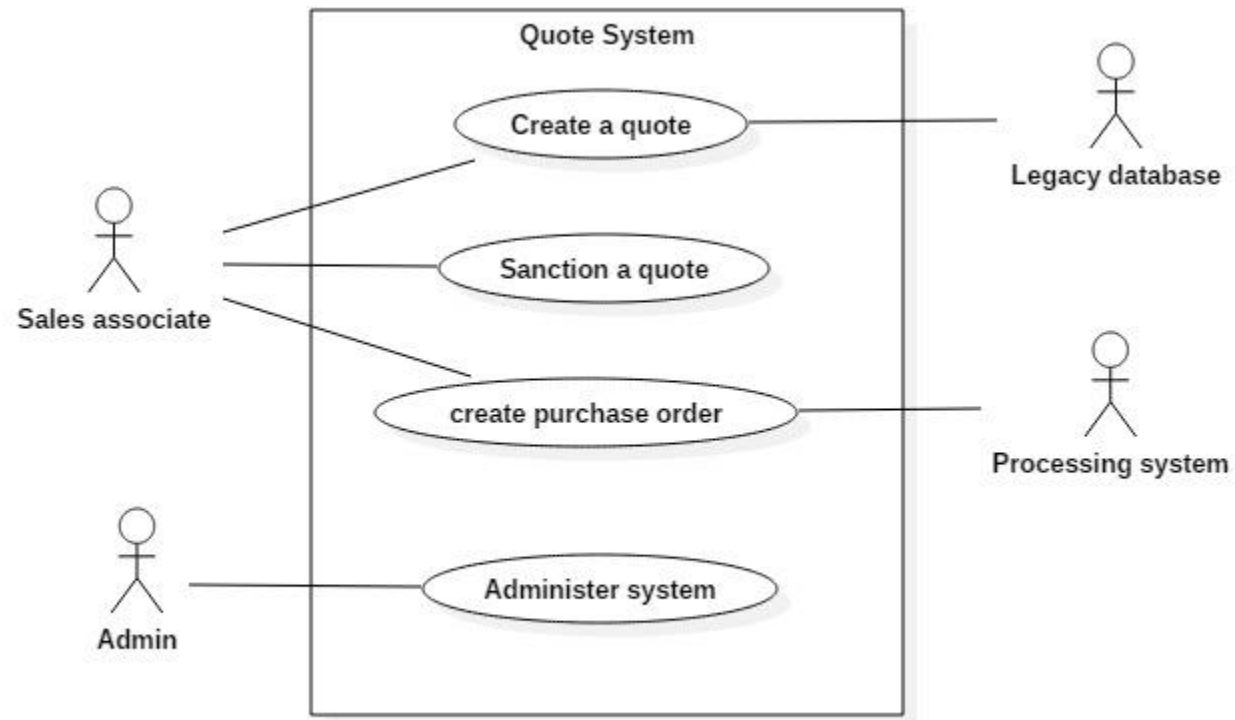# Quote System Use Case

Undergraduate Group #2

John Ayling, CJ Yoder & Mitch Myers
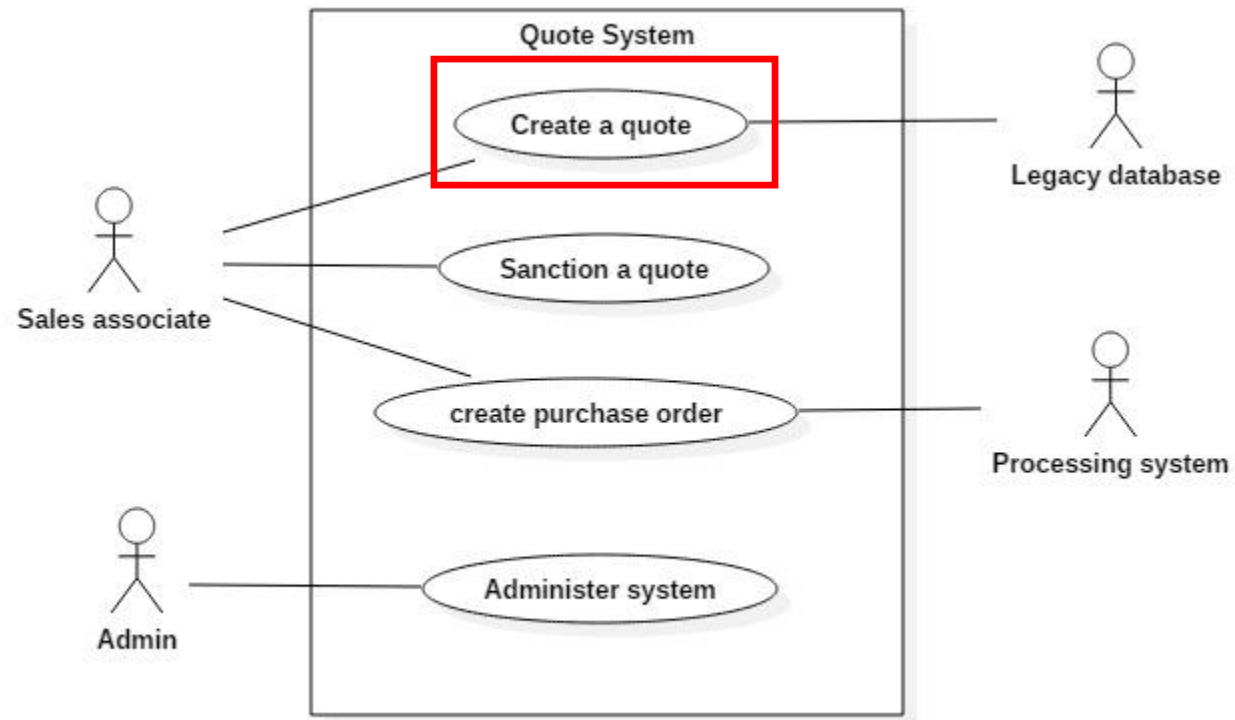
Quote System Use Case

