
Use Cases

for

< Sales Team for CRM>

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Use Case List

Primary Actor	Use Cases
Sales worker	Manage account: create account, modify account, create account person, modify account person, create location, modify location
	Manage contract: create contract, modify contract
	Manage newsletter: send newsletter, create newsletter, modify newsletter
	Manage product: input product, modify product
	Manage service: input service, modify service
Sales manager	Manage newsletter template: create template, modify template, delete template
	Manage account's contract: set contract level
	Communication

Use Case Template

001-manage account

Use Case ID:	001		
Use Case Name:	manage account		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/27/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	Manage account's creation and modification, account person creation, account person modification, location creation, location modification
Trigger:	Customer call
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new account for customer; 2. Or modify an existing account for customer; 3. Create a new account person for customer; 4. Or modify an existing account person for customer; 5. Or create a new location account person for customer; 6. Or modify location for an existing account person.
Normal Flow:	1. 001.0-open account manage page 2. 001.0-The page will list current account and show [create account], [create account person], [create location] button
Alternative Flows:	
Exceptions:	Anticipated errors: Unanticipated errors: 1. 001.0.E.1 - network disconnection, system will respond to an alert message and wait for the network recovery 2. 001.0.E.2 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	1. create account 2. modify account 3. create account person 4. modify account person 5. create location 6. modify location
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	The use case will be executed per request of account's creation modification or account person creation or account person modification or location creation or location modification
Special Requirements:	Search to see if there is the customer account in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

002-create account

Use Case ID:	002		
Use Case Name:	create account		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/27/2011	Date Last Updated:	03/27/2011

Actors:	sales worker
Description:	Manage account/lead/customer's creation
Trigger:	New customer request
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new account for customer
Normal Flow:	1. 002.0-click [create account] button to start input 2. 002.0-input customer information, error message will be raised if anything wrong happens 3. 002.0-click ok button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	1. 002.1-click create account menu item
Exceptions:	Anticipated errors: 1. 002.0.E.1 - Zipcode not in the list, system will respond to an alert message and guide sales worker to zipcode input 2. 002.0.E.2 - email input error, system will respond to an alert message and guide sales worker to email input 3. 002.0.E.3 - date input error, system will respond to an alert message and guide sales worker to date input Unanticipated errors: 4. 002.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 002.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	The use case will be executed once a new customer starts a call to CCI .
Special Requirements:	Search to see if the customer has already been in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

003-modify account

Use Case ID:	003		
Use Case Name:	modify account		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/27/2011	Date Last Updated:	03/27/2011

Actors:	sales worker
Description:	Manage account's modification
Trigger:	Existing customer for customer call
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Update information for customer
Normal Flow:	<ol style="list-style-type: none"> 1. 003.0-double click an existing customer to open an page listing information 2. 003.0-input corresponding information as customer required, error message will be raised if anything wrong happens 3. 003.0-click [ok] button to finish the input, error message will be raised if anything wrong happens; click [cancel] button to cancel the input
Alternative Flows:	1. 003.1-click modify account menu item
Exceptions:	<p>Anticipated errors:</p> <ol style="list-style-type: none"> 1. 003.0.E.1 - zipcode not in the list, system will respond to an alert message and guide sales worker to zipcode input 2. 003.0.E.2 - email input error, system will respond to an alert message and guide sales worker to email input 3. 003.0.E.3 - date input error, system will respond to an alert message and guide sales worker to date input <p>Unanticipated errors:</p> <ol style="list-style-type: none"> 4. 003.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 003.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	The use case will be executed once a new customer starts a call to CCI .
Special Requirements:	Search to see if the customer has already been in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

004-create account person

Use Case ID:	004		
Use Case Name:	create account person		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/29/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	Manage account person's creation
Trigger:	New customer person request
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new account person for customer
Normal Flow:	4. 004.0-click [create account person] button to start input 5. 004.0-input person information, error message will be raised if anything wrong happens 6. 004.0-click ok button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	
Exceptions:	Anticipated errors: 1. 004.0.E.1 - Zipcode not in the list, system will respond to an alert message and guide sales worker to zipcode input 2. 004.0.E.2 - email input error, system will respond to an alert message and guide sales worker to email input 3. 004.0.E.3 - date input error, system will respond to an alert message and guide sales worker to date input Unanticipated errors: 4. 004.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 004.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	create location
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	When a customer want to assign person into his account, sales worker needs to check if the person is new or existing one. If new one, start the use case.
Special Requirements:	Search to see if there is the person in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

