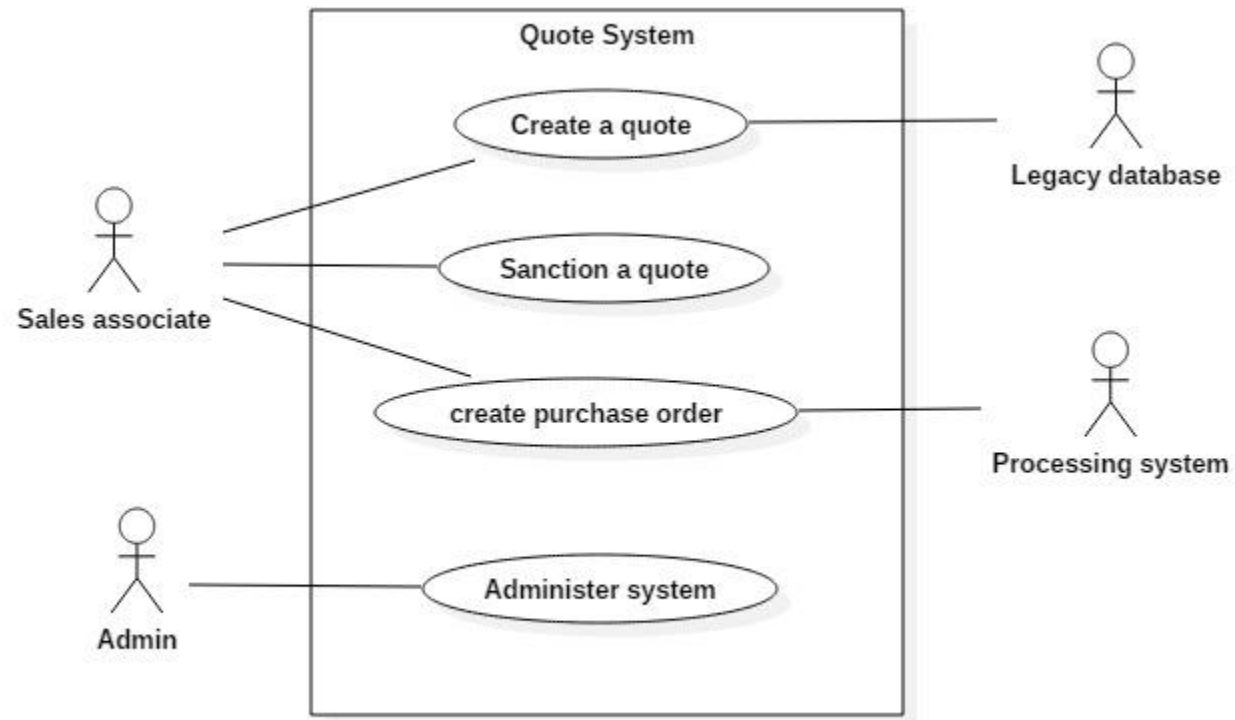


Quote System Use Case

Undergraduate Group #2

John Ayling, CJ Yoder & Mitch Myers

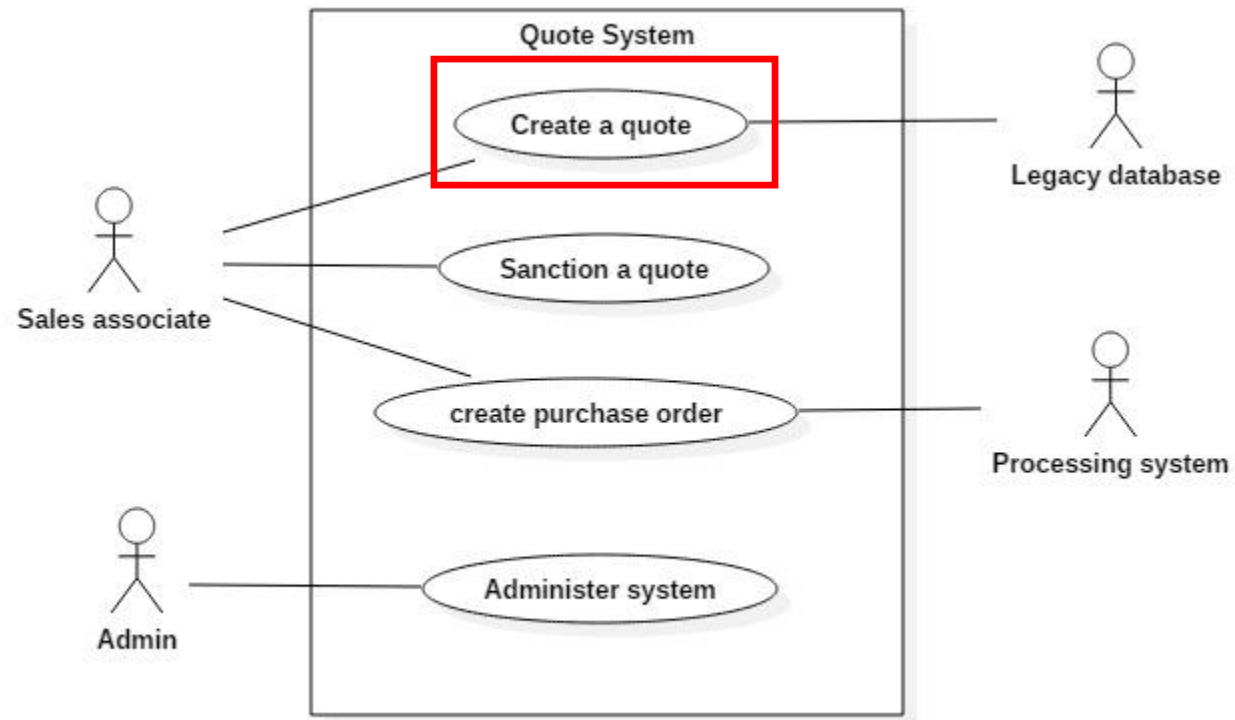
Quote System Use Case



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 |

