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# GUARDIAN HOME SERVICES

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*QUICK→QUOTE*

USE CASE SPECIFICATION: LOOKUP CUSTOMER

VERSION 13.4

QUICK→QUOTE	Version: 10.7
Use Case Specification: Lookup Customer	Date: 02/14/20
Functional Requirements Specification	

## Revision History

Date	Version	Description	Author
05/22/2018	1.0	Initial draft	Sukanya Madhavan
06/13/2018	1.1	Revisions – SME review	Crystal Bolander
06/19/2018	1.2	Revisions - SME review	Sukanya Madhavan
08/30/2018	2.1	Added Wire Frames	Janet Alexander
09/08/2018	2.2	Per SME review on 09/08/2018: <ol style="list-style-type: none"> <li>1. Removed Business flow from document.</li> <li>2. Added wireframe information to each applicable activity in the Activity Diagram</li> </ol>	Jason Barns
06/05/2019	3.1	Updated: Assumptions and Special Requirements	Atul Gupta

## Approval History

Date	Version	Approval/Sign Off Details	Author
5/19/2019	3.0	Business Approval for Lookup Customer	Atul Gupta
5/21/2019	3.1	Technical Approval for Lookup Customer	Atul Gupta
8/26/2019	3.2	Hand Off to Design Team for Lookup Customer	Atul Gupta

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# Use Case Specification: Lookup Customer

## 1. Use Case Name: Lookup Customer

### 1.1 Brief Description

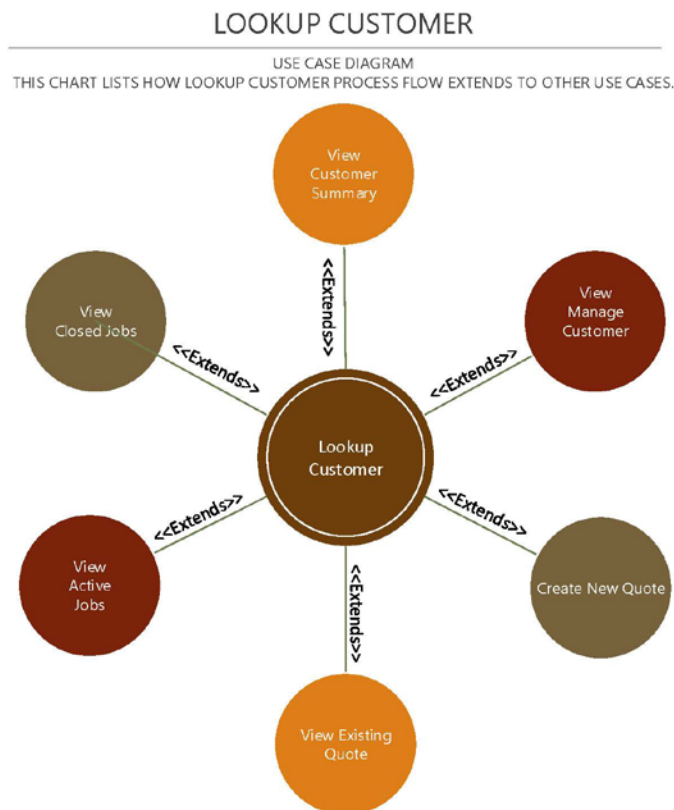
This use case details the steps involved in searching for customer records in the system. It includes the scenarios for search results matching the search criteria and for returning zero records found. The use case begins when the customer service representative (CSR) selects the Customer Lookup option or an extending use case calls Lookup Customer. The use case ends when the system successfully displays the CSR's search criteria and the user selects a customer.

**NOTE: The wire frames in this document have been updated based on SME design sessions. Refer to the document "UI Prototype022019.doc" for the latest UI/wire frames.**

