

Actor Descriptions

Actor	Description	Use Case(s)
Sale Associate	Authorizes sales associate employees responsible for generating sales and creating quotes for clients in the system.	Enter Quote Attach Note Finalize Quote
HQ Quote Employee	Able to view quote details. Responsible for making any changes to quotes before sanctioning them.	Edit Quote Finalize Quote Sanction Quote Send Quote Email Get/Search Quotes
HQ Order Employee	Able to view quote details. Responsible for turning sanctioned quotes into orders.	Get/Search Quotes Convert Quote to Order Compute Total Add Discount Get Processed Details
Admin	Responsible for managing sanctioned quotes information and managing associate records inside of the in-house management systems.	Get/Search Quotes Maintain Sales Associates View Associates Edit Associate Add Associate Remove Associate
Client	Receives final quote and order confirmation emails, authorizes plant repair services charge.	Send Sanctioned Quote Email Send Purchase Order Confirmation Email
External System	Receives purchase order and returns processing date and computed commission for sales associate.	Get Processed Details Send Purchase Email

Use Case Description

Enter / Edit / Finalizer Quote Details

Actors	Sale Associate, System
Description	The Sale Associate enters, edits, or finalizes the details of quotes from clients. Secret notes of free form text added by associates.
Data	Client name, address, and contact info. Multiple line items with free form description and price.
Stimulus	Sale Associate begins, continues, or finishes a client quote.
Response	Confirmation that current quote details have been updated.
Comments	Quote is entered into a new quote database. A client's email is attached to the quote.

Retrieve / Modify / Sanction Quotes

Actors	HQ Quote Employee, System
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Description	The HQ Quote Employee can retrieve, modify, or sanction quotes. Secret notes by associates can be seen; new notes can be added. Quotes are left as unresolved or sanctioned
Data	Line items can be added, removed, or edited. Line-item prices can be changed. Discounts can be given.
Stimulus	HQ Quote Employee looking over and finalizing a sale.
Response	Confirmation that quotes details have been updated.
Comments	

Send Quote Email

Actors	HQ Quote Employee, Client
Description	Client receives email with final quote details.
Data	Quote details for each client
Stimulus	HQ Quote employee finalizes details and sanctions client's quote.
Response	Client receives email for quotes that are confirmed to be sanctioned.
Comments	Email contains all quote data except secret notes.

Get/Search Quotes

Actors	HQ Quote Employee
Description	HQ Quote Employee looks for and gets details on a client's quote and finalizes it. Send an email to the client with final details.
Data	Quote details for a certain client.
Stimulus	HQ Quote Employee works on a client's quote to finalize it.
Response	Confirmation that quote has been sanctioned and an email has been sent to client.
Comments	

Convert Quote to Order

Actors	HQ Order Employee, Client
Description	Upon approval of a quote from Client, HQ Order Employee turns the quote into a confirmed order for plant repair services.
Data	Quote order details for certain client.
Stimulus	Approval from Client to go ahead with plant repair services.
Response	Start to compute order total to send purchase order email.
Comments	The go ahead is given outside of the scope of this system

Compute Total -> Add Discount

Actors	HQ Order Employee
Description	If applicable, HQ Order Employee adds a final discount. Then the final amount is computed.
Data	Discount given whether it's percentage or amount off. Total calculated cost for quote.

Stimulus	HQ Order Employee converts quote into order to be processed.
Response	Purchase orders are sent to the external system for processing.
Comments	External System is an actor in processing information, not the computing of the total amount for services.

Get Processed Details

Actors	HQ Order Employee, External System
Description	Processes purchase order information and answers with a processing date and commissions for sales associates.
Data	Total calculated cost for quote, processing date, and sales commission rate for the sales associate.
Stimulus	HQ Order Employee computes total for quote and sends it to external system for processing.
Response	Send purchase confirmation email to client.
Comments	The sales commission rate is then accumulated in the sales associate's record.

Send Purchase Details

Actors	HQ Order Employee, External System, Client
Description	After the order is processed with a processing date for the client and a commission rate for the associate, the external system sends an email with the purchase details to the client.
Data	Purchase order for a client.
Stimulus	The External System receives an order to be processed.
Response	An email with the purchase details, including a processing date, is sent to the client.

Comments	A commission rate is also calculated for the associate.

Maintain Sales Associates

Actors	Admin
Description	Admin manages Associate information and quote information. They can view, add, edit, or remove an Associate. They can also search, and view quotes based on status.
Data	Associate name, user id, password, accumulated commission, and address. Quotes based on (finalized, sanctioned, and ordered)
Stimulus	Admin wishes to view or change current associate records or quotes.
Response	Confirmation that changes have been saved / updated.
Comments	Quotes can be sorted based on status, date range, sales associate, and customer.

Use Case Diagram

Quote + Order Tracking Program

