Invoice Creation

Scenario Name: Create an Invoice		ID Number: 1.1
Short Description: This use case describes how an invoice is created to bill a customer.		

Trigger: Job is completed_____

Type: External

Major Inputs:		Major Outputs:	
Description	Source	Description	Destination
Customer and job information	Job datastore	Invoice_____	Customer_____
Materials used_____	Supervisor__	New customer history_____	Customer file_
Labor hours_____	Supervisor__	Financial information_____	Accounting___
Job description_____	Supervisor__	_____	_____
Item information_____	Item datastore	_____	_____
_____	_____		

Major Steps Performed	Information for Steps
1. User selects work order to invoice	Selected work order
2. Enter cost of items	Material lists
2.1 Enter materials used	
2.2 Enter labor costs	Labor sheets
2.3 Enter special items or costs	
3. Review invoice total price	Final invoice price
3.1 If job is a contracted price, change calculated price to contract price; otherwise, use calculated price.	Supervisor's information
4. Write job narrative	New invoice
5. Save invoice	
6. Print invoice	

Maintain Product List

Scenario Name: Maintain product list in database	ID Number: 1.2

Short Description: This case describes how to update and maintain product lists.

Trigger: A new item is bought, or an item is bought from a new supplier._____

Type: External

Major Inputs:		Major Outputs:	
Description	Source	Description	Destination
New item information_____	Supplier____	New item history_____	Item file_____
Existing items information___	Item database	New supplier history_____	Supplier file__
New supplier information____	Supplier____	Updated item information__	Item file_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____		

Major Steps Performed	Information for Steps
1. Select item to add or update.	New item information
2. If item is a new product, add new item to database; otherwise, go to step 3.	
2.1 Create new item file.	New item history
2.1.1 Enter primary item name for use in system, item ID, item type, item price, item mark up rate and supplier's name for item.	
3. If supplier is new, add new supplier to database; otherwise, go to step 4.	New supplier information
	New supplier history
3.1 Create new supplier file.	Existing items information
3.1.1 Enter supplier information.	Updated item information
4. Edit selected item file.	
4.1 Add name supplier uses for selected item, to alternate item names file.	
5. Save changes.	

Promote Products

Scenario Name: Promote Products	ID Number: 1.3

Short Description: Marketing creates a product list and list of mailing and email addresses to send promotional material to.

Trigger: Management decides to send promotional material to stimulate sales._____

Type: External

Major Inputs:

Description   Source

Customer details_____   Customer file
Product prices_____   Product file__
Selected products to promote   Search_____
_____ _____
_____ _____
_____ _____

Major Outputs:

Description   Destination

Promotional product list___   Customer_____
Customer mailing list_____   Marketing____
Customer email list_____   Marketing____
_____ _____
_____ _____