Actor Dictionary

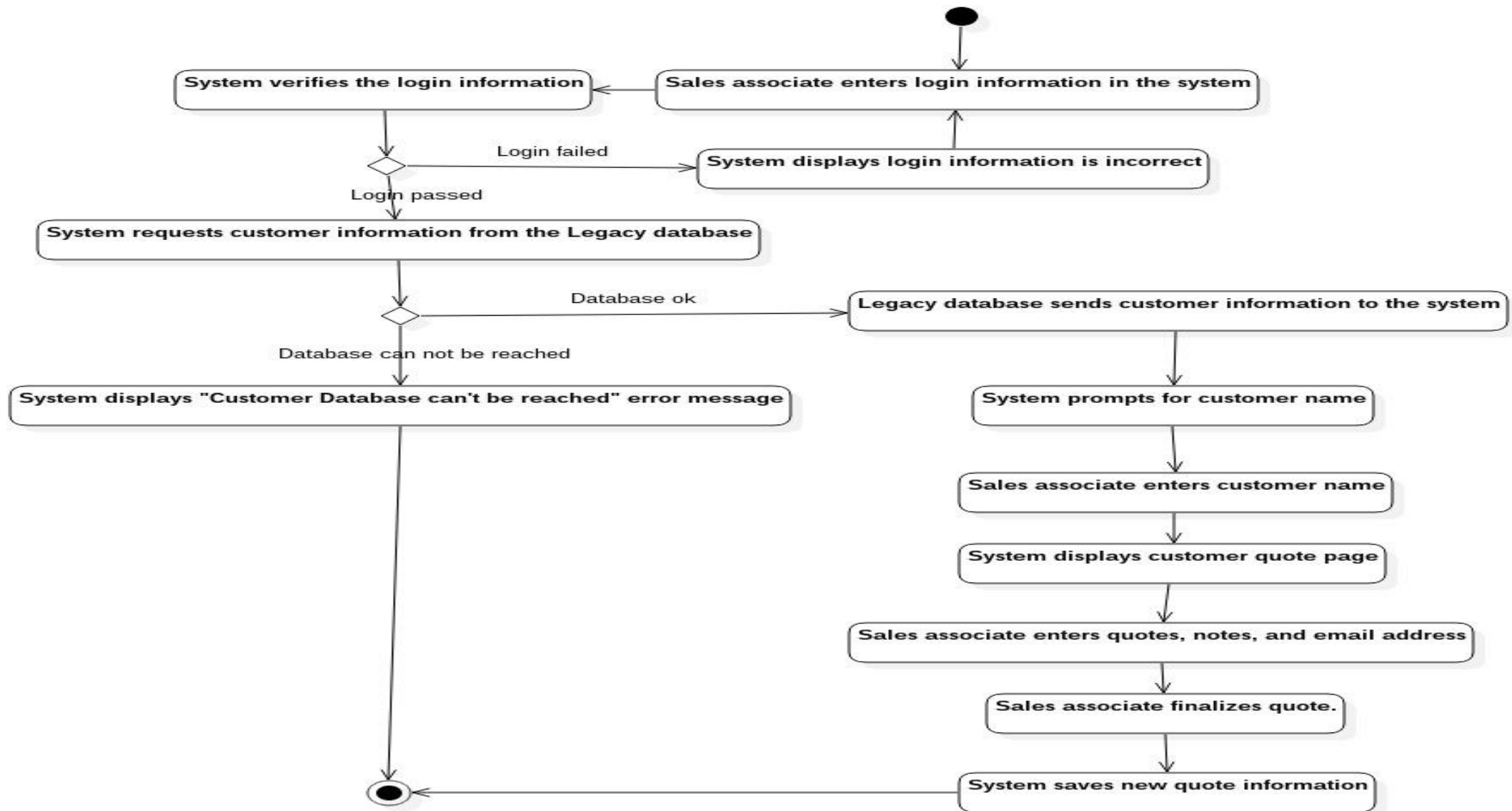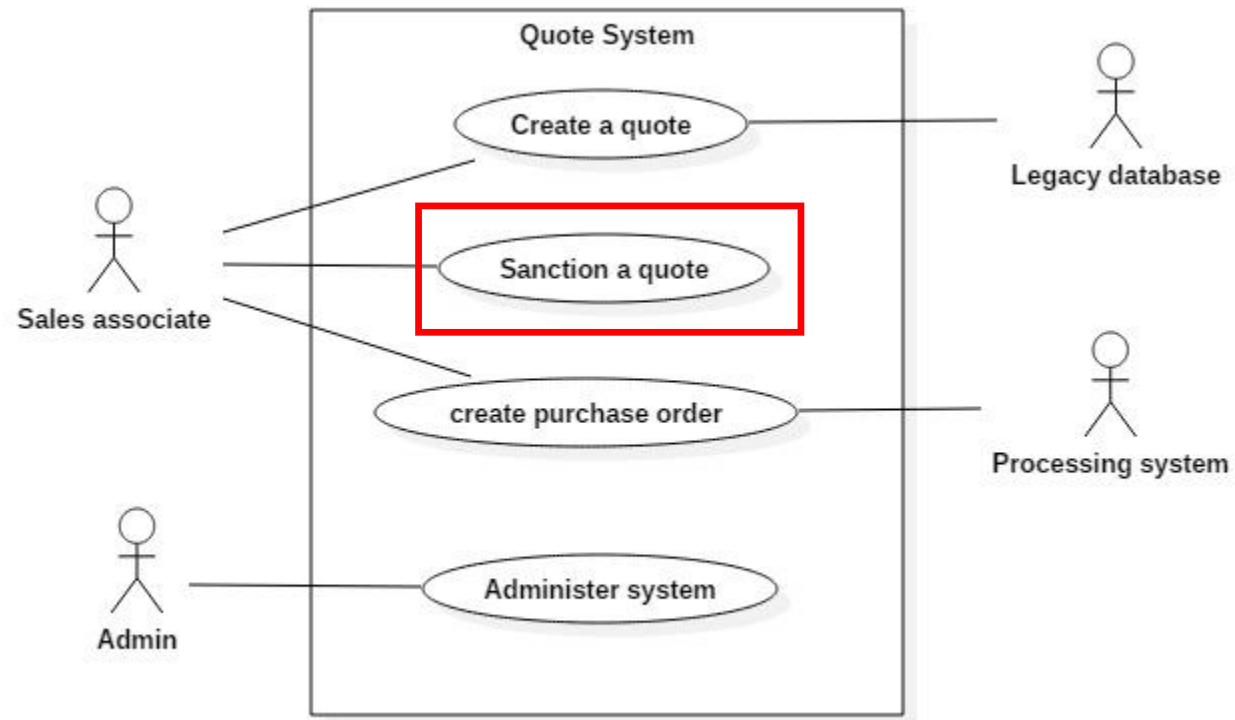| Actor	Description	Use Case(s)
Sales Associate	The Sales Associate can login to the associate logs in, (s)he can then enter sales quotes for customers. They can then convert a quote into a purchase order.	Create a quote, sanction a quote, Create a purchase order
Admin	Using the administrative interface, the admin can maintain sales associate and quote information. They can view, add, edit and delete sales associate records. The admin can also search and view quotes based on status (finalized, sanctioned, ordered), date range, sales associate, and customer.	Create a purchase order
Legacy Database	The legacy database is a list of existing customers with customer name, address, and contact info that can be used for a quote	Create a quote
Processing system	A purchase order is sent to a processing system which answers with a processing date and sales commission rate for the sales associate	Administer system

