List of Requirements in BPMN:

- Sending out invoices manually (new/existing customers)
- Keeping track of invoices
- Keeping track of trouble for starting customers
- Select available discounts
- Sending out custom packages

Sending out invoices manually:

- Look at emails and list of customers which ones need an invoice
- For each customer, look at their subscription and its price, including any discounts
- In Moneybird, create an invoice for that customer
- Send it out to the customer
- Repeat for each customer

Keeping track of invoices:

- Look at the list of invoices in Moneybird to see which payments are not complete
- Make a list of customers that didn't complete their payments yet
- Send out an email to each of these customers and if it took longer than the deadline period, call them by phone instead

Keeping track of trouble for starting customers:

- Look at the list of customers in the system to see which customers didn't complete their first login form yet
- Make a list of customers that didn't complete their form
- Send out an email to each of these customers with instructions on how to start, and if it takes longer than the deadline period, call them instead
- If they answer and need help, spend time via the phone or email to help them out, or solve the issue if it's on our side
- If they finish their login form, start the "Sending out custom packages" process

Select available discounts:

- Look at emails and list of customers
- For each customer, look at their subscription and its price
- If available, apply discount to one customer at the time
- Create new invoice via Moneybird with the applied discount
- Send new invoice with moneybird manually

Sending out custom packages:

- Look at the list of customers in the system who recently completed their forms and did not receive a starter package
- Send them a starter package based on their subscription of choice
- Send them an email that this package has been sent to them

Interview questions:

- Where do you see the list of customers that haven't filled in their login form yet?
- Where do you see the list of customers that still need an invoice?

Customer:

1. Fill in the form
2. Submit the form

OIB Manager:

1. Check if the form has been submitted (every day)
2. (if 1 week passed without form being submitted) Send out email instructions
3. (if 3 weeks passed without form being submitted) call the customer for instructions
4. Confirm the form has been submitted