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| --- | --- |
| Use Case Name | Create Customer Profile |
| Use Case ID | UC001 |
| Priority | High |
| Primary Business Actor | Marketing REP |
| Other Participating Actors | Regional Manager |
| Other Interested Stakeholders | CEO or the Board, Clients |
| Description | This use case is the event where the Marketing REP is creating a customer profile. |
| Steps Involved | 1. Worker logs in the application via credentials. 2. System verifies credentials and logs in the user. 3. System brings user to main interface. 4. User will navigate to the side tab to lookup/view clients. 5. User will click the + button next to search bar to create a new client profile. 6. User will enter all available client info (as well as anything extra). 7. Contact Info 8. Client name 9. Client Location 10. User will have to tag insure status. 11. If all information is valid, 12. System confirms and saves the profile. 13. Else, 14. System error codes invalid information. 15. End Use Case |

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| --- | --- |
| Use Case Name | Create / Edit Existing Client Info |
| Use Case ID | UC002 |
| Priority | High |
| Primary Business Actor | Marketing REP |
| Other Business Actor | Regional Manager |
| Other Interested Stakeholder | Client, CEO? |
| Description | This use case is the event where the Marketing REP is editing existing client information. |
| Steps Involved | 1. Worker logs in application via credentials. 2. System verifies credentials and logs user in. 3. System brings user to main interface. 4. User will click on the Create Client tab 5. Users will be bought from the client creation page. 6. Users will fill out required and optional info. 7. Users can interact with the cog wheel to edit any existing profile. 8. End Use Case |

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| --- | --- |
| Use Case Name | Adding and Editing Notes in Customer Profile |
| Use Case ID | UC003 |
| Priority | High |
| Primary Business Actor | Marketing Rep |
| Other Business Actor | Regional Manager |
| Other Interested Stakeholder | CEO? |
| Description | This use case is the event where the Marketing REP is adding extra details to their profile to remind themselves. |
| Steps Involved | 1. Worker logs in application via credentials. 2. System verifies credentials and logs user in. 3. System brings user to main interface. 4. Users can either look up clients in the right tab or select from recent clients. 5. User will select the desired client. 6. User will interact with the “+” symbol. 7. User will fill out desired information and save. |

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| --- | --- |
| Use Case Name | View / Modify Calendar Reminders and Schedule |
| Use Case ID | UC004 |
| Priority |  |
| Primary Business Actor | Marketing Rep |
| Other Secondary Actor | Regional Manager |
| Other Interested Stakeholders | Ceo |
| Description | This use case is the event where the Marketing REP is viewing current reminders/scheduling. |
| Steps Involved | 1. Worker logs in application via credentials. 2. System verifies credentials and logs user in. 3. System brings user to main interface. 4. Users can click on cog wheel on calendar widget to modify preferences. 5. Users can click on the + or any date to view current or create new reminders/events. 6. End Use Case |