Process flow – Swim Lane Case Overview:

The Discount Auto Parts Store has ask the BA Team to document the sales order process for the fulfillment of product orders. One of the Business Analysts on the team has completed the elicitation interviews with various Subject Matter Experts (SMEs) in multiple departments supporting in the sales order process. You have determined that the best analysis tool to document the current As Is state of Discount Auto Parts Store's sale order process would be with at Swim Lane Process Flow diagram.

Use the Sale Order Narrative (below) assembled from the interview notes to develop a Swim Lane diagram taking into account, the actor/agents, tasks completed and the sequence in which they are completed.

You may use the Excel or PowerPoint Template on the class web site or generate the diagram or with any other tool you may have at your disposal to capture a Swim Lane view of the process.

Process Mapping: A Sales Order Narrative

The process begins with a Discount Auto Parts Product Specialist making a sales call on a customer and issues a price quote. A copy of the sales quote is given to the customer and another is sent to the Procurement sales office.

The customer calls the Procurement sales office to place the order where they will ask for a delivery date. To get a delivery date, the Procurement sales office contacts the Fulfillment supervisor to find out if the order can be shipped from inventory.

The Fulfillment supervisor must check the inventory and then respond with a date of availability.

Next, the Procurement sales clerk must check the customer's credit to make sure the order does not exceed the customer's credit limit. To do this, they fill out a credit-check form and send it to Receivables department.

The Receivables department performs the credit check, fills in the form and returns it to the Procurement sale office.

The Procurement sales clerk checks the available balance against the order and if there is sufficient credit, then sends the customer the order form with the delivery date for their final approval.

The customer signs the order form and sends it back to the Procurement sales clerk for processing.

When the Procurement sales office receives the final approved order from the customer, they will then generate a packing list and invoice. The packing list is sent to Fulfillment and the invoice is sent to the Receivables department.

At the Fulfillment department, the products are picked from the shelves, packed and shipped to the customer. The Fulfillment clerk will send a final packing list to the Receivables Department showing the goods that were actually shipped.

The Receivables Department obtains the invoice from the Procurement sales clerk and the packing list form the Fulfillment department where they will confirm the match between the invoice and the final packing list. If a good match is determined then the Receivables department will enter the purchase into the Billing System and generate a final invoice to be sent it to the customer for payment.

Once the customer receives their goods and subsequent invoice, they will send a check to the Receivables department.

When Receivables department obtains the check from the customer they will enter the payment into the Billing system then send a final copy of the paid invoice to the Discount Auto Parts Product Specialist for their recorders.

The Sales Order process is completed