

### **User Case Model: Quote System (Tabular)**

#### Actors:

- Sales associates
  - Description: the individuals within the company's sales force who interact with customers, create quotes, and manage customer relationships. They use the custom quote tracking program to enter sales quotes for customers via the Internet platform. They can also attach secret notes to quotes.
  - Use cases: Record Sales Quote, Review and Add Secret Notes, Retrieve Quote for Editing
- Admin
  - Description: has access to an administrative interface to maintain sales associate and quote information. They can view, add, edit, and delete sales associate records. They can also search, and view quotes based on various criteria such as status, date range, sales associate, and customer.
  - Use cases: Maintain Sales Associate and Quote Info, Review and Add Secret Notes, Search and View Quotes
- HQ Staff
  - Description: interacts with the system through an interface that runs in-house at the company headquarters. They have the authority to retrieve finalized quotes, make modifications to quotes, add line items, edit, or remove line items, change prices, provide discounts, review, and add secret notes, update quote status, and send sanctioned quotes via email to customers.
  - Use cases: Modify quote at plant company, Manage Finalized Quotes (Quotes), Covert Quote to Purchase Order (Purchases)
- External processing system
  - Description: a system external to the company that processes purchase orders. Once a quote is converted into a purchase order, it is sent to this external system. The external system responds with a processing date and sales commission rate for the sales associate. The commission is then computed and recorded.
  - Use cases: Manage Finalized Quotes (Quotes), Covert Quote to Purchase Order (Purchases)
- Customer
  - Description: individuals or organizations seeking plant repair services from the company.
  - Use cases: Modify quote at plant company, Covert Quote to Purchase Order
- Customer DB (legacy)
  - Description: Responsible for database with customer information, including name, address, and contact info, is maintained in a legacy database.
  - Use cases: Record Sales Quote

### **Use Case Description 1: Maintain Sales Associate and Quote Info**

Actors: Admin

Description: Admin access the administrative interface to maintain sales associate records (view, add, edit, delete) and search/view quotes based on various criteria such as status, date range, sales associate, and customer.

Data: Sales associate information (name, user id, password, accumulated commission, address), quote information (status, date range, sales associate, customer).

Stimulus: Admin access the administrative interface.

Response: Sales associate and quote information is maintained and managed.

Comments: managing sales associate records and searching/viewing quotes.

### **Use Case Description 2: Record Sales Quote**

Actors: Sales Associate, Customer DB (legacy)

Description: Sales associates log in to the custom quote tracking program via the Internet platform and enter sales quotes for customers.

Data: Customer information (name, address, contact info), line items (description, price), secret notes, customer email address.

Stimulus: Sales associate initiates quote creation.

Response: Quote is recorded in the quote database. Sales associate can edit the quote until it is finalized.

Comments: the initial creation of sales quotes by sales associates.

### **Use Case Description 3: Review and Add Secret Notes**

Actors: Admin, Sales Associate

Description: Admin and sales associates can review and add secret notes to finalized quotes. These notes may contain additional information relevant to the quote or customer interactions.

Data: Finalized quote details, secret notes.

Stimulus: Admin or sales associate accesses a finalized quote.

Response: Secret notes are reviewed or added to the quote.

Comments: the functionality for adding and reviewing secret notes associated with finalized quotes.

#### **Use Case Description 4: Modify quote at plant company**

Actors: HQ Staff, Customer

Description: HQ Staff retrieve finalized quotes, make modifications (add line items, edit, or remove line items, change prices), provide discounts, review, and add secret notes, update quote status, and send sanctioned quotes via email to customers.

Data: Finalized quotes, line items, discounts, secret notes.

Stimulus: HQ staff has accessed the interface

Response: Quotes are updated in the quote database, either left unresolved or sanctioned.

Comments: internal management and modification of quotes before they are sent out to customers.

#### **Use Case Description 5: Manage Finalized Quotes (Quotes)**

Actors: External processing system, HQ Staff

Description: HQ Staff accesses the system interface to manage finalized quotes. They can retrieve quotes, add, edit, or remove line items, change prices, and apply discounts. Secret notes can be reviewed or added. Finalized quotes are updated in the quote database, categorized as unresolved or sanctioned. Sanctioned quotes are sent via email to the customer.

Data: Finalized quote, additional final discount, processing date, sales commission rate.

Stimulus: Staff members initiate conversion of quote into a purchase order.

Response: Purchase order is sent to the external processing system. Customer will receive an email with the purchase confirmation. Sales commission is computed and recorded.

Comments: the finalization of the quote into a purchase order and interaction with an external system for processing.

#### **Use Case Description 6: Covert Quote to Purchase Order (Purchases)**

Actors: External processing system, HQ Staff, Customer

Description: HQ Staff uses the in-house interface to convert a finalized quote into a purchase order once the customer confirms the order outside of the system's scope. They can apply additional discounts, compute the final amount, and send the purchase order to an external processing system. The external system responds with a processing date and sales commission rate for the sales associate, which are recorded.

Data: Finalized quote, additional final discount, processing date, sales commission rate.

Stimulus: Administrator converts a finalized quote to a purchase order.

Response: Purchase order is sent to the external processing system. Customer will receive an email with the purchase confirmation. Sales commission is computed and recorded.

Comments: the finalization of the quote into a purchase order and interaction with an external system for processing.

#### **Use Case Description 7: Retrieve Quote for Editing**

Actors: Sales Associate

Description: Sales associates access the system to retrieve finalized quotes for editing. They can add, edit, or remove line items, change prices, or apply discounts based on customer requests or updates.

Data: Finalized quote details, line items, discounts.

Stimulus: Sales associate retrieves a finalized quote for editing.

Response: Quote is retrieved and can be edited as needed.

Comments: This use case focuses on the ability of sales associates to retrieve finalized quotes for editing purposes.

#### **Use Case Description 8: Search and View Quotes**

Actors: Admin

Description: Admin uses the administrative interface to search and view quotes based on various criteria such as status (finalized, sanctioned, ordered), date range, sales associate, and customer. This allows for efficient management and retrieval of quote information.

Data: Quote information (status, date, sales associate, customer).

Response: Quotes matching the search criteria are displayed for viewing.

Comments: This use case addresses the functionality for searching and viewing quotes based on specific criteria to facilitate effective management of quote information.