Quote System Use Case

Create a Quote Specifications

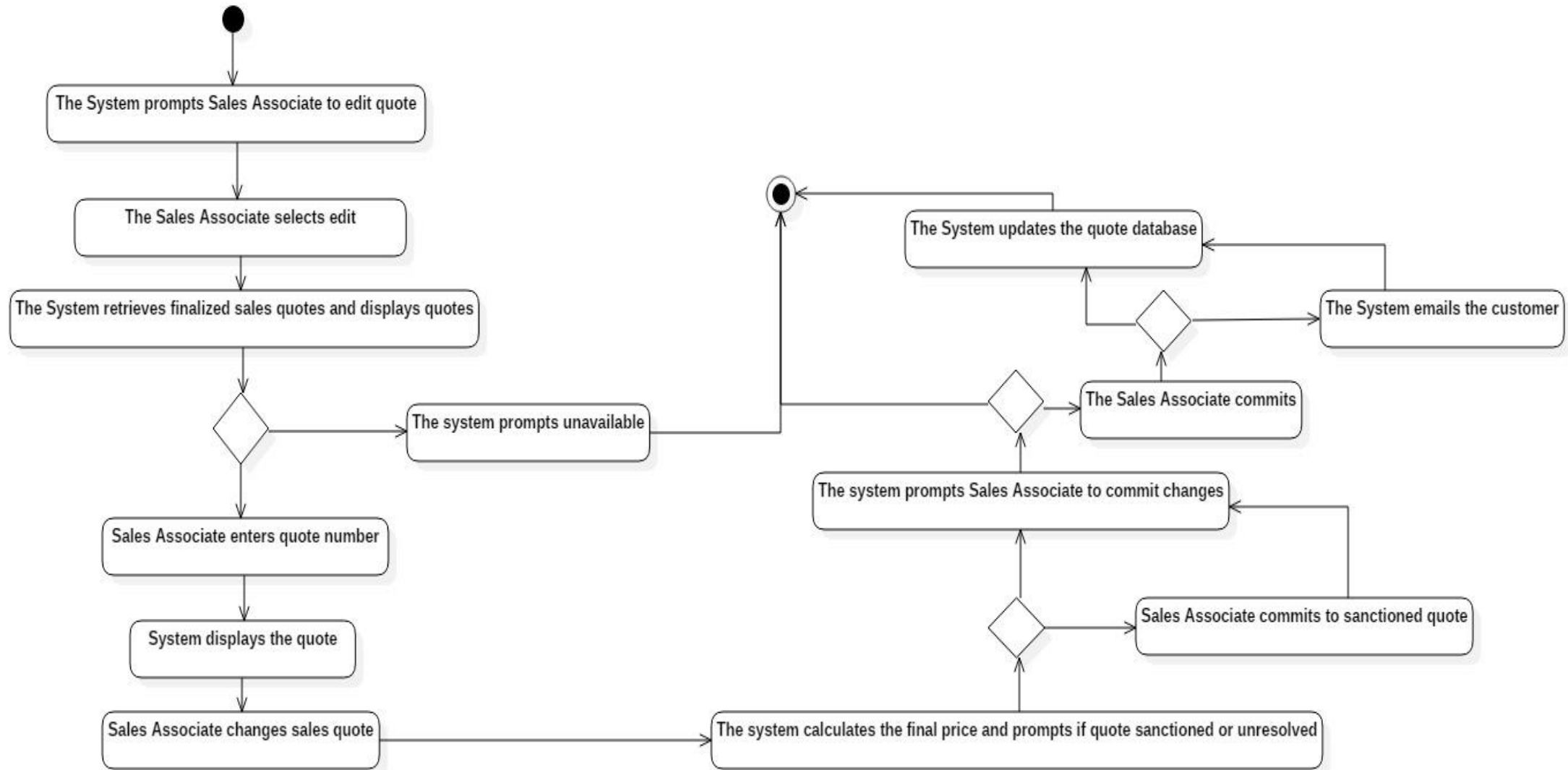| Name	Create a quote
id	1
Scope	Quote System
Priority	High
Summary	After the associate logs in (s)he can enter sales quotes for customers. Quotes are entered for existing customers, their information is maintained in a company legacy database with customer name, address, and contact info. A quote consists of multiple line items. Each line item has a free form description and a price. The associate can also attach secret notes of free form text. The quote is entered into a new quote database. The associate also attaches a customer e-mail address to the quote, which is used as e-mail destination for communication as the quote is processed. The associate can edit quotes until (s)he finalizes the quote.
Primary Actor	Sales associate
Supporting Actor(s)	Legacy database
Stakeholders	N/A
Generalization	N/A
Include	N/A
Extend	N/A
Precondition	N/A
Trigger	N/A
Normal Flow	1. Sales associate enters login information into the system. 2. System verifies the login information. 3. System requests customer information from Legacy database. 4. Legacy database sends customer information to the system. 5. System prompts for customer name. 6. Sales associate enters customer name. 7. System displays customer quote page. 8. Sales associate enters quotes, notes and email address. 9. Sales associate finalizes quote. 10. System saves new quote information.
Sub-Flows	N/A
Alternate Flow/Exceptions	Alternate: 3. System displays login information is incorrect. 4. Return to step #1 Exceptions: 1. Legacy database can not be reached Display error message and exit system
Postcondition	A finalized quote is created
Open Issues	
Source	Problem Statement
Author	John Ayling
Revision and Date	Ver.2 7/10/2007