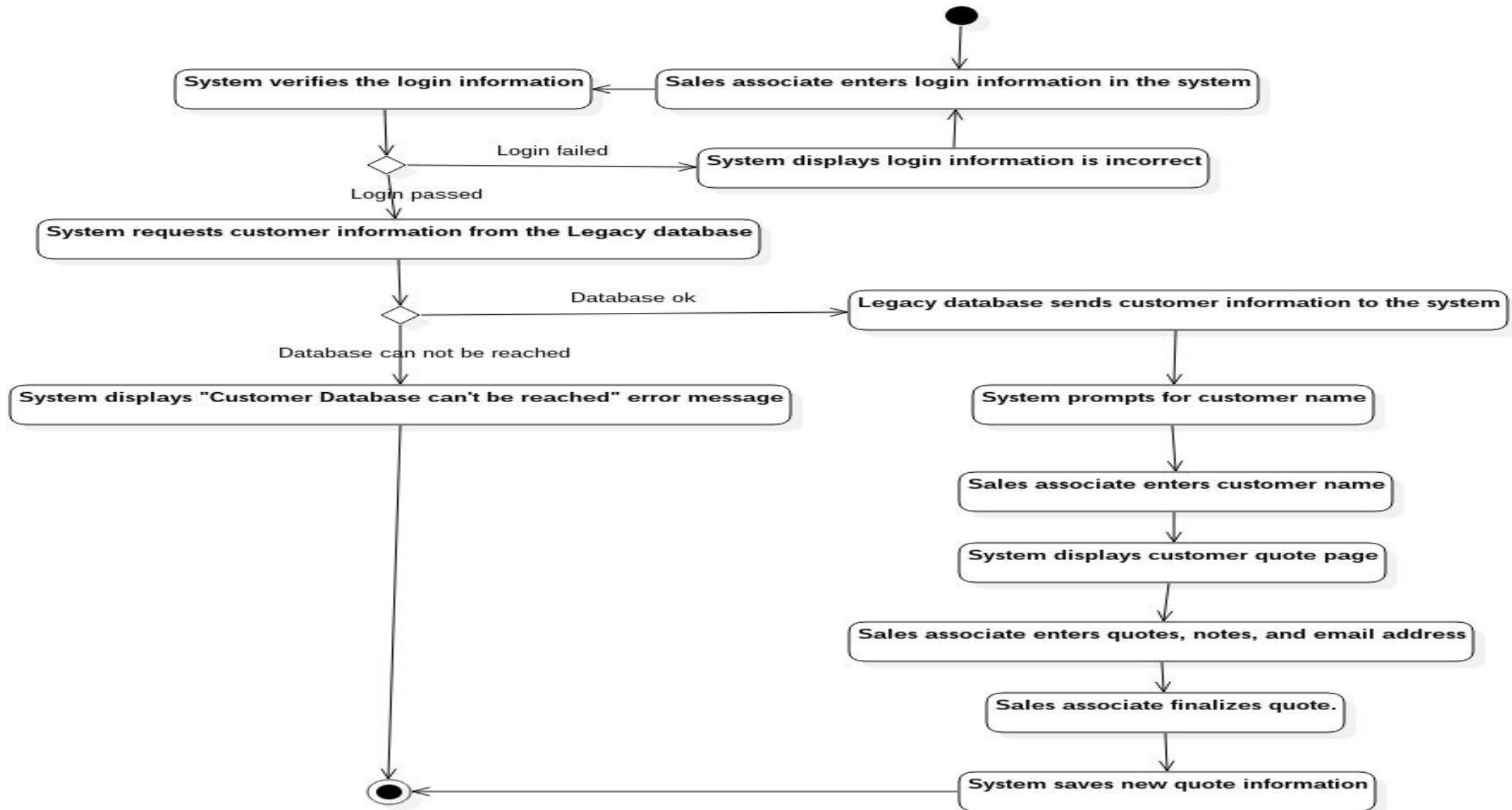
Quote System Use Case



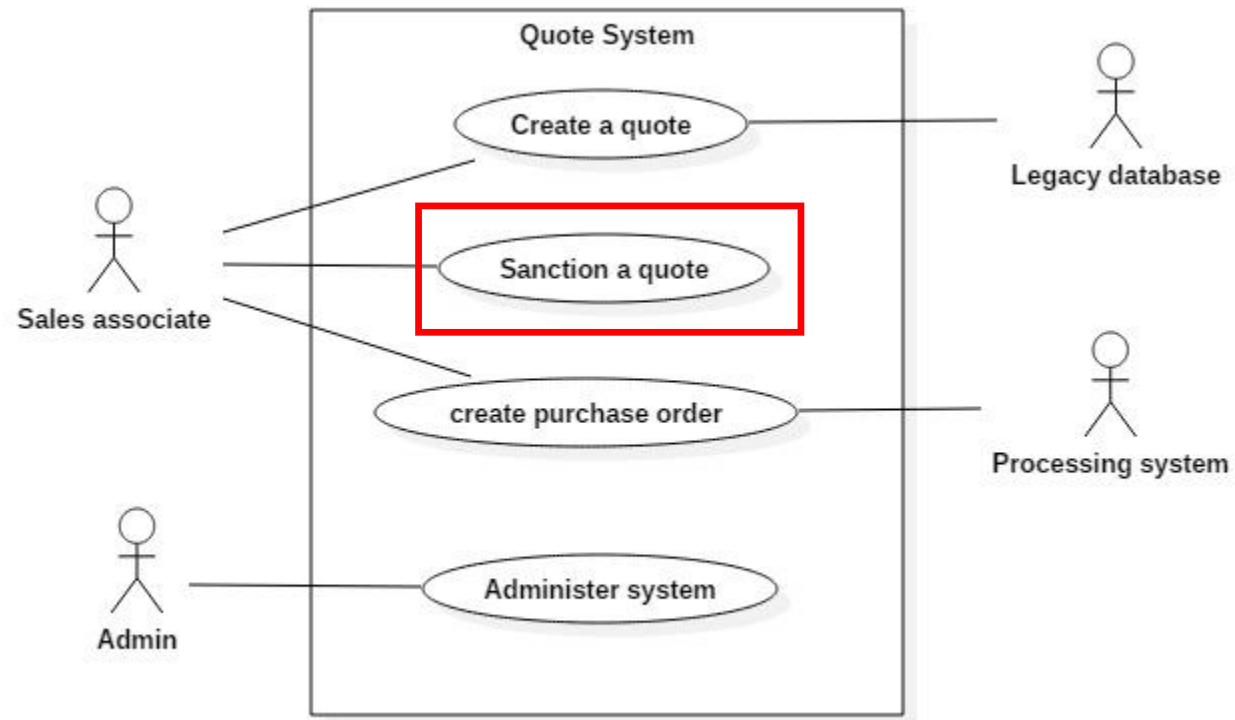
Create a Quote Specifications

| | |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 | <ol style="list-style-type: none"> 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: <ol style="list-style-type: none"> 3. System displays login information is incorrect. 4. Return to step #1 Exceptions: <ol style="list-style-type: none"> 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



