Use Case 1:

Actor: Customer

Scenario: Calling For Service

1. Contacted RadioSystems asking for service (do you contact them?)

2. Provided personal information (Data Set 1, what fields are optional??) (Directly entered into CRM?)

3. Company offers available appointment dates

4. Customer accepts appoint date and schedules (employee assigned now or later? Does same employee do sales call and installation?)

Data Set 1, what is optional?

Name

Referred by

Address

City

State

ZIP

Home Phone

Cell Phone

Email

Number of pets???

Pet Name(s)

Breed(s)

Age(s)

Appointment Date ?

Installation Date [same as Appointment date or scheduled for later](?)

Use Case 2:

Actor:

Scenario: Arriving at work

1. Employee arrives at work and connects service pro to CRM.

2. Database downloads appointments for the day.

Questions:

1.Is the surface pro theirs, or do the sales reps switch out surface pros with each other?

2. What version of surface pros are being used?

3. Is a login required on the surface pros?

4. Do you want a screen that has separate buttons for downloading, uploading, and doing contract?

5. Is data set one the data that we would need to download from CRM?

6. Can we have a relational uml diagram for the tables we will be pulling data from?

7. What type of database is the CRM? Do you use Microsoft SQl Server?

8. Do the employees have to come in to the office to update surface pro, or can this be done over wifi?

(applies to end of day as well?)

9. You mentioned speed is a concern, do you want the database on the surface pro cleared every night

(after data is backed up to CRM)? If not, How long should we save data in the SQlite database?

10. Does appointment info contain employee number and appointment date?

10a. If so, can we download by employee number and date each day?

10b. If not, what data would you like us to be downloading by?

11. Is final page of the contract on the surface pro the pdf of the full contract that the client signs?

12. What technology do you want to use for transferring data between CRM and also applications? Json, xml, some kind of DB?

12. What version of SQL server do you have?

Use Case 3

Actor: Employee

Scenario: Contracting For Service

1. Employee arrives for appointment and does presentation

2. Customer provides pet information and needs

3a. Employee offers design solutions?

3b. Customer chooses final design solution

4. Employee uploads data to contract application (Can we modify original program to off load number of devices bought?)

What technology do you want to use between the programs? Json or XML or some type of shared DB??)

5. Customer validates contact and purchase information screen-by-screen and provides coupon, if applicable.

6. Employee enters coupon/discount information, if applicable. (How does installation cost get tabulated?

Does employee need to enter additional data for this to happen?)

7. Customer reviews cost and signs.

8. Employee offers available installation dates?? How?

9. Customer sets installation date

10. Employee generates PDF (to customer email? if so, what if no email?)

If the person doesn't sign the contract, is the same employee sent back if they decide to sign? Also,

is the design that the customer does in the other application saved to be reused

Use Case 4:

Actor: Employee

Scenario: Clocking out

Employee returns to job site? and connects with CRM (Do they have to return or do they just get on wifi?)

CRM authenticates?? Does the system do this and how? Login? Open session?

Employee updates contract information and PDF?? Does PDF upload? Is it stored in the CRM, or just referenced by path or emailed to someone else?

CRM stores data (Does this project use Json objects, XML or something else for web API? )

(Does web API clear sqLite once uploaded?) and logs out??