Create a Quote Activity Diagram

System verifies the login information ← Sales associate enters login information in the system

Login failed → System displays login information is incorrect

Login passed

System requests customer information from the Legacy database

Database ok → Legacy database sends customer information to the system

Database can not be reached

System displays "Customer Database can't be reached" error message

System prompts for customer name

Sales associate enters customer name

System displays customer quote page

Sales associate enters quotes, notes, and email address

Sales associate finalizes quote.

System saves new quote information

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Quote System Use Case

Sanction a Quote Specifications

Name	Sanction a Quote
id	2
Scope	Quote System
Priority	High
Summary	Allows the user to modify finalized quotes
Primary Actor	Sales Associate
Supporting Actor(s)	Quote Database
Stakeholders	n/a
Generalization	n/a
Include	n/a
Extend	n/a
Precondition	A quote has been finalized
Trigger	Emails a sanctioned quote to customer
Normal Flow	1. The system prompts Sales Associate to Edit quote 2. The Sales Associate selects Edit 3. The System queries quote database for finalized quotes & displays quotes 4. The Sales Associate enters a sales quote number 5. System displays the quote 6. The Sales Associate makes changes to the quote 7. The system calculates the final price and prompts if quote sanctioned or unresolved 8. The Sales Associate commits to sanctioned quote 9. The system prompts Sales Associate to commit changes 10. The Sales Associate commits 11. The system updates the quote database & emails customer
Sub-Flows	See Activity Diagram
Alternate Flow/Exceptions	See Activity Diagram
Postcondition	A sanctioned quote is created and emailed to the customer
Open Issues	
Source	Problem Statement
Author	Mitch Myers
Revision and Date	Rev. 1 – 7/7/17

