

CMPT 475 Assignment 5 Group 12

Business Rules for system

No.	<u>Client & Contract Management Rules</u>
1	A client must have at least one active contract before any order can be placed
2	Client/Agent/Product IDs must be unique identifiers.
3	Contracts must define applicable charge types (warehouse, shipping, service) and the billing method (flat rate, quantity, discount, etc.) for each service.
4	Contracts must have valid start and end dates. Only active contracts can be referenced in transactions
5	A Client must have a valid form of payment and signed contract before they can send products.
6	A Client must send their products to a Wizzard Services Warehouse.
7	A Client's stock must be destroyed promptly upon destruction request.
8	A Contract must define terms for handling returns/damaged goods.
9	A Contract may contain rate tables but must be valid and in the active date range.
	<u>Order Entry System Rules</u>
10	An Agent must call or email a Wizzard Clerk to place an order.
11	Order status must follow this valid flow: New -> In Progress -> On Hold/Cancelled -> Completed -> Released.
12	Charge calculation must follow the method and rate defined in the contract
13	Each order must be contained in one invoice; an invoice cannot span multiple orders.
14	Each product in the order must have at least one applicable charge
15	Each order must be associated with a specific client and agent.
16	An Agent must have a valid name, contact information, delivery address, and product list before placing an order.
17	An Agent's order will be put on hold if all items are not in stock.
18	An Agent's Order must include the Agent ID, Product Code, Quantity, and

	Destination.
19	An Agent will not be able to order if their accounts status is suspended.
20	An Agent's order will be cancelled promptly upon request if it has not yet been picked up by the shipping company.
21	Once an Agent's order is processed by fulfillment, the shipping company will be notified immediately that it is ready for pick up.
22	Each product in the order must have at least one applicable charge (warehouse, shipping, or service)
23	An Agent record must include legal or business name, billing address, and contact information.
24	An Agent can only be modified only by authorized personnel with edit privileges.
	<u>Invoice Management Business Rules</u>
25	An invoice must be generated for all completed Agent's Order at the end of the month only after all related charges are calculated.
26	When an error occurs generating invoices the errors will be corrected and then those invoices will be generated again promptly.
27	The invoice language must be selected based on the Client's preference (English, French, or Spanish).
28	An invoice must be sent to the Accounts Receivable Department after it is finalized.
29	An Order must be put on hold or cancelled when inventory is insufficient to fulfill the order.
30	Charges from delivery service providers must be imported before the monthly invoice is calculated.
31	Warehousing charges will be added to the invoice at the end of month.
32	Fulfillment charges must be imported before the invoice at the end of month.
33	Service charges must be imported before the invoice at the end of month.
34	A Contract must be referenced when calculating Invoice Charges.
35	Invoice Charges must be the sum of all individual charge sources: Services + Warehouse + Shipping.
36	Each Charge must have a Charge Date and must not precede the Contract start date.

Glossary of Terms

Term	Definition
Client	The company that provides the products to handle and to be billed.
Agent	The individual or company that the client's product is provided too. Also known as the Customer
Clerk	Wizzard Services person who helps process agent's orders.
Rate Table	The different prices associated with a service or product depending on its condition and other attributes.
Services	The different services Wizzard Services provides such as labor, phone services, etc..
Service Charges	Charges for the different services provided.
Invoice	A collection of all the orders and charges accrued for each client.
Contract	Agreement on how much and the method that charges and services will be billed at.
Product	The item provided by a client to be sold to agents.
Location	The location of warehouses to be used to store products.
Shipping charges	Charges obtained by using third-party shipping companies.
Warehouse charges	Charges related to receiving, packaging and destroying products.
Charge Plan	A set of various charges and how they are calculated that belong together to make up a contract(s)
Invoice Management (IM)	Handles generating, modifying and altering invoices and maintaining clients.
Order Entry (OE)	Recording and managing customer orders within a business system
Delivery Service Provider	A Delivery Service Provider is a third-party company responsible for transporting and delivering orders from the warehouse to the client's Agents (customers).
Account Receivable (AR)	is the department responsible for managing and collecting payments from clients based on the invoices.