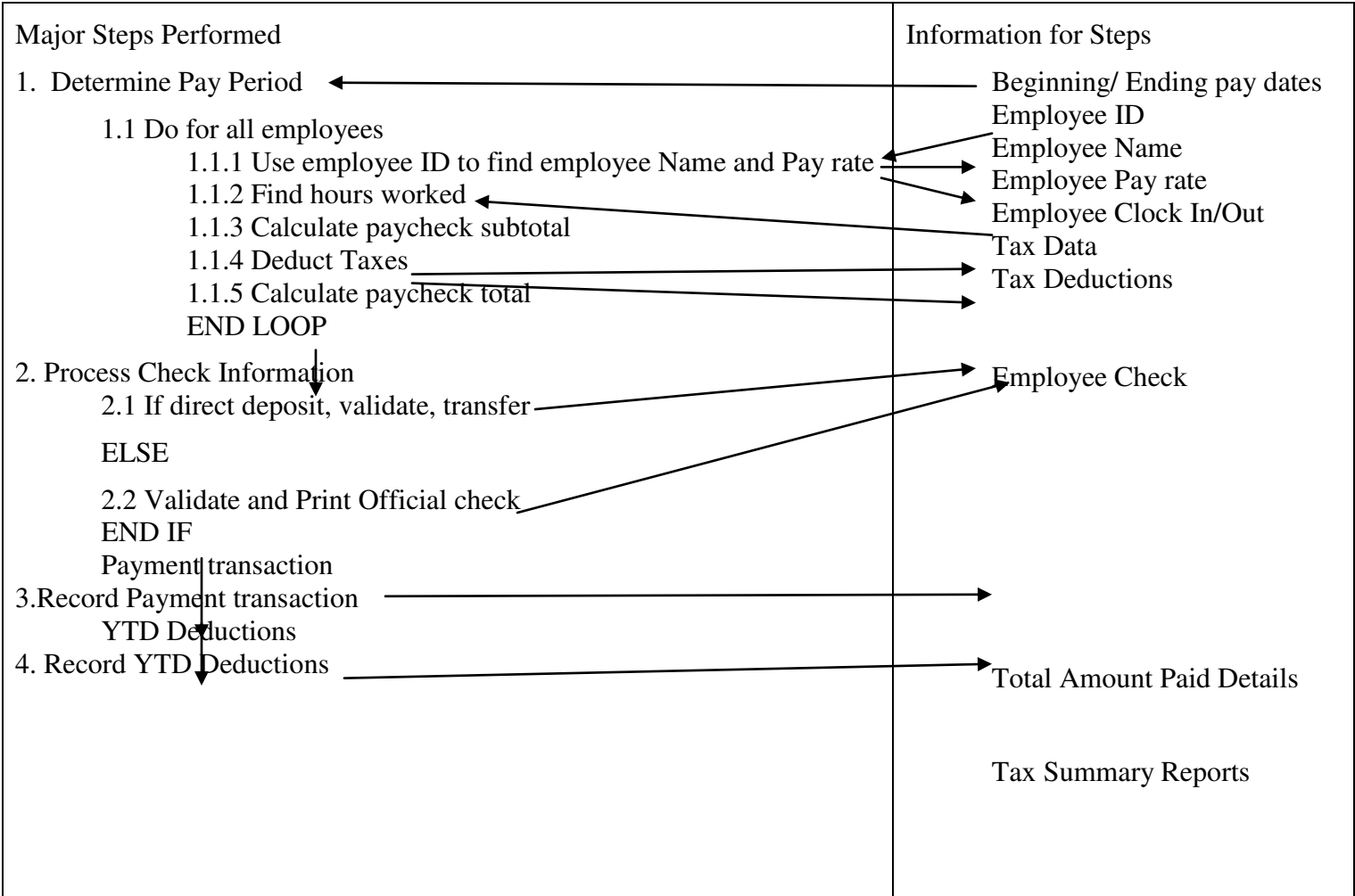**Major Steps Performed**

1. Search product lists, prices and customer favorites to select product list to promote.
2. Create promotional choices.
3. Select customers to send promotional material to.
4. Create promotional mailing list.
   4.1 Search Customer files for mailing address.
   4.2 Search Customer files for email address.
5. Send selected promotional material to selected customers.

Information for Steps

Product prices

Customer purchase history

New promotional product list

New promotion mailing list

Create Purchase Order

Scenario Name: Create a new purchase order	ID Number: 1.4

Short Description: This use case describes how to create a purchase order when buying supplies from a supplier.

Trigger: A decision to buy supplies is made._____

Type: External

Major Inputs:

Description	Source
Selected products to purchase	Inventory report
Supplier to purchase from___	Supplier price list
Payment details_____	Supplier_____
_____	_____
_____	_____
_____	_____

Major Outputs:

Description	Destination
Location of purchased items	Inventory____
Location of purchased items	Job site_____
Costs of purchased items___	Supplier file___
Total cost of purchase_____	Accounting___
Purchase order_____	Accounts payable

Major Steps Performed

1. Create new purchase order
2. Select items to purchase
3. Select supplier to purchase from
   3.1 Obtain item prices from suppliers
   3.2 Compare prices from different suppliers
   3.3 Buy from lowest priced supplier
      3.3.1 Order selected products from selected supplier
      3.3.2 Agree on payment terms with supplier
4. Assign location for purchased items
5. Save invoice

