses DNS query tools to check record configuration at the time of verification.

Frequency of Occurrence:

- This use case occurs when premium users want to upgrade their portfolio's branding by linking their own domain, typically during initial setup or after purchasing a new domain.

Use Case UC3: Submit Template as Designer

Scope: Profoliofy
Level: User goal
Primary Actor: Template Designer

Stakeholders and Interests:

- **Designer:** Wants to submit high-quality templates to the platform to earn revenue share, gain recognition, and contribute to the ecosystem.
- **Platform:** Aims to build a rich, diverse template library while maintaining high design and usability standards.
- **User:** Benefits from fresh, creative template options submitted by a variety of designers.

Preconditions:

- The designer must have an approved and authenticated designer account.
- The template files must comply with platform submission standards (format, size, completeness).

Postconditions (Success Guarantee):

- The template is stored in the system and flagged as "Pending Review" by the admin.
- The designer receives a confirmation that the template was successfully submitted and is awaiting approval.

Main Success Scenario (Basic Flow):

1. **Login:**
   The designer logs into Profoliofy using their credentials and accesses the designer dashboard.

2. **Navigate to Template Submission:**
   The designer clicks on the "Submit New Template" option from the dashboard menu.

3. **Enter Template Information:**
   The system displays a form where the designer provides:
   • Template name
   • Description
   • Category (e.g., portfolio type, target profession)
   • Suggested type (free or premium)

4. **Upload Files:**
   The designer uploads the necessary files (e.g., layout files, CSS, images, configuration files).

5. **System Validation:**
   The system performs automatic checks:
   • All required files are present.
   • File formats are supported.
   • Files do not exceed size limits.
   • Metadata fields are complete.

6. **Save and Submit:**
   If validation is successful, the system saves the template and sets its status as "Pending Admin Review."
   The designer sees a confirmation message indicating successful submission.

7. **Admin Notification:**
   (Optional) The system notifies the admin team that a new template is awaiting review.

Extensions (Alternative Flows):

- **Validation Failure:**
  If validation fails (e.g., missing files or unsupported formats), the system displays a detailed error report.
  The designer can correct the issues and retry the submission.
- **Cancel Submission:**
  If the designer cancels the process before submitting, no data is saved, and the designer is returned to the dashboard.
- **Duplicate Template Name:**
  If a template with the same name already exists, the system prompts the designer to provide a unique name.

Special Requirements:

- The submission interface should support drag-and-drop file upload or manual selection.
- The system should auto-save drafts of the submission to avoid data loss.
- Submissions should be timestamped and logged for audit and tracking.
- A preview of the uploaded template (screenshot or thumbnail) should be generated if possible.

Technology and Data Variations:

- The system stores submitted template files in secure storage linked to the designer's account.
- The submission record includes: TemplateID, DesignerID, TemplateName, Type, Category, SubmissionDate, Status (Pending Review).

Frequency of Occurrence:

- This use case occurs as designers create and submit new templates. Frequency depends on the activity level of the designer community and platform campaigns (e.g., seasonal template contests).

Use Case UC4: Upload New Template

Scope: Profoliofy
Level: User goal
Primary Actor: Admin

Stakeholders and Interests:

- **Admin:** Wants to ensure that high-quality templates are added to the platform to enhance the user experience and maintain the platform's design standards.
- **Platform:** Needs to continuously update its template library to attract and retain users while ensuring templates are organized, validated, and secure.
- **User:** Benefits from a wider variety of template choices for building portfolios.

Preconditions:

- The admin must be authenticated and logged into the admin panel with the necessary permissions to upload templates.
- The template files must meet platform standards (e.g., supported file formats, size limits, structure).

Postconditions (Success Guarantee):

- The template is successfully added to the platform's template library.
- The template is categorized (e.g., free/premium, profession type) and made available for selection by users.
- A record of the upload is stored in the system's database for tracking, reporting, and analytics.

Main Success Scenario (Basic Flow):

1. **Login:**
   The admin logs into the Profoliofy admin panel using secure credentials.