## 2. Assumptions

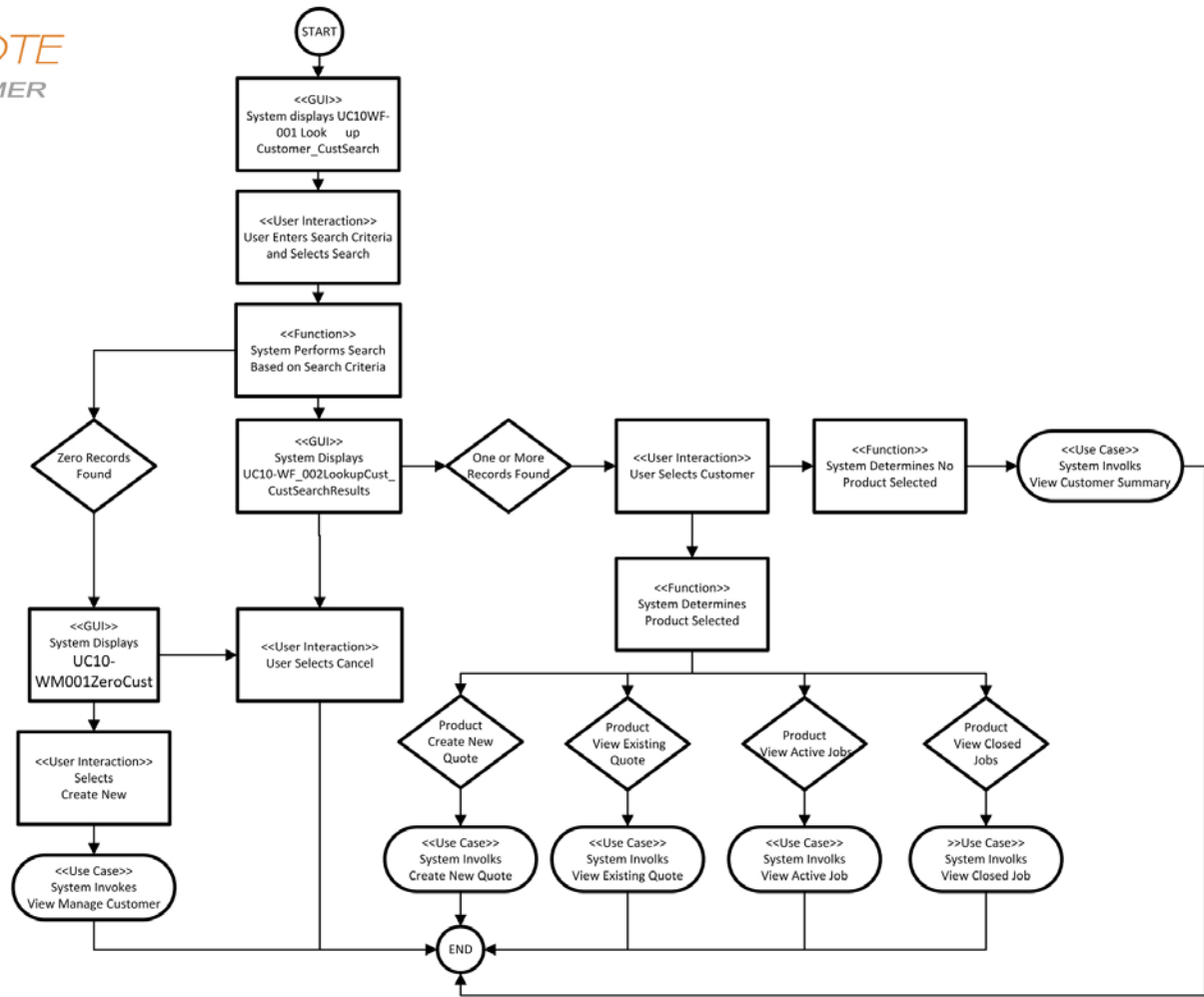
N/A

## 3. Use Case Diagram



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#### 4. UC10.3 Activity Diagram



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## 5. Actors

### 5.1 Primary Actor

- CSR

### 5.2 Secondary Actors

None

## 6. Preconditions

### 6.1 Login

User has logged into the system

### 6.2 Network

Network is up and active

## 7. Triggers

User selects “Lookup Customer”

Use Case “Manage Customer”

Use Case “Create New Quote”

Use Case “View Existing Quote”

Use Case “View Active Jobs”

User selects “View Closed Jobs”

## 8. Flow of Events

### 8.1 Basic Flow –One or more records found.

1. System displays the *Customer Search* screen as per wire frame *UC10-WF-001Lookup\_Customer\_CustSearch*.
2. User enters search criteria and selects *Search*.  
**[A-1: User selects Cancel].**
3. System performs search based on search criteria.  
**[A-2: Zero Matching Record].**
4. System displays *UC10-WF-002Lookup\_Customer\_CustSearchResults*. Results window displays:
  - a. Account Number.
  - b. Customer Last Name.
  - c. Customer First Name.
  - d. Customer’s Phone Number.
  - e. Customer’s Email Address.
  - f. Customer’s Address 1.
  - g. Customer’s Address 2.
  - h. Customer’s City.
  - i. Customer’s State.
5. User double-clicks the customer’s record.  
**[A-3: Search Again].**  
**[A-4: Create New Customer].**
6. System determines if Lookup Customer was called from extended programs.  
**[A-5: Manage Customer].**  
**[A-6: Create\_New\_Quote].**

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[A-7: Existing\_Quote].

[A-8: View\_Active\_Job].

[A-9: View\_Closed\_Job].