Time Sheets

Boyu Zhang - week 2025-14				Enter real as planned		Validate work		03/31/2025 - 04/06/2025								03/31/2025	
task			start	end	assigned	real	Mo 31	Tu 01	We 02	Th 03	Fr 04	Sa 05	Su 06	left	revised		
⚙️ Assign4_12							2	0	0	0	0	0	0	2			
🔗	Use Case Diagram	Analyst	03/10/2025	03/14/2025	0	1.25								0	1.25		
🔗	Package Diagram	Analyst	03/10/2025	03/18/2025	0	1.25								0	1.25		
🔗	Activity Diagram	Analyst	03/10/2025	03/18/2025	0	0.75								0	0.75		
🔗	State Chart	Analyst	03/10/2025	03/18/2025	0	0.75								0	0.75		
🔗	Entity Model	Analyst	03/10/2025	03/18/2025	0	1								0	1		
🔗	Glossary of Terms	Analyst	03/10/2025	03/18/2025	0	1								0	1		
🔗	Business Rules	Analyst	03/31/2025	03/31/2025	0	2	2							0	2		
unit for Timesheet (real work) = hours (7.5 h/d)							2	0	0	0	0	0	0	2			

Michael James Fischer - week 2025-14				Enter real as planned		Validate work		03/31/2025 - 04/06/2025								03/31/2025	
task			start	end	assigned	real	Mo 31	Tu 01	We 02	Th 03	Fr 04	Sa 05	Su 06	left	revised		
🔧 Assign4_12							2	0	0	0	0	0	0	2			
🔗	Use Case Diagram	Analyst📅	03/10/2025	03/14/2025	0	2								0	2		
🔗	Package Diagram	Analyst📅	03/10/2025	03/18/2025	0	0.75								0	0.75		
🔗	Activity Diagram	Analyst📅	03/10/2025	03/18/2025	0	0.75								0	0.75		
🔗	State Chart	Analyst📅	03/10/2025	03/18/2025	0	1								0	1		
🔗	Entity Model	Analyst📅	03/10/2025	03/18/2025	0	1.25								0	1.25		
🔗	Glossary of Terms	Analyst📅	03/10/2025	03/18/2025	0	0.5								0	0.5		
🔗	Business Rules	Analyst📅	03/31/2025	03/31/2025	0	2	2							0	2		
unit for Timesheet (real work) = hours (7.5 h/d)							2	0	0	0	0	0	0	2			

Peiman Zhiani Asgharzadeh - week 2025-14					Enter real as planned		Validate work		03/31/2025 - 04/06/2025								03/31/2025	
task			start	end	assigned	real	Mo 31	Tu 01	We 02	Th 03	Fr 04	Sa 05	Su 06	left	revised			
⚙️ Assign4_12							2	0	0	0	0	0	0	2				
🔗	Use Case Diagram	Analyst	03/10/2025	03/14/2025	0	1.75								0	1.75			
🔗	Package Diagram	Analyst	03/10/2025	03/18/2025	0	1								0	1			
🔗	Activity Diagram	Analyst	03/10/2025	03/18/2025	0	0.75								0	0.75			
🔗	State Chart	Analyst	03/10/2025	03/18/2025	0	1								0	1			
🔗	Entity Model	Analyst	03/10/2025	03/18/2025	0	1								0	1			
🔗	Glossary of Terms	Analyst	03/10/2025	03/18/2025	0	0.5								0	0.5			
🔗	Business Rules	Analyst	03/31/2025	03/31/2025	0	2	2							0	2			
unit for Timesheet (real work) = hours (7.5 h/d)							2	0	0	0	0	0	0	2				