2. **Access Template Management:**
   From the admin dashboard, the admin selects "Template Management" → "Upload New Template."

3. **Enter Template Details:**
   The system displays a form where the admin enters template metadata:
   • Template name
   • Description
   • Category (e.g., portfolio type, profession focus)
   • Type (free or premium)
   • Designer attribution (if applicable)

4. **Upload Files:**
   The admin uploads the template files, including layout files, images, stylesheets, and configuration files.

5. **Validation:**
   The system checks that:
   - File formats are supported.
   - Required files (e.g., index layout, CSS) are included.
   - File size limits are not exceeded.
   - Metadata fields are complete.

6. **Save and Activate:**
   If validation passes, the system saves the template files and metadata to the appropriate storage location.
   The template is added to the template gallery, visible to users in the appropriate category (free or premium).

7. **Confirmation:**
   The system displays a success message and logs the upload action.
   A notification is sent to the admin (optional), and the template appears immediately in the library for user selection.

Extensions (Alternative Flows):

- **Validation Failure:**
  If files are missing, improperly formatted, or exceed size limits, the system displays detailed error messages.
  The admin is given the option to correct the submission and retry the upload.
- **Cancel Upload:**
  If the admin cancels the upload mid-process, the system discards all unsaved data and returns to the template management screen.
- **Duplicate Template Name:**
  If a template with the same name already exists, the system prompts the admin to choose a unique name or update the existing template.

Special Requirements:

- The template upload interface should support drag-and-drop and manual file selection.
- File validation should occur both client-side (for quick feedback) and server-side (for security and integrity).
- The system should log the upload time, admin ID, and any designer attribution.
- Uploaded templates should be immediately available to users unless the admin marks them as "draft" or "hidden."

Technology and Data Variations:

- Template files and metadata are stored securely in the system's file storage and template database tables.
- The platform may use cloud storage or local server storage for files.
- The template record includes fields like TemplateID, TemplateName, Type, Category, UploadedByAdminID, UploadDate.

Frequency of Occurrence:

- This use case occurs periodically, typically when new designs are ready to be introduced, or when refreshing the platform's template library for marketing campaigns or seasonal updates.

Use Case UC5: Select Template, Edit, and Publish Portfolio

Scope: Profoliofy
Level: User goal
Primary Actor: User (Student / Freelancer / Creative)

Stakeholders and Interests:

- **User:** Wants to create a personalized and professional online presence using a template that reflects their style and profession.
- **Platform:** Wants to provide a smooth editing and publishing process that encourages users to engage and showcase their work.
- **Designer (indirect):** Gains exposure if their template is selected by users.

Preconditions:

- The user must have an active account (free or premium) and must be logged in.
- The user has not yet published a portfolio or is editing an unpublished draft.

Postconditions (Success Guarantee):

- The user's customized portfolio is live on their assigned subdomain or custom domain.
- The portfolio is accessible to visitors via the web.
- The system saves a copy of the user's customized template for future edits.

Main Success Scenario (Basic Flow):

1. **Login:**
   The user logs into their Profoliofy account using their email and password.

2. **Navigate to Template Selection:**
   From the dashboard, the user selects the option "Create New Portfolio" or "Select Template."

3. **View Template Gallery:**
   The system displays the template gallery, showing both free and premium templates, with filters (e.g., by profession, style, color scheme).
   The user browses and previews different templates.

4. **Select Template:**
   The user clicks on the desired template. If the template is premium and the user is on a free plan, the system prompts an upgrade. Otherwise, the template is loaded into the editor.

5. **Edit Template:**
   The system opens the drag-and-drop or form-based editor.
   The user customizes the template by:
   • Adding personal information (name, bio, skills, education, work experience).
   • Uploading images (profile photo, work samples, etc.).
   • Adjusting colors, fonts, and layout (if allowed by plan).
   • Adding custom sections (e.g., testimonials, certifications).

6. **Preview:**
   The user clicks "Preview" to see how the portfolio will appear to visitors. The system generates a real-time preview.