Information for Steps

Inventory report

Supplier price list

Updated supplier history

Total purchase order cost

Location of items

New purchase order

Prepare Employee Paychecks

Scenario Name: Payroll Database	ID Number: 2.1

| Short Description: This use case describes how the system will generate paychecks for Gladco Inc® employees on a bi-weekly basis. ||

| Trigger: Time to pay Employees

Type: External / Temporal ||

Major Inputs:			Major Outputs:		
Description		Source	Description		Destination
Employee Clock In/Out		Employee	Employee Check		Employee Total
Employee Pay Rate		Payroll Database	Total Amount Paid Details		General Ledger
Tax Deductions		Accountant	Tax Summary Report		General Ledger
Employee Name		Payroll Database			
Employee Tax Data		Payroll Database			
Beginning Pay Date		Payroll Database			
Ending Pay Date		Payroll Database			
Employee ID		Payroll Database			

Major Steps Performed	Information for Steps
1. Determine Pay Period	Beginning/ Ending pay dates
	Employee ID
1.1 Do for all employees	Employee Name
1.1.1 Use employee ID to find employee Name and Pay rate	Employee Pay rate
1.1.2 Find hours worked	Employee Clock In/Out
1.1.3 Calculate paycheck subtotal	Tax Data
1.1.4 Deduct Taxes	Tax Deductions
1.1.5 Calculate paycheck total	
END LOOP	
2. Process Check Information	Employee Check
2.1 If direct deposit, validate, transfer	
ELSE	
2.2 Validate and Print Official check	
END IF	
Payment transaction	
3.Record Payment transaction	
YTD Deductions	
4. Record YTD Deductions	Total Amount Paid Details
	Tax Summary Reports

State & Federal Payroll Quarterly

Scenario Name: Preparing State and Federal Payroll taxes	ID Number: _2.2_
Short Description: This use case describes how the state and federal taxes are sent in quarterly.	

Trigger: End of Quarter Reporting
Type: Internal

Major Inputs:		Major Outputs:	
Description	Source	Description	Destination
State Tax	Payroll	State Tax Report	Arkansas
Federal Tax	Payroll	Federal Tax Report	IRS
		Check Details	Accounts Payable

Major Steps Performed	Information for Steps

1. Print out Form 941
   1.1 Do for all quarterly tax returns
        1.1.1   Request for a 1040-E-S from IRS
        1.1.2   Enter expected gross income for the new year on line 1.
      End Loop
2. Enter estimated amount of your deductions on line 2.
   2.1 Take Standard deductions from page one of the form
   2.2 Subtract line 2 from line 1
   2.3 Then multiply the number of personal exemptions by $3,400.
   2.4 Then subtract Line 4 from Line 3.
3. Find your tax on the amount entered on line 5.
   3.1 Use the Tax Schedules table that's provided.
   3.2 Enter your tax totals on line 6 and 7 on line 8.
4. Go to Line 9 and enter credits
   4.1 Refer to lines 47 through 55 on Form 1040.
   4.2 Subtract line 9 from line 8 and enter total on line 10.
5. Calculate you employment tax on line 11 and other taxes you
   Expect to owe on line 12.
   5.1 one line 13a, add the amount from line 10 through 12.
   5.2 Fill in your earned income credit, additional child tax
      Credit on line 13b
   5.3 Figure your total current year's estimated tax by
      Subtracting Line 13b from 13a.
   5.4 Take the estimated tax amount from line 13c and
      Multiply by 90%.
   5.5 then enter total on line 14a.
6. Refer to your most recent quarterly tax return to enter that tax
   On line 14b.
   6.1 On line 14c enter the smaller amount of line 14a or 14b.
   6.2 Any tax that is withheld or expected to be withheld
      Should be entered on line15
7. Subtract line 15 from line 14c on line 16a to determine
   Whether to make payments.
   7.1 If you get zero, then you don't have to make payments.
   Else
   7.2 Go to line 16b and subtract line 15 from line 13c
   Else If
   7.3 You need to make payments if you get a total greater
   Than $1000 or more.
   End If	

Recording Labor Hours

Scenario Name: Payroll labor hours	ID Number: 2.3

Short Description: This use case describes how labor hours are recorded when employees clock in and out.