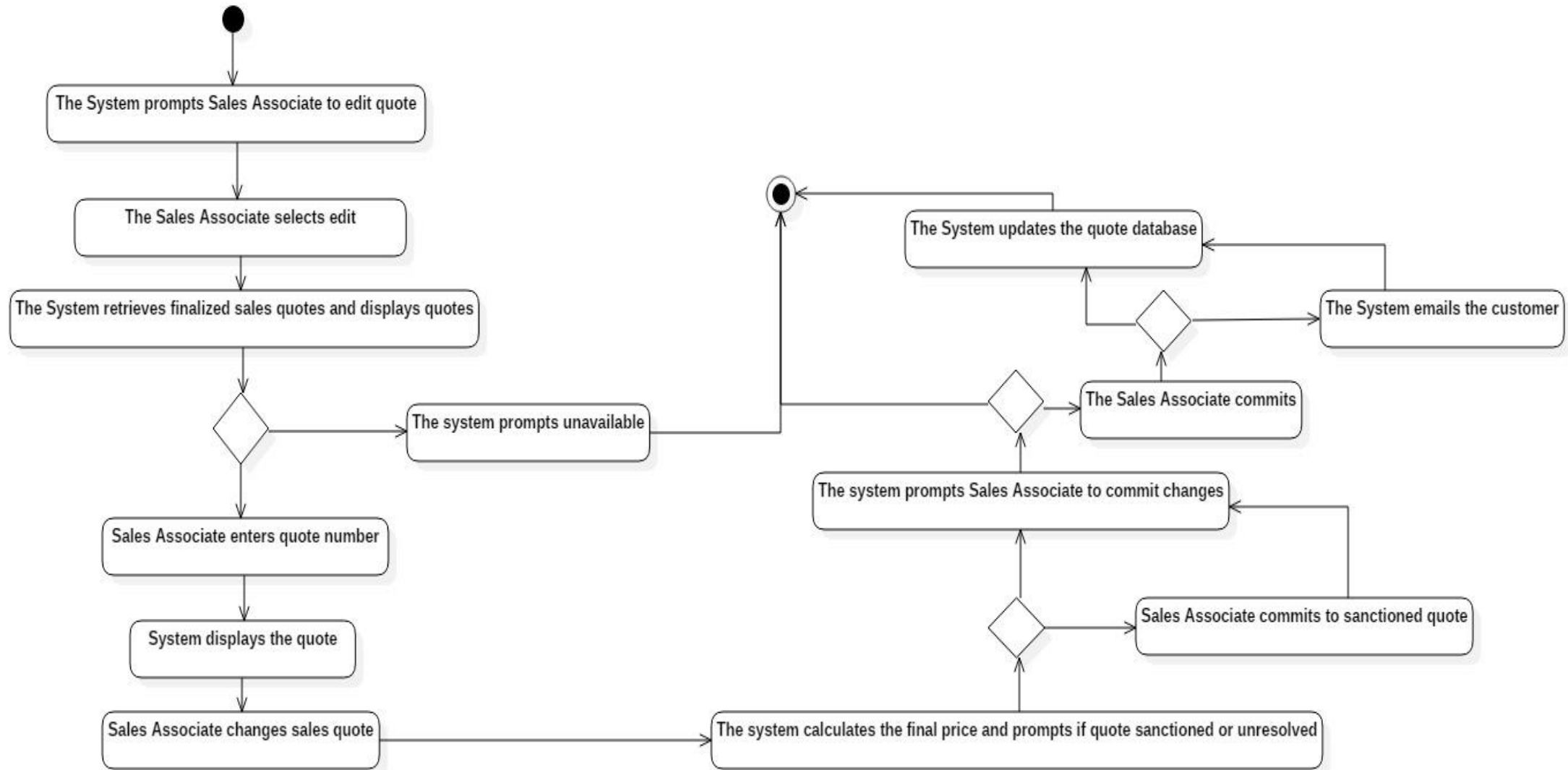
Quote System Use Case



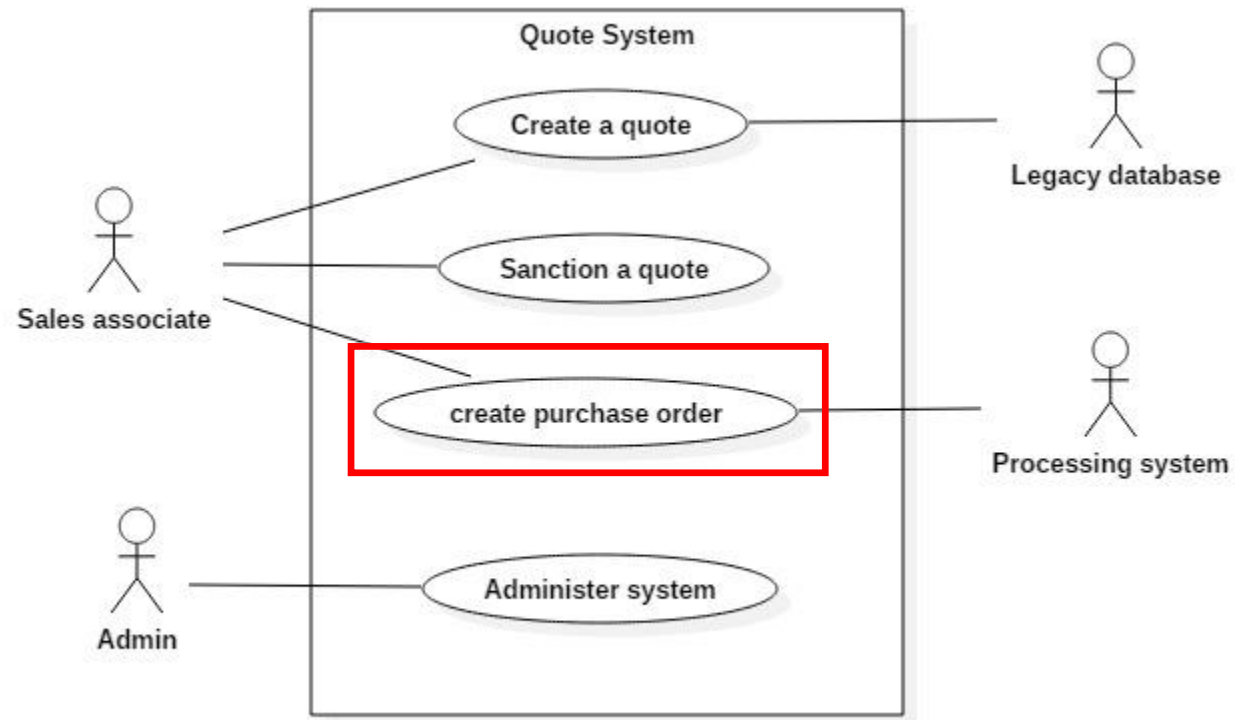
Sanction a Quote Specifications

| 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 | <ol style="list-style-type: none"> 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. 3 – 7/10/17 |

