



Actor Descriptions

Actor	Description	Use Case (s)
Sales Associate	Responsible for creating and managing sales quotes for customers	create quote
Company Employee	Retrieves the finalized quotes and edits them	process finalized quote
Other Company Employee	Responsible for converting finalized quotes into purchase orders once a customer agrees to proceed with the order	convert quote to purchase order
Administrator	Responsible for maintaining sales associate and quote information	search and view quotes data manage sale associate records
Legacy Customer DB	Stores information about existing customers, including their names, addresses, and contact info	create quote
External Processing System	Responsible for handling the purchase orders and returns the processing date and commission rate	convert quote to purchase order compute and record sales commission

Use Case Descriptions

1. Create Quote

Actors	Sales Associate, Legacy Customer Database
Description	The sales associate logs in then creates a new sales quote for an existing customer. Customer information is maintained by the company's legacy database. The quotes will be logged into the new quote database.
Data	New quote data: Line items that include description and price, Secret notes, Customer email address Customer information: name, address, contact info
Stimulus	Sales associate creates new quote
Response	Saves quote in new quote database
Comments	A quote consists of multiple line items. The associate can edit quotes until they finalize the quote

2. Process finalized Quote

Actors	Company employee
Description	Company Employee retrieves finalized quotes, adds/updates/deletes line items, gives discounts, changes price, retrieves secret notes added by sales associates and edits/adds new notes. Quotes are updated in the quote database.
Data	Quote Data: Line items that include description and price, Secret notes, Customer email address, Discount
Stimulus	Company Employee changes and updates the quotes
Response	Sanctioned quotes are sent as email to the customer

Comments	Final quotes updated by employees are saved and can be in an unresolved and sanctioned state. If they are sanctioned then an email with the quote is sent to the customer.
-----------------	--

3a. Converts Quote to Purchase Order

Actors	Other Company Employee, External Processing System
Description	The Other Company Employee accesses the quote after the Customer gives the go-ahead and can optionally enter a final discount. The final amount is computed, the purchase order is created and sent to the External Processing System.
Data	Quote, Final Discount, Purchase Order
Stimulus	The Other Company Employee converts quote into purchase order
Response	Sent to external processing system
Comments	The go ahead is given outside of the scope of this system, via phone or snail mail.

3b. Compute and Record Sales Commission

Actors	External Processing System
Description	The quote system receives from the external processing system a processing date and sales commission rate for the sales associate.
Data	Processing Date, Sales commission rate
Stimulus	The External Processing System sends response back to quote system with processing date and sales commission rate
Response	The system computes the commission and updates the sales associate's accumulated commission.

Comments	An email is sent to the customer with all the purchase details, including the processing date.
-----------------	--

4a. Manage Sales Associate Records

Actors	Administrator
Description	The Administrator can view, edit, add, and delete data about sales associates
Data	Name, User ID, Password, Accumulated Commission and Address
Stimulus	Administrator manages sales associate record with necessary details
Response	The sales associate records are updated and maintained
Comments	Sales associate information contains their name, user id, password, accumulated commission and address

4b. View Quotes

Actors	Administrator
Description	The Administrator can search and view quotes
Data	Quote Data, Customer Data, Date, and Sales Associate Data
Stimulus	Administrator searches or views for a particular Quote, Customer Data, Date Range, and or Sales Associate Data
Response	Provides the Administrator with the Quote Data, Customer Data, Date Range, Sales Associate Data based on the search perimeters

Comments	The Administrator can search by status (finalized, sanctioned, ordered), date range, sales associate, and customer.
-----------------	---