Trigger: Employees clock in and out

Type: External / Temporal

Major Inputs:

Description	Source
Clock-In	Employee
Clock-Out	Employee
Employee ID	Employee Database

Major Outputs:

Description	Destination
Recorded hours worked	Payroll Database

Major Steps Performed	Information
Do for all employee's	
1. Employee use Employee ID to clock-In	Clock-In
	Employee ID
2. Employee use Employee ID to clock-out	
3. Keep record of total hours worked	Clock-Out
END LOOP	Employee ID
	Recorded hours worked

Gather Employee Payroll Information

Scenario Name: Payroll Information	ID Number: 2.4
Short Description: This use case describes how the system will collect employee information in order to generate a bi-weekly paycheck and if the check will go to an employee or deposited into a bank account.	
Trigger: Employee Select Payment Method Type: External / Temporal	

Major Inputs:		Major Outputs:	
Description	Source	Description	Destination
Employee Info	Employee	Payment Method	Prepare Employee
Paycheck			
Employee Banking Information	Employee		
Employee Mailing Address	Employee		

Major Steps Performed	Information for Steps

Do for all employee pay period
 	
 1. Employee specify the payment method
     1.1 If the Employee selects direct deposit, the system requests that employee gives banking information
     1.2 If the Employee selects the mail to address, the system requests that employee gives the address
     ELSE
     1.3 Print out pay check
     END IF
 END LOOP
 2. When employee gives required information, the system update employee information to coincide with the payment method
     Finalization
	Banking information
	
	 Mailing Address
	
	 Employee Information
	
	 Payment Method

W-2 Yearly

Scenario Name: Preparing W-2 for end of working year.
Short Description: This use case describes how employees W-2 are done.
Trigger: End of Year Reporting
Type: Internal

Major Inputs:		Major Outputs:	
Description	**Source**	**Description**	**Source**
State Tax	Payroll	State Tax Report	Arkansas
Federal Tax	**Payroll**	Federal Tax Report	IRS
		Check Details Payable	Accounts

 Major Steps Performed   Information for
Steps
1.   Enter employees legal business name and address in upper left corner (box c)
    1.1   Do for all each employee w-2 form
        1.1.1   Below box e enter employee's full name as appears on
                   The payroll and employees address
                   End Loop
2.   Total the employees's wages and other compensation and enter in box 1
    2.1   Total federal income tax withheld and put in box 2
    2.2   Enter the total compensation to social security in box 3
    2.3   Enter the social security tax withheld in box 4
3.   Enter Social Security tips in box 7
    3.1 enter allocated tips in box 8
    3.2 Enter medicare wages in box 5
4. Enter totals of advance earned income credits in box 9
     4.1 enter dependent benefits in box 11
5. In box 13 enter information about employees sick etc.
6. Enter the federal employer id in box b (under box 12d)
       6.1 Enter employee social security number in box d (under box 13)
7. Enter the 2-letter abbreviation for the state in box 15
        7.1 Enter state wages in box 16
        7.2 Enter taxes withheld from state in box 17
        7.3 Enter local tax information, if any in boxes 18-20

Customer Places an Order

Scenario Name: Customer Places an Order	ID Number: __3.1__
Short Description: This use case describes the process of customers ordering products and paying for them through the website.	
Trigger: Customer decides to make an order on the website.	
Type: External	

Major Inputs:		**Major Outputs:**	
Description	Source	Description	Destination
Customer Info	Customer	Receipt	Customer
Product Info	Product Catalog	Product	Customer
Payment Method	Customer	New customer record	Customer File
Product Price	Product Catalog		
Select Product	Search Use Case		

Major Steps Performed	**Information for Steps**
1. Product is selected to buy.	Search function use case
2. If returning customer, access account information.	Customer username and password
Product to buy Customer Information	
3. If new customer, establish account if requested; otherwise, gather customer info.	Customer info
New Customer Information	New Customer Record
4. Calculate Total Purchase Cost	Product price
	Total Purchase cost
Total Purchase Cost	
5. Gather Payment Information	Payment Details
6. Verify Payment Information	Credit Card Authorization
7. Get customer purchase confirmation	Customer purchase confirmation
8. Complete purchase from business end	New purchase record

Edit Catalog

Scenario Name: Admin updates/edits catalog	ID Number: __3.2__
Short Description: This use case describes the process of the employee in charge of the website keeping the catalog up to date.	
Trigger: Something in the catalog changes.	
Type: External	

Major Inputs:		**Major Outputs:**	
Description	Source	Description	Destination
New Product Info	Manager/Admin	Updated Product Catalog	Website
New Product Price	Manager/Admin		
Admin login info	Manager/Admin		

Major Steps Performed	**Information for Steps**
1. A new product is available or an existing product is changed	Product info/product catalog
2. Admin logs in to website Employee info	Employee info
3. New product is added or existing product info is changed	Product info/product catalog
3.1 name is changed	
3.2 price is changed	New product info/price
3.3 other info is changed	

Obtain Product Information

Scenario Name: Customer Obtains Product Information	ID Number: __3.3__

Short Description: This use case describes the process of customers obtaining information on specific products through the website search function.