005-modify account person

Use Case ID:	005		
Use Case Name:	modify account person		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/29/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	Manage account person's modification
Trigger:	customer person's modification request
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Modify the information for account person
Normal Flow:	<ol style="list-style-type: none"> 005.0-click [modify account person] button to start input 005.0-input/update person information, error message will be raised if anything wrong happens 005.0-click ok button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	
Exceptions:	<p>Anticipated errors:</p> <ol style="list-style-type: none"> 005.0.E.1 - Zipcode not in the list, system will respond to an alert message and guide sales worker to zipcode input 005.0.E.2 - email input error, system will respond to an alert message and guide sales worker to email input 005.0.E.3 - date input error, system will respond to an alert message and guide sales worker to date input <p>Unanticipated errors:</p> <ol style="list-style-type: none"> 005.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 005.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	Modify location
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	When a customer want to assign person into his account, sales worker needs to check if the person is new or existing one. If existing one, start the use case.
Special Requirements:	Search to see if there is the person in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

006-create location

Use Case ID:	006		
Use Case Name:	create location		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/29/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	Create account person's location
Trigger:	New customer person request
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new location for account person
Normal Flow:	1. 006.0-click [create location] button to start input 2. 006.0-input person information, error message will be raised if anything wrong happens 3. 006.0-click ok button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	
Exceptions:	Anticipated errors: 1. 006.0.E.1 - Zipcode not in the list, system will respond to an alert message and guide sales worker to zipcode input 2. 006.0.E.2 – Too long location input, system will respond to an alert message and guide sales worker to input Unanticipated errors: 3. 006.0.E.3 - network disconnection, system will respond to an alert message and wait for the network recovery 4. 006.0.E.4 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	When a customer wants to create/modify person's location, the use case will be triggered.
Special Requirements:	Search to see if there is the location in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

007-modify location

Use Case ID:	007		
Use Case Name:	modify location		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/29/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	Modify account person's location
Trigger:	Existing customer person request
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Modify a new location for account person
Normal Flow:	4. 007.0-click [modify location] button to start input 5. 007.0-input account and person's name and then modify location information, error message will be raised if anything wrong happens 6. 007.0-click ok button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	
Exceptions:	Anticipated errors: 1. 007.0.E.1 - Zipcode not in the list, system will respond to an alert message and guide sales worker to zipcode input 2. 007.0.E.2 – Too long location input, system will respond to an alert message and guide sales worker to input Unanticipated errors: 3. 007.0.E.3 - network disconnection, system will respond to an alert message and wait for the network recovery 4. 007.0.E.4 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	When an existing customer wants to modify person's location, the use case will be triggered.
Special Requirements:	Search to see if there is the location in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

008-manage contract

Use Case ID:	008		
Use Case Name:	manage contract		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage contract's creation and modification
Trigger:	Customer call or customer's request via fax/email
Preconditions:	1. New customer or existing ones' request
Postconditions:	1. Create a new contract for customer; 2. Or modify an existing contract for customer.
Normal Flow:	1. 008.0-open contract manage page 2. 008.0-The page will list current contract and show [create contract] button
Alternative Flows:	
Exceptions:	Anticipated errors: Unanticipated errors: 3. 008.0.E.1 - network disconnection, system will respond to an alert message and wait for the network recovery 4. 008.0.E.2 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	7. create contract 8. modify contract
Priority:	High (to be decided)
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	The use case will be executed when a new customer or an existing customer send an request via call or fax/email to CCI.
Special Requirements:	Search to see if there is a contract for the existing customer.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

009-create contract

Use Case ID:	009		
Use Case Name:	create contract		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage contract's creation
Trigger:	Customer call or customer's request via fax/email
Preconditions:	1. New customer or no corresponding contract information for

	existing customer in system
Postconditions:	1. Create a new contract for customer
Normal Flow:	<ol style="list-style-type: none"> 009.0-click [create contract] button to start input 009.0-input contract information, error message will be raised if anything wrong happens 009.0-click [ok] button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	1. 009.1-click create contract menu item
Exceptions:	<p>Anticipated errors:</p> <ol style="list-style-type: none"> 009.0.E.1 – Contract Name is required, system will respond to an alert message and guide sales worker to Contract Name input 009.0.E.2 - Account Name is required, system will respond to an alert message and guide sales worker to Account Name input 009.0.E.3 – Start Date is required, system will respond to an alert message and guide sales worker to Start Date input 009.0.E.4 – End Date is required, system will respond to an alert message and guide sales worker to End Date input <p>Unanticipated errors:</p> <ol style="list-style-type: none"> 009.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 009.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	When CCI signs a new account, a new contract will be created.
Special Requirements:	Search to see if the customer has already been in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

