

Milestone 1

Corporate Structure Requirements:

- Products are sold to customers (SA, Fact)
- Every location has an office, a warehouse, and a factory (SA, Term)
- The departments are Executive, Accounting, Assembly, Engineering, Information Technology, Inventory, Maintenance, Marketing, Payroll, Purchasing, Sales, Security, and Strategy (SA, Term)
- Each location does not necessarily have every department present (SA, Fact)
- Each department of each location has a manager (SA, Fact)
- Each Location has an individual in charge of that location (SA, Fact)
- Most Employees have a direct supervisor (SA, Fact)

Sales Requirements:

- Each order is placed, filled and shipped(SA, Fact)
- After placement, order is reviewed and either accepted or denied (SA, Fact)
- Reviewing process happens within 2 days(AA, timer)
- Customers can place orders by phone or through website(SA, Fact)
- US is divided into sales regions (SA, Term)
- Each sales region is serviced by a sales department (SA, Fact)
- There exists a region for international orders and only international orders (SA, Fact)
- International orders can only be placed online (SA, Fact)
- Orders cannot be made unless user is registered in system as a customer (SA, Fact)
- Each customer must have at least one contact person, but no more than three (SA, Fact)
- Each discount must be approved by a sales manager before being applied(SA, Fact)

Customer Relations Requirements

- Every Location has a Customer Relations group which is part of the strategy department (SA, Fact)
- Each Domestic Customer is surveyed once a year (SA, Term)
- After a survey, three scores are assigned (AA, Enabler)
- International Customers are not surveyed (SA, Term)
- Surveys are given via email (SA, Term)
- Complaints can be over the phone or via email (SA, Term)
- An Employee can suggest that a customer get a discount on their next order (SA, Fact)

Inventory Requirements:

- Each product is made up of parts (SA, Fact)
- Parts are kept in the warehouse at each location (SA, Fact)
- For each order placed, the warehouse receives a notification that lists the items and quantities of each item (SA, Fact)
- A Bill of Materials (BoM) lists the parts needed for a specific product (SA, Term)
- Each product has a BoM(SA, Fact)
- For each order, parts are collected in the warehouse and put in a container(s)(SA, Fact)
- After parts are collected, the container(s) are sent to the factory(SA, Fact)

- Whenever a part is picked to go in a container, the worker must scan the tag on the shelf and enter the quantity taken (AA, Executive)

Purchasing Requirements:

- An order cannot be fulfilled until the necessary parts are present (AA, Enabler)
- Parts are bought from manufacturers (SA, Fact)
- Parts are shipped to warehouses (SA, Fact)
- When the on-hand amount of a part is less than the reorder point, more parts are ordered (SA, Term)
- Parts are available from at least one manufacturer (SA, Fact)
- The same parts will have the same part number even if they are from different manufacturers (SA, Fact)
- Parts can be ordered at an increased price in an emergency if someone approves it (SA, Term)
- Parts can be shipped from one location to another (SA, Fact)

Assembly Requirements:

- Each time the factory receives parts, they must double check the parts with the BoM (AA, Executive)
- If all parts are present, the BoM is signed off on and product can be made (AA, Executive)
- If not all parts are present, send all parts back to warehouse to correct order (AA, Executive)
- A Routing Sheet is a list of steps of the assembly of a product (SA, term)
- A Routing Sheet also shows how much time the process should take (SA, term)
- Each product has a Routing Sheet. (SA, Fact)
- For each step the workers beginning and end time are recorded to evaluate them. (SA, Fact)
- Once order is built, its sent to shipping (AA, Executive)
- In shipping, the products are packaged and put on trucks to sent to customers (SA, Fact)
- Orders can be divided and shipped at different times (SA, Fact)
- Every order leaves the factory on a Stompers and Wombat's truck (SA, Fact)
- Orders can be taken to other shipping methods (IPS, FedEx...) if it is a better option (SA, Fact)

Accounting Requirements:

- The accounting systems are Accounts Payable, Accounts Receivable, and General Ledger (SA, Term)
- Each system has both debits and credits (SA, Term)
- An invoice is sent after the order is put on the truck (AA, Enabler)
- An invoice shows what products were shipped and the quantities of those products, the prices of those products, and the total cost (SA, Fact)
- The invoice contains Total cost = $\text{sum}(\text{product quantity} * \text{product price})$ (DA)

- If the bill is unpaid after a certain number of days, the customer is called and a late fee is charged (AA, Timer)
- A customer may have a discount (SA, Fact)
- A discount may be permanent or single use (SA, Term)
- Each location may charge sales tax (SA, Term)
- Some customers don't pay sales tax (SA, Term)
- Customers may be charged shipping (SA, Term)