Trigger: Customer wants information on specific product(s).

Type: External

Major Inputs:

Description	Source
Use of Search Function	Search Use Case
Product Catalog	Website
Product Information	Product Catalog

Major Outputs:

Description	Destination
Product Info	Customer
Customer Info	Customer File

Major Steps Performed	**Information for Steps**
1. Customer uses search function	Search use case
2. Product is selected to observe	Product info/product catalog
3. Product information is displayed	
4. New customer information is obtained	Customer info

Product Review

Scenario Name: Customer Writes a Product Review	ID Number: _ 3.4__

Short Description: This use case describes the process of customers reviewing and commenting on products that they have ordered through the website, and their general online experience.

Trigger: Customer orders a product online and wants to give feedback.

Type: External

Major Inputs:

Description	Source
Product Info	Product Catalog
Customer Info	Customer
Online Feedback Form	Website

Major Outputs:

Description	Destination
Product Review	Website
Customer Info	Customer File

Major Steps Performed

1. Product(s) are ordered from the website

2. Customer is asked to rate product after it is delivered

3. If customer writes a review, it can be about

    3.1 the product itself

    3.2 their entire online experience on gladcosupply.com

Information for Steps

Product order use case

Product info

Customer info

Online Feedback Form

Retrieve Contact Information

Scenario Name: Customer retrieves contact information	ID Number: _ 3.5 _
Short Description: This use case describes the process of customers contacting the business through the email function or by other information provided by the website.	
Trigger: Customer decides to contact the business.	
Type: External	

Major Inputs:		Major Outputs:	
Description	Source	Description	Destination
Business Contact Info	Website	Email to business	Customer File
Website Email Service	Website		
Customer Inquiry	Customer		
Customer Info	Customer		

Major Steps Performed	Information for Steps
1. Customer enters website	Customer info/login use case
2. Contact feature is accessed	Customer Inquiry
	Website email service
3. Customer can choose to contact Gladco through:	
3.1 email	Contact info
3.2 phone	

Search Function

Scenario Name: Customer Searches Through Catalog	ID Number: _ 3.6 __
Short Description: This use case describes the process of customers browsing the website catalog for a product.	
Trigger: Customer browses the catalog on the website.	
Type: External	

Major Inputs:		Major Outputs:	
Description	Source	Description	Destination
Customer Request	Customer	Customer Information	Customer File
Products matching request	Product catalog	Selected Product	Customer order
Customer product selection	Customer		Use case

Major Steps Performed	Information for Steps
1. Customer enters web site	Customer info
2. Customer browses catalog by:	Search request
2.1 brand	Product catalog
2.2 category	Product matching request
2.3 size	
2.4 style	
3. Customer selects product to order	Customer product selection

Account Creation

Scenario Name: User creates an account	ID Number: __3.7__

Short Description: This use case describes the process of a user creating a user account on the website.

Trigger: Customer wants to use the website functionality.

Type: External

Major Inputs:		**Major Outputs:**	
Description	Source	Description	Destination
Customer Information	Customer	New Customer Info	Customer File
Customer username	Customer	Customer Account	Customer File
Customer password	Customer	Customer login info	Customer

Major Steps Performed

1. User accesses website functionality

2. If new customer, establish account ──────────→ New Customer info

    2.1 Enter user info ←────────── User Information
    2.2 Create username/password ←──────

Username/password

Information for Steps

Website Login

Scenario Name: User logs in to account		ID Number: _ 3.8 _
Short Description: This use case describes the process of a user logging in to their website account.		
Trigger: Customer wants to use the website functionality.		
Type: External		

Major Inputs:		**Major Outputs:**	
Description	Source	Description	Destination
Customer Information	Customer	User Account	Customer File
Customer username	Customer		
Customer password	Customer		

Major Steps Performed	**Information for Steps**
1. User accesses website functionality	
2. User is asked to log in ←	Customer username/password
3. Enter account info ←	Customer Information