010-modify contract

Use Case ID:	010		
Use Case Name:	modify contract		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage contract's modification
Trigger:	Existing customer call or request via fax/email to modify
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Update contract information as request

Normal Flow:	<ol style="list-style-type: none"> 010.0-double click an existing customer's contract to open contract information 010.0-input corresponding information as customer required, error message will be raised if anything wrong happens 010.0-click [ok] button to finish the input/update, error message will be raised if anything wrong happens; click [cancel] button to cancel the input
Alternative Flows:	1. 010.1-click modify contract menu item
Exceptions:	<p>Anticipated errors:</p> <ol style="list-style-type: none"> 010.0.E.1 – Contract Name is incorrect, system will respond to an alert message and guide sales worker to Contract Name input 010.0.E.2 - Account Name is incorrect, system will respond to an alert message and guide sales worker to Account Name input 010.0.E.3 – Start Date is incorrect, system will respond to an alert message and guide sales worker to Start Date input 010.0.E.4 – End Date is incorrect, system will respond to an alert message and guide sales worker to End Date input <p>Unanticipated errors:</p> <ol style="list-style-type: none"> 010.0.E.5 - network disconnection, system will respond to an alert message and wait for the network recovery 010.0.E.6 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	Need to validate customer's information before modification and sales worker needs to have permission to perform the use case
Special Requirements:	Search to see if the customer's contract has already been in the system.
Assumptions:	Request from customer call, fax or email can trigger the modification
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development; Diptanu and Anbing will test and assure quality.

011-modify product

Use Case ID:	011		
Use Case Name:	manage product		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage product's creation and modification
Trigger:	Request or ticket from Market Department

Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new product as the request; 2. Or modify existing product information as the request.
Normal Flow:	1. 011.0-open manage product page 2. 011.0-The page will list current product and show [create] button
Alternative Flows:	
Exceptions:	Anticipated errors: Unanticipated errors: 1. 011.0.E.1 - network disconnection, system will respond to an alert message and wait for the network recovery 2. 011.0.E.2 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	1. create product 2. modify product
Priority:	High
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	When CCI sign a contract with product provider, new products will be created; Or any product information modification or production support stops also trigger the case.
Special Requirements:	Search to see if there is a product for the request/ticket.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

012-create product

Use Case ID:	012		
Use Case Name:	create product		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage product's creation
Trigger:	Request or ticket from Market Department
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new product as the request;
Normal Flow:	1. 012.0-click [create] button to start input 2. 012.0-input product information, error message will be raised if anything wrong happens 3. 012.0-click [ok] button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	1. 012.1-click create product from menu item
Exceptions:	Anticipated errors: 1. 012.0.E.1 – Product Name is required, system will respond to

	<p>an alert message and guide sales worker to the input</p> <ol style="list-style-type: none"> 012.0.E.2 - Product Code is required, system will respond to an alert message and guide sales worker to Account Name input 012.0.E.3 – Product Name information conflict 012.0.E.4 – Product Code information conflict <p>Unanticipated errors:</p> <ol style="list-style-type: none"> 012.0.E.5 - network disconnection, system will respond to an alert message and wait for the network recovery 012.0.E.6 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	When CCI sign a contract with product provider, new products will be created.
Special Requirements:	Search to see if the product has already been in the system.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

013-modify product

Use Case ID:	013		
Use Case Name:	modify product		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage product's modification
Trigger:	Request or ticket from Market Department
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	2. Modify product information as the request;
Normal Flow:	<ol style="list-style-type: none"> 013.0-search the production to be modified and double click to open information 013.0-input/update product information, error message will be raised if anything wrong happens 013.0-click [ok] button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	1. 013.1-right click the product to modify
Exceptions:	<p>Anticipated errors:</p> <ol style="list-style-type: none"> 013.0.E.1 – Product Name is required, system will respond to an alert message and guide sales worker to the input 013.0.E.2 - Product Code is required, system will respond to an alert message and guide sales worker to the input 013.0.E.3 – Product Name information conflict

	4. 013.0.E.4 – Product Code information conflict Unanticipated errors: 5. 013.0.E.5 - network disconnection, system will respond to an alert message and wait for the network recovery 6. 013.0.E.6 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	When CCI sign a contract with product provider, new products will be created.
Special Requirements:	Any tickets for product information modification or production support stops will trigger the case.
Assumptions:	The sales worker should have permission to modify product.
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