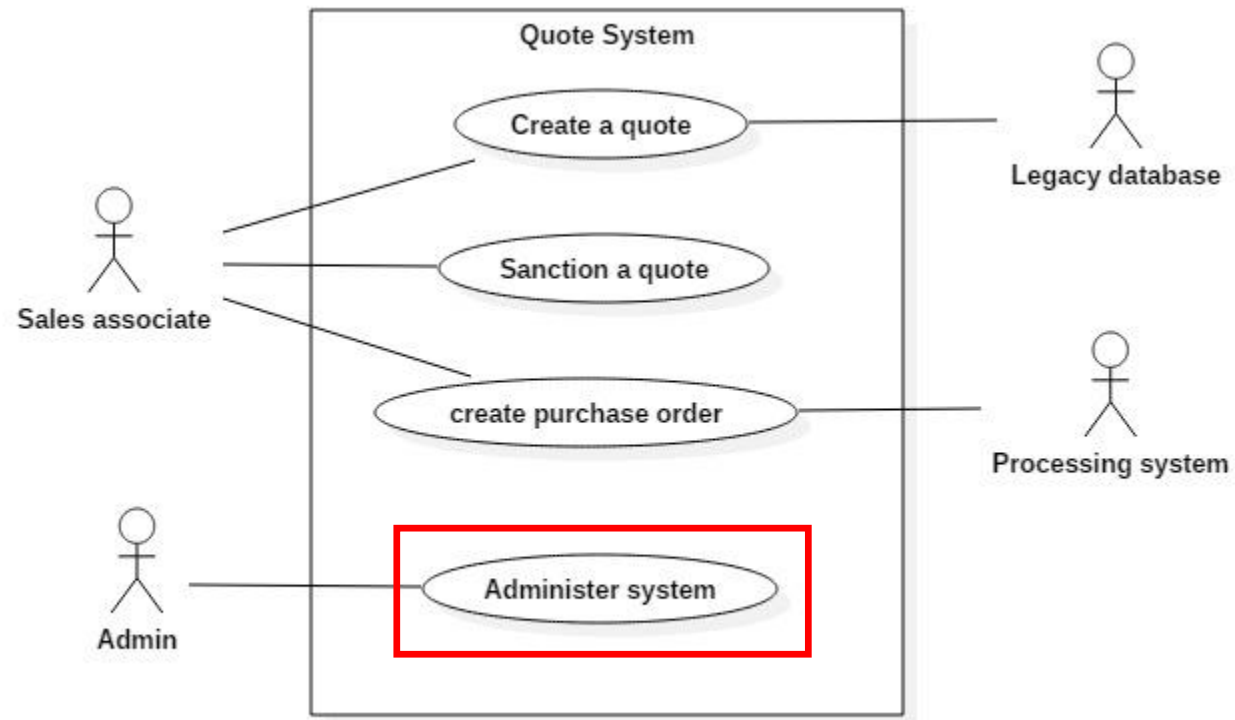# Sanction a Quote Activity Diagram

Quote System Use Case
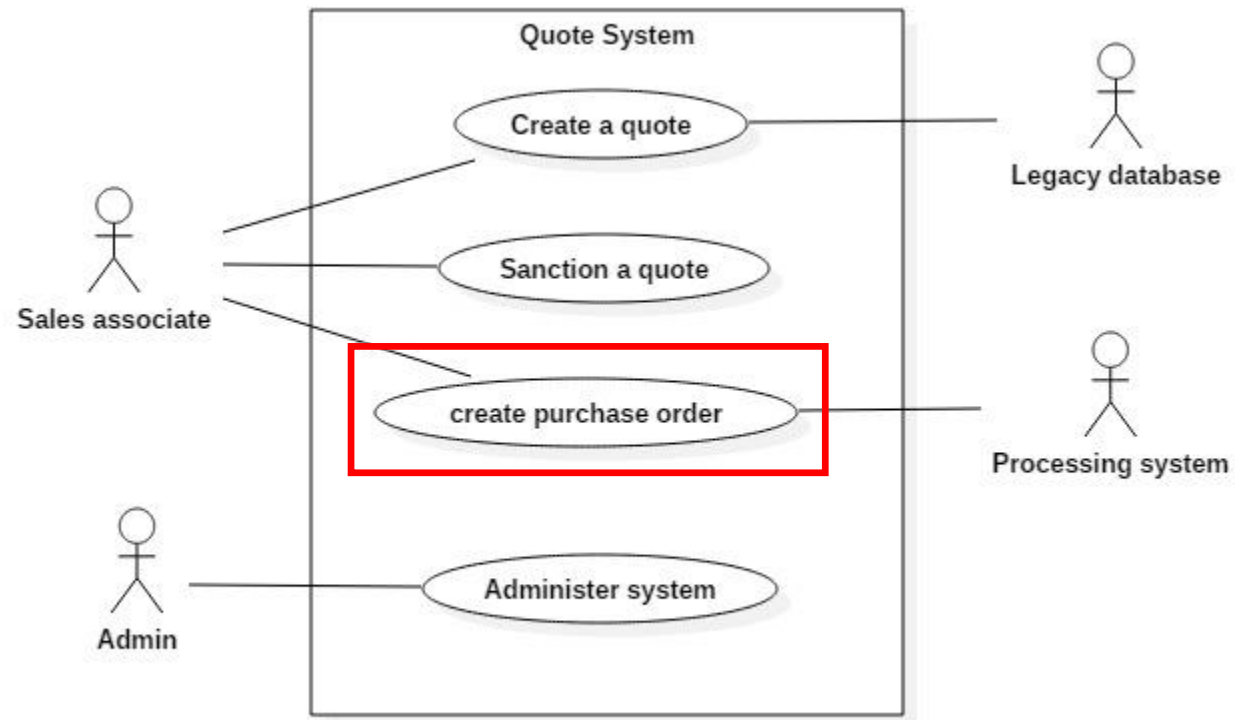
Create Purchase Order Specifications