Payroll Requirements:

- Payroll is done within the company, no third party is used (SA, Fact)
- Salespeople receive a salary as well as commission (SA, Term)
- Different salespeople have different commission percentages(SA, Term)
- Commissions are a month in arrears(SA, Term)
- Some are employees paid by the hour(SA, Fact)
- How someone is paid is based off of job title, not the individual (SA, Fact)
- Hourly employees have an expected amount of hours they should work in a week(SA, Term)
- Hourly employees are eligible for overtime and a shift-differential (SA, Term)
- Overtime occurs when an employee works 40+hours in a week (SA, Term)
- A shift differential occurs when an employee works 3rd shift(SA, Term)
- Employees who are not salespeople or hourly workers are paid a salary (SA, Term)
- Salary Employees get the same pay at the end of each month (SA, Fact)
- All employees are eligible for benefits(SA, Fact)
- Benefits include Health insurance, dental, vision, short and long term disability, life insurance, 401k (SA, term)
- S&W needs employee's marital status, dependents, exemptions claimed and extra withholding(SA, Fact)

SoVanna Corlene - Office Manager

Location Creation:

Category: Location

Location Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Location Manager: _____

Key

Red: displayed
or already known

Green: Employee
input

Blue: Interactive
Button

Department Creation:

Category: Department

Type: _____

Manager: _____

Location: _____

Jim Halpert: Regional Sales Manager

Order Entry:

Category: Order

Order Type: Phone

Location of Sale: Tampa Bay

Customer Name: _____

Customer ID: _____

Item No.	_____	Quantity	_____	Price	_____
----------	-------	----------	-------	-------	-------

Item No.	_____	Quantity	_____	Price	_____
----------	-------	----------	-------	-------	-------

Item No.	_____	Quantity	_____	Price	_____
----------	-------	----------	-------	-------	-------

Item No.	_____	Quantity	_____	Price	_____
----------	-------	----------	-------	-------	-------

Total Price:

Add Item

Discount % _____

Discounted Price _____

Haley Pritchard - Customer Relations Specialist

Complaint Filings:

Category: Complaint

Customer Name: _____

Customer ID: _____

Complaint Notes:

Survey Records:

Category: Survey Response

Customer Name: _____

Customer ID: _____

Sales Score: _____

Quality Score: _____

Logistics Score: _____

Darryll Philbin - Warehouse Supervisor

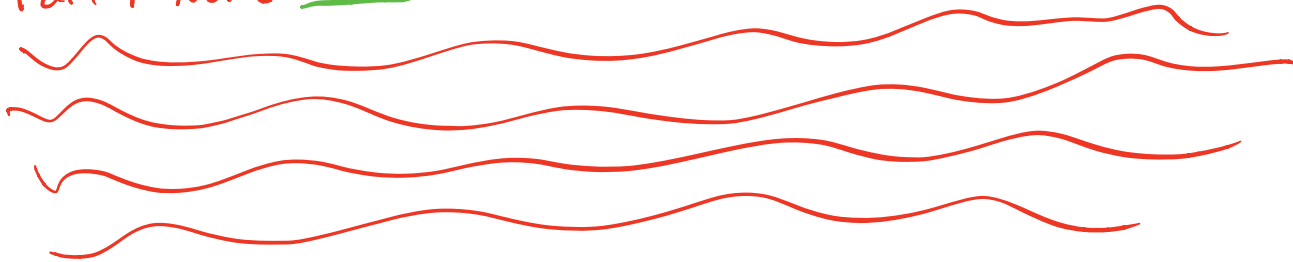
Category: Inventory Report

Start Date: _____

End Date: _____

Location: Durham, NC

Part 1 Name: _____ Starting Inventory: _____ Ending Inventory: _____



Katie Bell - Purchasing Agent

Inventory Order:

Department Name: _____

Part Name: _____

Part ID: _____ Quantity: _____ Price: _____

Total Price: _____

Rosie Riveter - Lead Assembly Specialist

Category: Assembly Record

Employee ID: _____

Product ID: _____

Step: _____ Start Time: _____ End Time: _____

Kevin Malone - Accounting

Category: Invoice

Shipping Address: _____

City: _____ State: _____ Zip: _____

Item 1: _____ price: _____ quantity: _____ total: _____

April Ludgate: Payroll Specialist

Category: Payroll

Employee Name: _____

Employee ID: _____

Type: Commission, hourly, or Salary

Hourly Wage: _____ Hours Worked: _____

Overtime Hours Worked: _____

Overtime Hourly Pay: _____

Total Pay: _____

Salary: _____

Monthly Salary: _____

Commission %: _____