014-mange service

Use Case ID:	014		
Use Case Name:	manage service		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage service's creation and modification
Trigger:	Request from customer
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new service as the request; 2. Or modify existing service information as the request.
Normal Flow:	1. 014.0-open manage service page 2. 014.0-The page will list current service and show [create] button
Alternative Flows:	1. directly click [manage service] menu item/button on bar
Exceptions:	Anticipated errors: Unanticipated errors: 1. 014.0.E.1 - network disconnection, system will respond to an alert message and wait for the network recovery 2. 014.0.E.2 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	3. create a service 4. modify a service's information
Priority:	High
Frequency of Use:	0-100 (depends on request and business)

Business Rules:	When customer request service via call, fax or email, the use case will be triggered.
Special Requirements:	Search to see current services for customer.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

015-create service

Use Case ID:	015		
Use Case Name:	create service		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage service's creation
Trigger:	Request from customer
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a new service as the request
Normal Flow:	1. 015.0-click [create] button to start input 2. 015.0-input service information, error message will be raised if anything wrong happens 3. 015.0-click [ok] button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	1. directly click [new service] menu item
Exceptions:	Anticipated errors: 1. 015.0.E.1 – Account Name is required, system will respond to an alert message and guide sales worker to Contract Name input 2. 015.0.E.2 – Service Status should be “new” otherwise system will respond to an alert message and guide sales worker to select status from drop list 3. 015.0.E.3 – Priority is required otherwise system will respond to an alert message and guide sales worker to select priority from drop list 4. 015.0.E.4 – Due Date is required otherwise system will respond to an alert message and guide sales worker to Due Date input 5. 015.0.E.5 – Due Time is required, system will respond to an alert message and guide sales worker to Due Time input 6. 015.0.E.6 – Assign to is required otherwise system will respond to an alert message and guide sales worker to “assign to” input Unanticipated errors: 7. 015.0.E.7 - network disconnection, system will respond to an alert message and wait for the network recovery 8. 015.0.E.8 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	1. create a service

Priority:	High
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	When customer request service via call, fax or email, the use case will be triggered.
Special Requirements:	Search to see current services for customer to check if there are same service
Assumptions:	Sales worker has proper permission to create service
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

016-modify service

Use Case ID:	016		
Use Case Name:	modify service		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	Manage service's modification/stop
Trigger:	Request from customer
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	2. Modify a new service as the request
Normal Flow:	1. 016.0-click [modify] button to start input/update 2. 016.0-input service information, error message will be raised if anything wrong happens 3. 016.0-click [ok] button to finish the input, error message will be raised if anything wrong happens
Alternative Flows:	1. 016.1-directly click [modify service] menu item
Exceptions:	Anticipated errors: 1. 016.0.E.1 – Account Name is required, system will respond to an alert message and guide sales worker to Contract Name input 2. 016.0.E.2 – Service Status cannot be “new” otherwise system will respond to an alert message and guide sales worker to select status from drop list 3. 016.0.E.3 – Priority is required otherwise system will respond to an alert message and guide sales worker to select priority from drop list 4. 016.0.E.4 – Due Date is required otherwise system will respond to an alert message and guide sales worker to Due Date input 5. 016.0.E.5 – Due Time is required, system will respond to an alert message and guide sales worker to Due Time input 6. 016.0.E.6 – Assign to is required otherwise system will respond to an alert message and guide sales worker to “assign to” input Unanticipated errors: 7. 016.0.E.7 - network disconnection, system will respond to an

	alert message and wait for the network recovery 8. 016.0.E.8 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	2. create a service
Priority:	High
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	When customer request service via call, fax or email, the use case will be triggered.
Special Requirements:	Search to see the status of the service to make sure if it can be modified
Assumptions:	Sales worker has proper permission to modify service
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

017-mange newsletter

Use Case ID:	017		
Use Case Name:	manage newsletter		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/29/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	Manage newsletter's creation, modification and sending
Trigger:	1. CCI's policy changed 2. Show customers new promotions, offers and etc.
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create newsletter 2. Modify newsletter 3. Send newsletter
Normal Flow:	1. 017.0-open manage newsletter page 2. 017.0-The page will list current newsletter and show [create newsletter], [send newsletter] button
Alternative Flows:	1. directly click [create newsletter] menu item/button on bar
Exceptions:	Anticipated errors: Unanticipated errors: 1. 017.0.E.1 - network disconnection, system will respond to an alert message and wait for the network recovery 2. 017.0.E.2 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	1. create a newsletter 2. modify a newsletter's information 3. send a newsletter to customers
Priority:	High
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	CCI should create newsletters when request from market or other

	internal departments; CCI should modify newsletters when request from market or other internal departments; CCI should regularly send newsletters to customers to show promotions, offers, big deals;
Special Requirements:	Search to see if there are corresponding newsletters and effective promotion period; Search to see if corresponding newsletters have been already sent.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