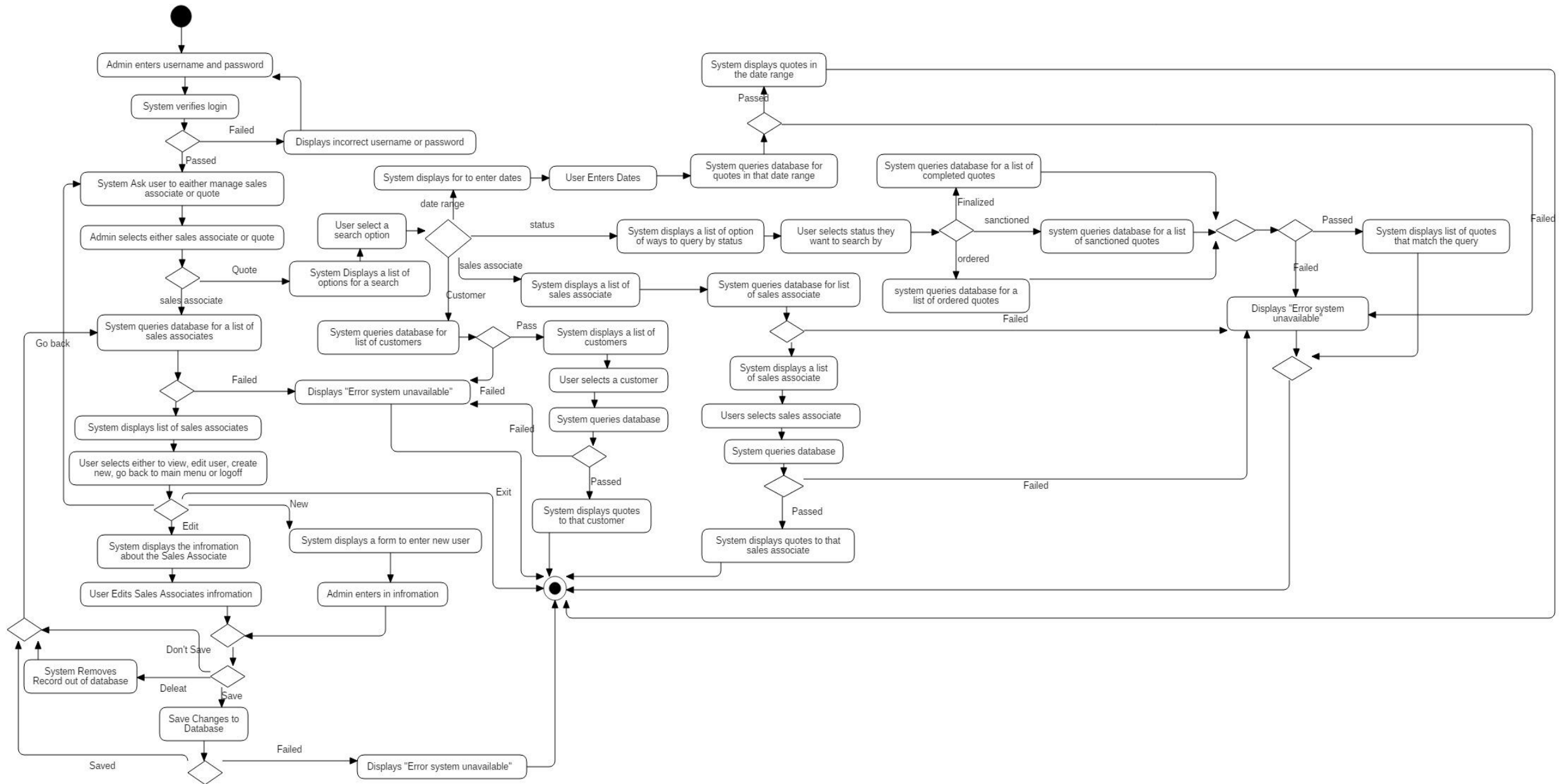| Name	Create Purchase Order
id	3
Scope	Quote System
Priority	High
Summary	Converts a quote to a Purchase Order
Primary Actor	Sales Associate
Supporting Actor(s)	Processing System
Stakeholders	n/a
Generalization	n/a
Include	n/a
Extend	n/a
Precondition	Sanctioned quote sent to customer
Trigger	Sanctioned quote approved by customer
Normal Flow	1. The sanctioned quote is approved 2. The Sales Associate enters quote number 3. The System queries quote database & displays quote 4. The Sales Associate applies final discounts to quote 5. The System calculates the new price & prompts for confirmation 6. The Sales Associate commits changes 7. The System converts the quote to a purchase order 8. The System sends the purchase order to processing system 9. The processing system calculates a processing date 10. The processing system calculates sales commission 11. The processing system adds commissions to accumulated commissions 12. The processing system stores accumulated commissions 13. The processing system stores the purchase order details 14. The processing system sends purchase order details to Sales Associate 15. The processing system sends purchase order to customer 16. The processing system closes connection
Sub-Flows	See Activity Diagram
Alternate Flow/Exceptions	See Activity Diagram
Postcondition	Purchase order is created
Open Issues	
Source	Problem Statement
Author	Mitch Myers
Revision and Date	Rev 1 – 7/8/17