Sanction a Quote Activity Diagram



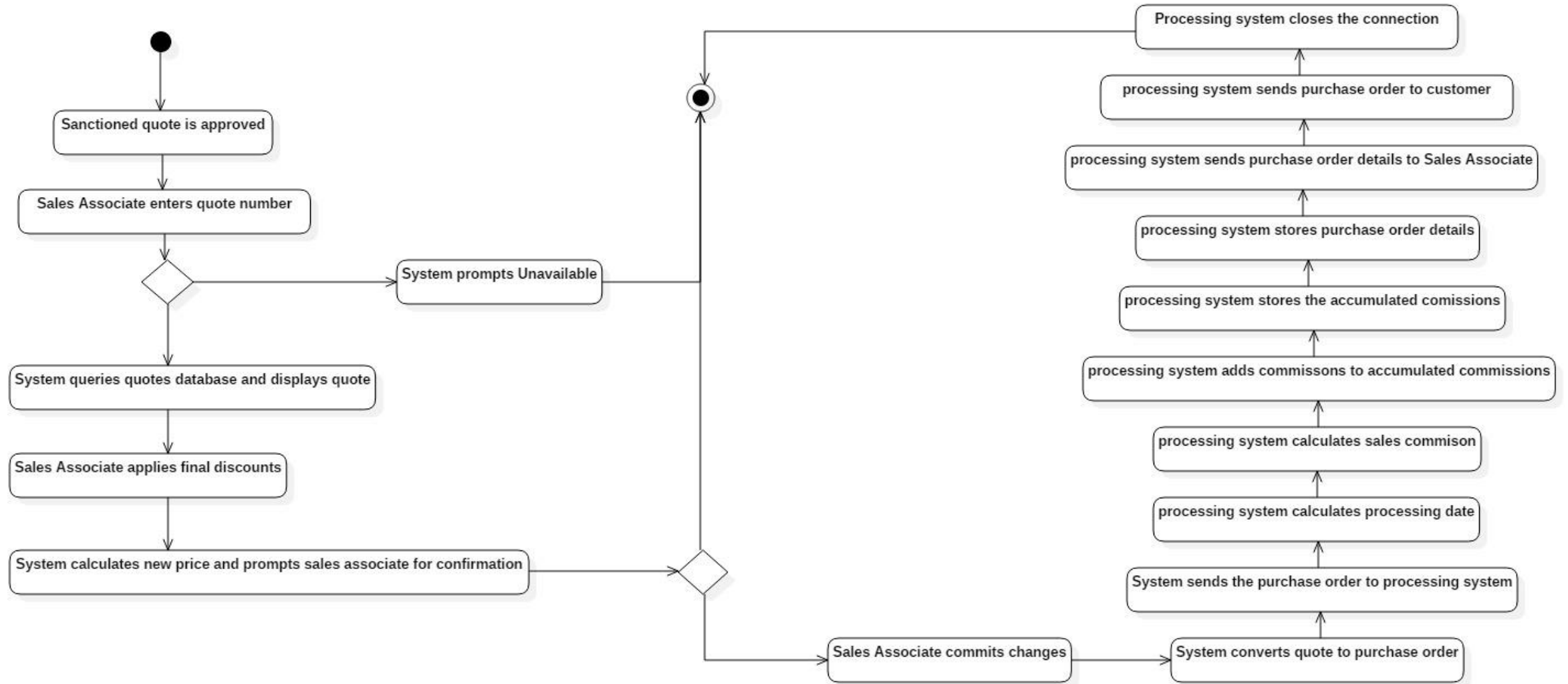
Quote System Use Case



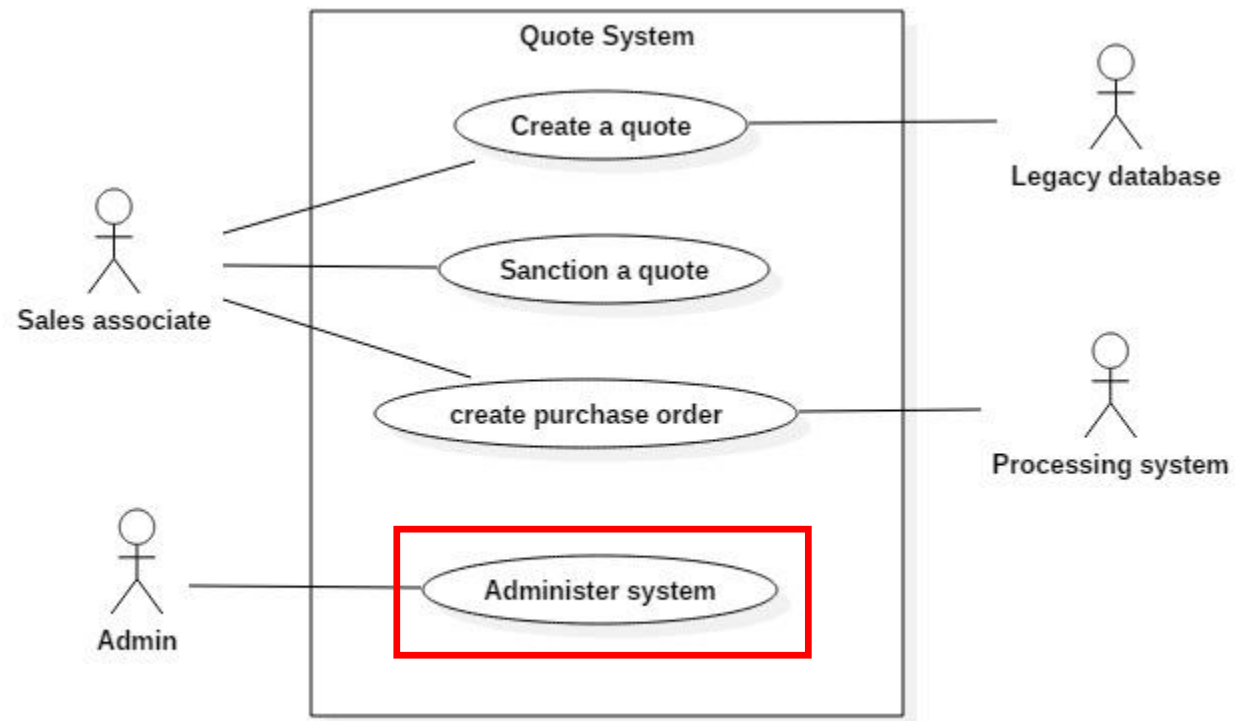
Create Purchase Order Specifications

| 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 | <ol style="list-style-type: none"> 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 2 – 7/10/17 |