018-create newsletter

Use Case ID:	018		
Use Case Name:	create newsletter		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/28/2011	Date Last Updated:	03/28/2011

Actors:	sales worker
Description:	newsletter's creation
Trigger:	Request from internal departments
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Create a newsletter as the request
Normal Flow:	<ol style="list-style-type: none"> 1. 018.0-click [create newsletter] button to start input 2. 018.0-input newsletter information and involve corresponding promotions, error message will be raised if anything wrong happens 3. 018.0-click [ok] button to finish the creation, error message will be raised if anything wrong happens
Alternative Flows:	1. directly click [new newsletter] menu item
Exceptions:	<p>Anticipated errors:</p> <ol style="list-style-type: none"> 1. 018.0.E.1 – At least one promotion should be included into the newsletter, system will respond to an alert message and guide sales worker to promotion select 2. 018.0.E.2 – Newsletter Status should be “new” otherwise system will respond to an alert message and guide sales worker to select status from drop list 3. 018.0.E.3 – At least one customer should be included into the newsletter, system will respond to an alert message and guide sales worker to customer 4. 018.0.E.4 – Due Date is required otherwise system will respond to an alert message and guide sales worker to Due Date input 5. 018.0.E.5 – Due Time is required, system will respond to an alert message and guide sales worker to Due Time input <p>Unanticipated errors:</p> <ol style="list-style-type: none"> 6. 018.0.E.7 - network disconnection, system will respond to an

	alert message and wait for the network recovery 7. 018.0.E.8 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	3. create a newsletter
Priority:	High
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	When a new promotion created, a newsletter could be considered; When existing promotion changed, a newsletter could be considered;
Special Requirements:	Search to see current newsletters to check if there are same newsletter and effective period
Assumptions:	Sales worker has proper permission to create newsletter
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

019-modify newsletter

Use Case ID:	019		
Use Case Name:	modify newsletter		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/29/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	newsletter's modification
Trigger:	Request from internal departments
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Modify an existing newsletter as the request
Normal Flow:	1. 019.0-click [modify newsletter] button to start input 2. 019.0-input/update newsletter information and involve/change corresponding promotions, error message will be raised if anything wrong happens 3. 019.0-click [ok] button to finish the modification, error message will be raised if anything wrong happens
Alternative Flows:	1. directly click [modify newsletter] menu item
Exceptions:	Anticipated errors: 1. 019.0.E.1 – At least one promotion should be included into the newsletter, system will respond to an alert message and guide sales worker to promotion select 2. 019.0.E.2 – Newsletter Status should be “in progress” otherwise system will respond to an alert message and guide sales worker to select status from drop list 3. 019.0.E.3 – At least one customer should be included into the newsletter, system will respond to an alert message and guide sales worker to customer 4. 019.0.E.4 – Due Date is required otherwise system will respond to an alert message and guide sales worker to Due Date input

	5. 019.0.E.5 – Due Time is required, system will respond to an alert message and guide sales worker to Due Time input Unanticipated errors: 6. 019.0.E.7 - network disconnection, system will respond to an alert message and wait for the network recovery 7. 019.0.E.8 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	1. modification a newsletter
Priority:	High
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	Before sending a newsletter, modification could be considered when a new promotion created; When existing promotion changed, a newsletter could be considered;
Special Requirements:	Search to see current newsletters to check if there are same newsletter and effective period
Assumptions:	Sales worker has proper permission to modify newsletter
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

020-send newsletter

Use Case ID:	019		
Use Case Name:	send newsletter		
Created By:	Anbing Xue	Last Updated By:	Anbing Xue
Date Created:	03/29/2011	Date Last Updated:	03/29/2011

Actors:	sales worker
Description:	newsletter's sending
Trigger:	Request from internal departments
Preconditions:	1. Sales worker should be logged in and should have proper permissions.
Postconditions:	1. Send newsletter to customers
Normal Flow:	1. 019.0-choose newsletters to sent 2. 019.0-choose customers to be involved in the newsletter sending list; 3. 019.0-send newsletters, alert messages could be raised if there is something incorrect for customers or newsletters, such as customer has been stopped or newsletter has been expired.
Alternative Flows:	
Exceptions:	Anticipated errors: 1. 019.0.E.1 – Customer chose has been stopped, system will mark the customers with problem 2. 019.0.E.2 – Newsletter has been expired, system will mark the newsletters with problem
Includes:	