7. **Publish:**
   Satisfied with the design, the user clicks "Publish."
   The system deploys the portfolio to the assigned subdomain (e.g., username.profoliofy.com) or linked custom domain if configured.
   The system updates the dashboard to reflect that the portfolio is live.

8. **Notification:**
   The system shows a confirmation dialog with the portfolio link, and sends an email confirming the successful publication.

Extensions (Alternative Flows):

- **Template Selection Restricted:**
  If the user selects a premium template without having a premium plan:
    The system prompts for an upgrade before proceeding.
    If the user cancels the upgrade, they are returned to the template gallery.
- **Publish Attempt Fails:**
  If the publish action fails (e.g., due to server error):
    The system displays an error message and allows retrying the publish.
- **User Cancels Editing:**
  If the user exits the editor without publishing:
    The system saves the draft for later continuation.

Special Requirements:

- The template gallery must support responsive design and search/filtering for quick access.
- The editor must be user-friendly, with form fields, file upload controls, and live preview capability.
- The publishing action should trigger background deployment processes that are reliable and quick, with proper error handling.
- Drafts should auto-save periodically to avoid data loss.

Technology and Data Variations:

- The editor uses a combination of form controls, drag-drop areas, and file pickers.
- Publishing triggers a server-side deployment script that maps user content to their domain/subdomain.
- Templates and customizations are stored in the database linked to the UserID and TemplateID.

Frequency of Occurrence:

- This use case occurs frequently as it represents the core user flow for creating and publishing portfolios. Users may perform this action multiple times to update or redesign their portfolios.

Use Case UC6: View Portfolio Analytics

Scope: Profoliofy
Level: User goal
Primary Actor: User (Premium)

Stakeholders and Interests:

- **User:** Wants to track portfolio performance, views, clicks, visitor demographics, and referrers, for insight and improvement.
- **Platform:** Enhances user engagement by offering actionable insights and justifies the premium offering.
- **Visitors:** (Indirect) Benefit from improved portfolios as users iterate based on performance data.

Preconditions:

- The user must be logged in and have an active premium subscription.
- The portfolio must be published and receiving traffic.

Postconditions (Success Guarantee):

- The user successfully views visualized analytics (charts, numbers) for their portfolio traffic.
- The system logs access to analytics for tracking and potential future features (e.g., weekly email reports).

Main Success Scenario (Basic Flow):

1. **Login:**
   The user logs into Profoliofy with valid credentials.
2. **Navigate to Analytics:**
   From the dashboard, the user clicks "Analytics" in the portfolio panel.
3. **Select Portfolio (if multiple):**
   If the user has multiple portfolios, they select the relevant one.
4. **View Analytics Dashboard:**
   The system displays a dashboard with metrics such as:
   - Total visits
   - Unique visitors
   - Click-through rate
   - Top referrers
   - Most viewed sections
   - Geographic heatmap

5. **Apply Filters:**
   The user can filter results by date range or source (e.g., social media, direct, search).
6. **Close Dashboard:**
   The user exits or returns to the main dashboard.

Extensions:

- **No Traffic Data:**
  If no visits are recorded yet, the system shows a friendly message like "No data available yet. Share your portfolio to start tracking."
- **Analytics Unavailable:**
  If the analytics system is down, the user sees a service maintenance message.

Special Requirements:

- Analytics should update daily and offer near real-time trends.
- Charts should be interactive and responsive.
- Option to export analytics (CSV or PDF).

Technology and Data Variations:

- Analytics data stored in an analytics table (UserID, PortfolioID, VisitTimestamp, Referrer, GeoLocation).
- Visualization powered by chart libraries (e.g., Chart.js, Recharts).

Frequency of Occurrence:

- Occurs as users monitor performance periodically, typically after publishing or during promotion.

Use Case UC7: Save Portfolio Draft

Scope: Profoliofy
Level: User goal
Primary Actor: User

Stakeholders and Interests:

- **User:** Wants to save ongoing work without publishing until they are ready.
- **Platform:** Increases engagement and content completion rates.
- **Designer:** (Indirect) Gains usage statistics and visibility once template is used.

Preconditions:

- The user must be logged in and editing a portfolio.