Create Purchase Order Activity Diagram
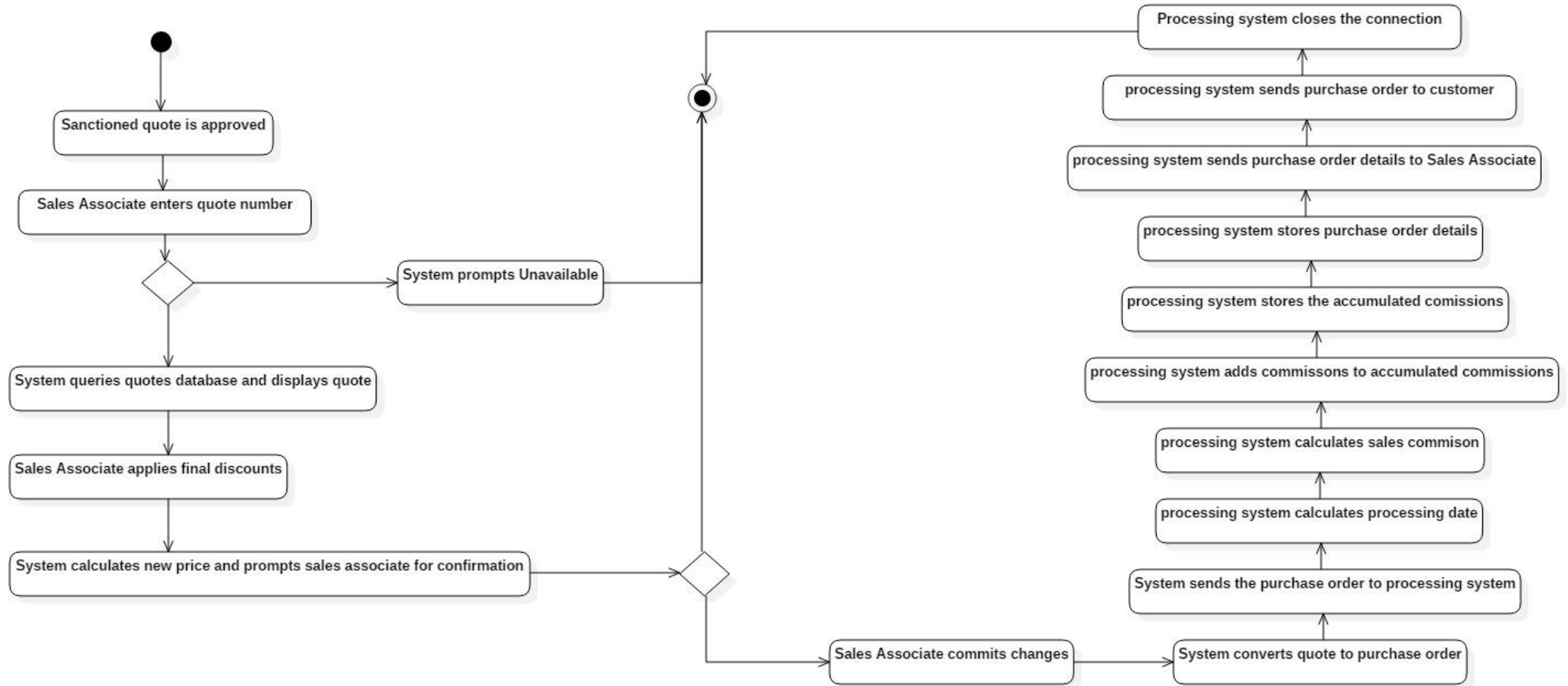
Quote System Use Case

Administer System Specifications

Name	Administer System
id	4
Scope	Quote System
Priority	High
Summary	The Admin can manage records of sales associate and quote information.
Primary Actor	Admin
Supporting Actor(s)	N/A
Stakeholders	N/A
Generalization	N/A
Include	N/A
Extend	N/A
Precondition	N/A
Trigger	N/A
Normal Flow	1. System asks Admin to either manage sales associates or quotes 2. Admin selects option 3. System queries database for list of sales associates 4. System displays a list of sales associates 5. Admin select the one to edit 6. System displays all the information about the sales associates 7. Admin updates needed information 8. System askes Admin if they want to save changes 9. System selects choice 10. Updates saved to database
Sub-Flows	See diagram
Alternate Flow/Exceptions	See diagram
Postcondition	Updated Records
Open Issues	
Source	Problem Statement
Author	Conrad Yoder
Revision and Date	Version 2 7/10/2017

Administer System Activity Diagram

Thank You!

Please feel free to ask any questions