Priority:	High
Frequency of Use:	0-100 (depends on request and business)
Business Rules:	Regularly, CCI will send newsletters to customers to show promotions, offers or deals and etc.
Special Requirements:	Search to see current sent newsletters to check if there are same newsletter and to make sure effective period
Assumptions:	Sales worker has proper permission to send newsletter
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

030-Manage Newsletter Template

Use Case ID:	030		
Use Case Name:	Manage Newsletter Template		
Created By:	Diptanu Das	Last Updated By:	Diptanu Das
Date Created:	3/28/2011	Date Last Updated:	3/29/2011

Actors:	Sales Manager
Description:	Manage Newsletter Template
Trigger:	<ol style="list-style-type: none"> 1. To place promotions, offers and discount in the template 2. CCI company policy changes
Preconditions:	1. Proper sales manager should be logged in and should have proper permission.
Postconditions:	1. Sales Manager can create, modify and delete the template.
Normal Flow:	<ol style="list-style-type: none"> 1. 030.0 –Click on the template button. 2. 030.0 - Select the required template to be modified. Make the changes. 3. 030.0 -modify the information. 4. 030.0 -click [ok] button to finish the input/update, error message will be raised if anything wrong happens; click [cancel] button to cancel the input
Alternative Flows:	
Exceptions:	<p>Anticipated:</p> <ol style="list-style-type: none"> 1. 030.0.E.1- Error message appears if no start date and end date for the template is provided. 2. 030.0.E.2 – Error message appears if no promotion is provided in the template. 3. 030.0.E.3- Error message comes if customer type is mentioned in the template. <p>Unanticipated:</p> <ol style="list-style-type: none"> 4. 030.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 030.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery 6. 030.0.E.6 - Power Failure- Database will roll back if anything updated at that moment.
Includes:	Create template, modify template, delete template
Priority:	High
Frequency of Use:	0-100(depends on sales)
Business Rules:	Newsletter will be provided to customer having an account depending upon the contract level or product purchased.
Special Requirements:	
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

031-Create Template

Use Case ID:	031		
Use Case Name:	Create Template		
Created By:	Diptanu Das	Last Updated By:	Diptanu Das
Date Created:	3/29/2011	Date Last Updated:	3/29/2011

Actors:	Sales Manager
Description:	Create the newsletter template
Trigger:	<ol style="list-style-type: none"> 1. To place promotions, offers and discount in the template 2. CCI company Policy changes
Preconditions:	1. Proper sales manager should be logged in and should have proper permission.
Postconditions:	1. A newsletter template is created based on the promotion requirements.
Normal Flow:	<ol style="list-style-type: none"> 1. 031.0 –Click on the create template button. 2. 031.0 – Include the information needed to create the template. . 3. 031.0 - Click [Ok] button to finish the input template, error message will be raised if anything wrong happens; click [cancel] button to cancel the input
Alternative Flows:	
Exceptions:	<p>Anticipated:</p> <ol style="list-style-type: none"> 1. 031.0.E.1- Error message appears if no start date and end date for the template is provided. 2. 031.0.E.2 – Error message appears if no promotion is provided in the template. 3. 031.0.E.3- Error message comes if customer type is mentioned in the template. <p>Unanticipated:</p> <ol style="list-style-type: none"> 4. 031.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 031.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery. 6. 031.0.E.6 - Power Failure- Database will roll back if anything updated at that moment.
Includes:	
Priority:	High
Frequency of Use:	0-100(depends on sales)
Business Rules:	Newsletter will be provided to customer having an account depending upon the contract level or product purchased.
Special Requirements:	Search to see if the template is already created.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

032-Modify Template

Use Case ID:	032		
Use Case Name:	Modify Template		
Created By:	Diptan u Das	Last Updated By:	Diptanu Das
Date Created:	3/29/2011	Date Last Updated:	3/29/2011