7. System invokes UC View Customer Summary.
8. Use Case Ends.

#### **8.1.1 A-1 User Selctcs Cancel in UC10-WF-001Lookup Customer\_CustSearch.**

1. Alternate flow begins at Step-2 of Basic Flow.
2. System closes Search Customer.
3. Use Case ends.

#### **8.1.2 A-2 Zero Matching Record.**

1. Alternate flow begins at Step-3 of Basic Flow.
2. The system finds No result (i.e. Zero records) based on search criteria.
3. System displays *Customer Search Screen* with message *UC10-WM001ZeroCust*.
4. User selects *Create New* link on *UC10-WM001ZeroCust*.
5. Go to [A-4 Create New Customer].

#### **8.1.3 A-3 Search Again.**

1. Alternate Flow begins at Step 5 of Basic Flow.
2. System invokes returns to step 1.

#### **8.1.4 A-4 Create New Customer.**

1. Alternate Flow begins at Step 5 of Basic Flow.
2. User selects Create New.
3. System invokes UC Manage Customer.
4. Use Case Ends.

#### **8.1.5 A-5 Manage Customer Called Lookup Customer.**

1. Alternate Flow begins at Step 6 of Basic Flow.
2. System invokes UC Manage Customer.
3. Use Case Ends.

#### **8.1.6 A-6 Product Type Create Quote.**

1. Alternate Flow begins at Step 6 of Basic Flow.
2. System invokes UC Create Quote.
3. Use Case Endes.

#### **8.1.7 A-6 Product Type View Existing Quote.**

4. Alternate Flow begins at Step 6 of Basic Flow.
5. System invokes UC View Existing Quote.
6. Use Case Ends.

#### **8.1.8 A-7 Product Type View Active Job.**

1. Alternate flow begins at step 6 of basic flow.
2. System invokes UC View Active Job.
3. Use Case Ends.

#### **8.1.9 A-8 View Closed Jobs.**

1. Alternate Flow begins at Step 6 of Basic Flow.
2. System invokes UC View Closed Jobs.
3. Use Case Ends.



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## 9. Post Conditions

### 9.1 Success

Customer record exists in the system.

### 9.2 Failure

Customer record does not exist in the system.

## 10. Applicable Interfaces

None

## 11. Conceptual User Design Interface (Wire frames)

### 11.1 Customer Lookup\_ UC10-WF-001LookupCustomer\_CustSearch.

### 11.2 Customer Lookup Search Results: UC10-WF-002LookupCustSearch\_Results.

CUSTOMER LIST									
Double Click on Row to Select Customer									
Order Number	Last Name	First	Phone	Email	Address 1	Address 2	City	State	ZIP
AXG-895	HEARD	SAMUAL	801.555.9632	MH245@GMAIL.COM	123 SOUTH MIAMI		DALLAS	TX	75235
GHJ-636	HEARD	SANDRA	972.885.6363	SHEARD1@YAHOO.COM	197 CHURCH ST.		ROCKWALL	TX	75028
BMJ-417	HEARD	JAMES	475.787.5656	JH234@GMAIL.COM	FAIR OAKS DR.		DALLAS	TX	75240
JEA-055	HEARD	JONAH	930.555.9955	JON56@EMAIL.COM	CLEAR WATER TR.		DALLAS	TX	75024

Buttons: Cancel, Create New, Search Again

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### 11.3 Customer Lookup\_ UC10-WF-003Lookup Customer\_CustSearchResults\_0

## 12. Data Source

See UC10 Lookup Customer Supporting Artifact v1.2 (Tab: Data Elements)

## 13. Business Rules

N/A

## 14. Glossary

Please refer to Quick→Quote Glossary.doc

## 15. Special Requirements

Reference Number	Requirement
SR-1	Make all columns sort on UC10-WF-002CustResult.
SR-2	All displayed results in the following sort order: Last Name First Name Phone Email
SR-3	Display all search results on one page, there should be no pagination of results.
SR-5	From UC10-WF-001 the user should have the ability to simply select 'Enter' on the user's keyboard to proceed in looking up the customer. The 'Enter' should function the same as if the user clicked on the 'Find' button from this wireframe. (CR# 4477)
SR-6	The search criteria entered into UC10-WF-001 should be persisted to UC11-WF-001 when the search results equal zero and the user selects 'Add' customer.

## 16. Stakeholders List

Stakeholder Name	Role	Reports to	Department
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	Reviewer, Approver,		
<b>Bonnie Leonard</b>	<b>R</b>	<b>Daniel Robinson</b>	
<b>Bob Heard</b>	<b>R</b>	<b>Daniel Robinson</b>	
<b>Daniel Robinson</b>	<b>A</b>		

## 17. Open Issues

Reference Number	Question	Response	Status	Open Date	Response Date
1	Identify business rules and field validation rules	Business rules have been identified. Any additional rules would be updated to this document.	<b>Closed</b>		06/17/2016
3	Validation of information upon completion of page Vs. validating the data once the field is complete	Data validations identified in UC10 Lookup Customer Supporting Artifact (Tab: Data Elements)	<b>Closed</b>		09/08/2017