Create Purchase Order Activity Diagram



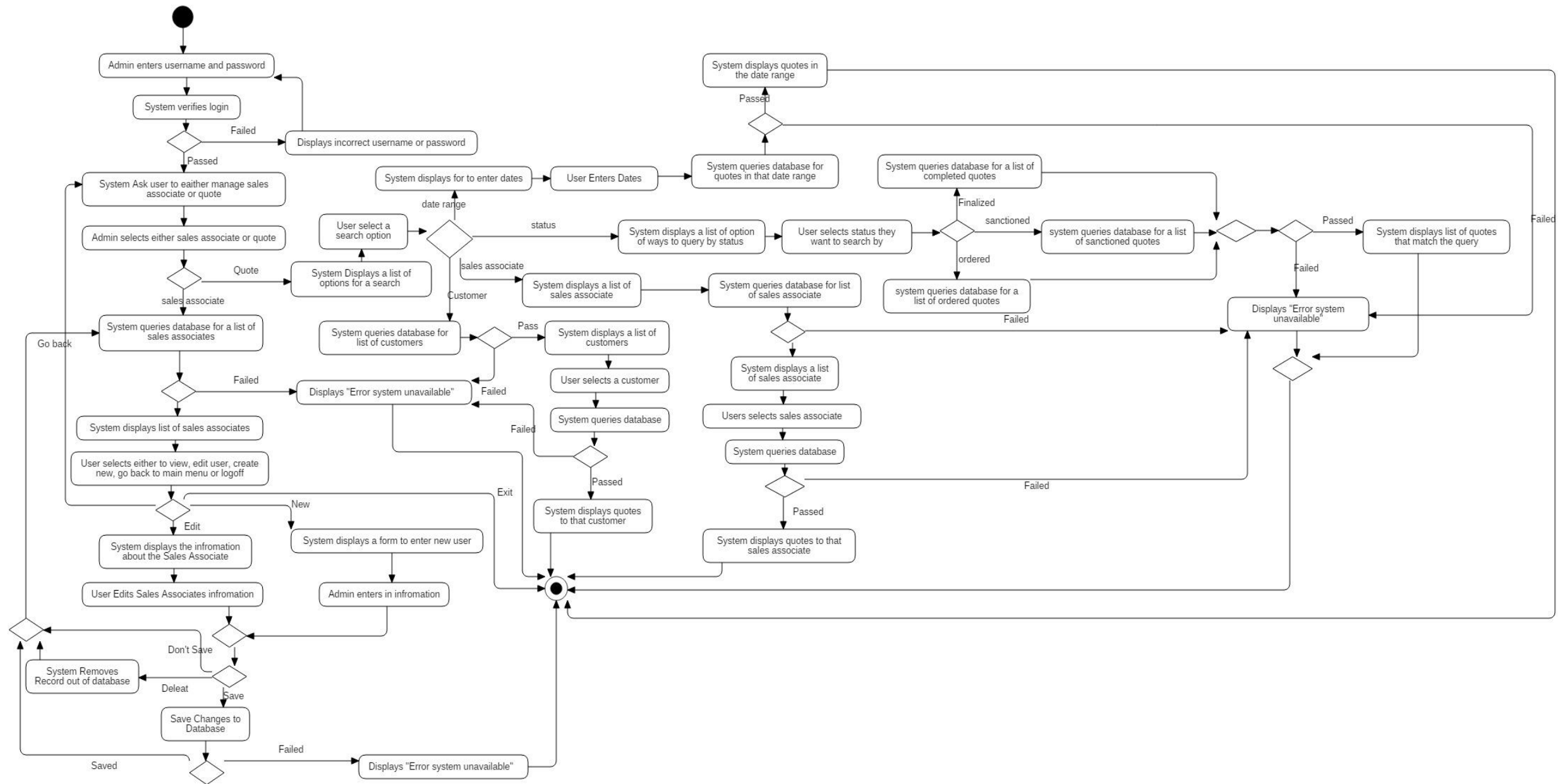
Quote System Use Case



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 | <ol style="list-style-type: none"> 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 asks 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