Actors:	Sales Manager
Description:	Modify the newsletter template
Trigger:	<ol style="list-style-type: none"> 1. To place promotions, offers and discount in the template 2. Company Policy changes
Preconditions:	1 Proper sales manager should be logged in and should have proper permission.
Postconditions:	1. A newsletter template is created based on the promotion requirements.
Normal Flow:	<ol style="list-style-type: none"> 1. 032.0 –Click on the template button. It will show all the existing templates. 2. 032.0 – Select the required template to be modified. 3. 032.0 - Click on modify template. 4. 032.0 – Make the required changes. 5. 032.0 - Click [Ok] button to finish the input template, error message will be raised if anything wrong happens; click [cancel] button to cancel the input
Alternative Flows:	
Exceptions:	<p>Anticipated:</p> <ol style="list-style-type: none"> 1. 032.0.E.1- Error message appears if no start date and end date for the template is provided. 2. 032.0.E.2 – Error message appears if no promotion is provided in the template. 3. 032.0.E.3- Error message comes if customer type is mentioned in the template. <p>Unanticipated:</p> <ol style="list-style-type: none"> 4. 032.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 032.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery. 6. 032.0.E.6 - Power Failure- Database will roll back if anything updated at that moment.
Includes:	
Priority:	High
Frequency of Use:	0-100(depends on sales)
Business Rules:	Newsletter will be provided to customer having an account depending upon the contract level or product purchased.
Special Requirements:	Search to see if the template is already existing.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

033-Delete Template

Use Case ID:	033		
Use Case Name:	Delete Template		
Created By:	Diptanu Das	Last Updated By:	Diptanu Das
Date Created:	3/29/2011	Date Last Updated:	3/29/2011

Actors:	Sales Manager
Description:	Delete the template
Trigger:	1. Expiration of the promotion suitable for that template. 2. Company Policy Changes
Preconditions:	1. Proper sales manager should be logged in and should have proper permission. 2. Newsletter template is existed in the system.
Postconditions:	1. Deletion of the template.
Normal Flow:	1. 033.0 –Click on the template button. It will show all the existing templates. 2. 033.0 – Select the required template to be deleted. 3. 033.0 - Click on [delete] button to delete template. 4. 033.0 – Warning message comes to assure if the file needs to be deleted. 5. 033.0 - Click [Ok] button to finish the input template, error message will be raised if anything wrong happens; click [cancel] button to cancel the input
Alternative Flows:	
Exceptions:	Anticipated: 1. 033.0.E.1 – Error message comes, if the file to be deleted is not the correct one. 2. 033.0.E.2 – Error message comes in if the the changes are not compatible with the file. Unanticipated: 3. 033.0.E.3 - network disconnection, system will respond to an alert message and wait for the network recovery 4. 033.0.E.4 - database disconnection, system will respond to an alert message and wait for the database recovery. 5. 033.0.E.5 - Power Failure- Database will roll back if anything updated at that moment.
Includes:	
Priority:	High
Frequency of Use:	0-100(depends on sales)
Business Rules:	Newsletter will be provided to customer having an account depending upon the contract level or product purchased.
Special Requirements:	Search to see if the file to be deleted is existing or not.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

034-Communication

Use Case ID:	034		
Use Case Name:	Communication		
Created By:	Diptanu Das	Last Updated By:	Diptanu Das
Date Created:	3/29/2011	Date Last Updated:	3/29/2011

Actors:	Sales Worker and Sales Manager
Description:	<ol style="list-style-type: none"> 1. Communication between sales worker and customer 2. Communication between sales manager and customer
Trigger:	<ol style="list-style-type: none"> 1. Follow up with lead or customer. 2. Offer promotions, discounts etc. 3. Problem or service provided to customer
Preconditions:	<ol style="list-style-type: none"> 1. Proper sales worker should be logged in and should have proper permission. 2. Customer or Lead account is created
Postconditions:	<ol style="list-style-type: none"> 1. Communication is recorded
Normal Flow:	<ol style="list-style-type: none"> 1. 034.0 –Click on the account. It will show all the information related to the account. 2. 034.0 – Select the account. 3. 034.0 – Record the information about the communication 4. 034.0 - Click [Ok] button to finish the input information, error message will be raised if anything wrong happens; click [cancel] button to cancel the input
Alternative Flows:	
Exceptions:	<p>Anticipated:</p> <ol style="list-style-type: none"> 1. 034.0.E.1 – Error message comes, if the information is more then the specified length 2. 034.0.E.2 – Error message comes, if date of the information is not mentioned 3. 034.0.E.3 – Error message comes, if the customer account information is not mentioned properly. <p>Unanticipated:</p> <ol style="list-style-type: none"> 4. 034.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 034.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery. 6. 034.0.E.6 - Power Failure- Database will roll back if anything updated at that moment.
Includes:	
Priority:	High
Frequency of Use:	0-100(depends on sales)
Business Rules:	
Special Requirements:	Search if the communication is already recorded with the customer.
Assumptions:	
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