Postconditions (Success Guarantee):

- The draft is saved with a timestamp.
- The user can resume editing later from where they left off.

Main Success Scenario (Basic Flow):

1. **Login and Edit Portfolio:**
   The user logs in and starts editing a new or existing portfolio.
2. **Click Save as Draft:**
   The user clicks "Save Draft" while editing.
3. **Save State:**
   The system saves all current form data, uploaded files, and customization in a draft state.
4. **Confirmation:**
   The system displays a "Draft Saved" message.

Extensions:

- **Auto-Save:**
  The system auto-saves every few minutes to avoid data loss.
- **Save Failure:**
  If a server error occurs, the system alerts the user and retries.

Special Requirements:

- Support for partial drafts (e.g., name and bio only).
- Draft autosave should not overwrite user-published portfolios.

Technology and Data Variations:

- Draft data stored in a separate "Drafts" table or flagged in the portfolios table.
- Associated images/files stored with a "draft" flag in file metadata.

Frequency of Occurrence:

- Frequently used by users who plan their portfolio over multiple sessions.

Use Case UC8: Add Testimonial Section to Portfolio

Scope: Profoliofy
Level: User goal
Primary Actor: User

Stakeholders and Interests:

- **User:** Wants to showcase credibility through client or peer testimonials.
- **Platform:** Enhances customization options to meet user needs.
- **Visitors:** Gain trust through user testimonials.

Preconditions:

- The user must be logged in and editing a portfolio.

Postconditions (Success Guarantee):

- A testimonial section is added and saved to the user's portfolio.

Main Success Scenario (Basic Flow):

1. **Login and Edit Portfolio:**
   The user logs in and opens the portfolio editor.
2. **Add Section:**
   The user clicks "Add Section" and chooses "Testimonials."
3. **Enter Testimonial Details:**
   The system provides fields like:
   - Name
   - Title/Company
   - Testimonial Text
   - Optional Photo
4. **Add More Testimonials:**
   The user can add multiple testimonials or reorder them.
5. **Save or Publish:**
   The section is saved in the portfolio draft or published version.

Extensions:

- **Missing Fields Warning:**
  If a required field is missing (e.g., text), system prompts the user.
- **Image Upload Fails:**
  Shows an error and offers retry or skip option.

Special Requirements:

- Support for styled testimonial layouts (e.g., cards, sliders).
- Optional verification badge (future enhancement).

Technology and Data Variations:

- Testimonials saved in JSON format in user portfolio content.

Frequency of Occurrence:

- Occurs as users enhance portfolios with social proof before publishing.

Use Case UC9: Contact Support

Scope: Profoliofy
Level: User goal
Primary Actor: User (or Designer)

Stakeholders and Interests:

- **User/Designer:** Wants to report issues or seek assistance.
- **Platform:** Aims to deliver responsive support and resolve issues quickly.

Preconditions:

- The user must be logged in to initiate support (optional for general FAQs).

Postconditions (Success Guarantee):

- A support ticket or message is created and acknowledged.
- The user receives a response or resolution from the support team.

Main Success Scenario (Basic Flow):

1. **Login:**
   The user logs in to their account.
2. **Access Support:**
   The user navigates to "Help & Support" and clicks "Contact Support."

3. **Fill Support Form:**
   Fields include:
   - Subject
   - Category (e.g., billing, technical, design submission)
   - Description
   - Optional screenshot/file upload
4. **Submit Request:**
   The user submits the form.
5. **Confirmation:**
   The system displays "Request received" and sends an email confirmation.

Extensions:

- **Guest Support Access:**
  A simplified form is available for logged-out users (only for general queries).
- **Response Delay:**
  If the support team is delayed, the system provides estimated response times.

Special Requirements:

- System should integrate with support management tools (e.g., Zendesk, Freshdesk).
- All support requests are logged with timestamps and UserID.

Technology and Data Variations:

- Support form data stored in support_tickets table (UserID, Subject, Category, Timestamp, Status).

Frequency of Occurrence:

- Occurs when users face technical, billing, or design-related issues or have general inquiries.