035-Manage Account's Contract

Use Case ID:	035		
Use Case Name:	Manage Account's Contract		
Created By:	Diptanu Das	Last Updated By:	Diptanu Das
Date Created:	3/28/2011	Date Last Updated:	3/28/2011

Actors:	Sales Manager
Description:	Manage Account's Contract Two types of Contract: 1. Service Contract (Levels of services provided by CCI to customer as per the membership taken customer. Such as Gold customer, Silver Customer and Regular Customer.) 2. Product Contract (Products purchased from CCI)
Trigger:	1. As soon as customer account is created, level of service contract is assigned(gold, silver, regular) 2. If an existing lead account become customer , The lead account needs to be modified to associate the corresponding contract. 3. If an existing account needs to be upgraded to a new contract.
Preconditions:	1. Account is already created. 2. Contract is already created.
Postconditions:	1. Association between account and contract is formed.
Normal Flow:	1. 035.0 Search the account . 2. 035.0 select the desired account. 3. 035.0 Click on associate contract button.
Alternative Flows:	1. Create a new account 2. Click on associate contract button.
Exceptions:	Anticipated errors: 1. 035.0.E.1 - email input error, system will respond to an alert message and guide sales worker to email input 2. 035.0.E.2 - date input error, system will respond to an alert message and guide sales worker to date input Unanticipated errors: 3. 035.0.E.3- network disconnection, system will respond to an alert message and wait for the network recovery 4. 035.0.E.4 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100(depends on contract)
Business Rules:	1. Service levels are provided to the customer based on their contract. 2. Time or Priority of the service is based on the customer's contract. 3. Customer is charged based on their contract and services.
Special Requirements:	Customer can be upgraded to a higher contract level. (customer

	changing contract from silver to gold membership or from 1 year to 2 year contract.)
Assumptions:	Customer cannot degrade their contract level before the completion of the services.
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality.

036-Set Contract Level

Use Case ID:	036		
Use Case Name:	Set Contract Level		
Created By:	Diptanu Das	Last Updated By:	Diptanu Das
Date Created:	3/28/2011	Date Last Updated:	3/28/2011

Actors:	Sales Manager
Description:	Set Contract Level with the customer
Trigger:	1. Contract needs to be modified for the account.
Preconditions:	1. Customer is already registered.
Postconditions:	1. An association of contract and account should be created.
Normal Flow:	1. 036.0 - Press on create account button. 2. 036.0 - Click on the type of contract level. (whether it is gold membership, silver membership or regular membership). 3. 036.0-Input the services that can will be provided to the customer as per the membership. 4. 036.0 - Submit the information.
Alternative Flows:	1. 036.1 - Search for an account. 2. 036.2 - Modify account. 3. 036.3 - Click on contract to be associated. 4. 036.4 - Submit the information
Exceptions:	Anticipated errors: 1. 036.0.E.1 - zipcode not in the list, system will respond to an alert message and guide sales worker to zipcode input 2. 036.0.E.2 - email input error, system will respond to an alert message and guide sales worker to email input 3. 036.0.E.3 - date input error, system will respond to an alert message and guide sales worker to date input Unanticipated errors: 4. 036.0.E.4 - network disconnection, system will respond to an alert message and wait for the network recovery 5. 036.0.E.5 - database disconnection, system will respond to an alert message and wait for the database recovery
Includes:	
Priority:	High
Frequency of Use:	0-100 (depends on sales)
Business Rules:	1. Service levels are provided to the customer based on their contract. 2. Time or Priority of the service is based on the customer's

	contract. 3. Customer is charged based on their contract and services.
Special Requirements:	Contract can be upgraded.
Assumptions:	Customer cannot degrade their contract level before the completion of the services.
Notes and Issues:	Tianyou and Varun will be responsible for UI and Flex development, Diptanu and Anbing will test and assure quality

Revision History

Name	Date	Reason For Changes	Version
Anbing Xue	03/27/2011	Initialize use case for sales team	1.0
Anbing Xue	03/28/2011	Create use case: manage account, manage contract, manage product, manage service	1.1
Diptanu Das	03/28/2011	Create use case: manage lead, manage account's contract	1.1
Anbing Xue	03/29/2011	Add create/modify account person, create/modify location, manage newsletters	1.2
Diptanu Das	03/29/2011	Manage newsletter template, communication	1.2