The process begins when Stella-Incorporated's salesperson makes a sales' call on a customer and issues a price quote, if the customer is interested in Stella-Incorporated's product. A copy of the sales quote is given to the customer, and another is sent to the internal salesclerk.

The customer reviews the quote and then calls the internal salesclerk to select another product, cancel the order or place the order. If the customer chooses to place the order, then they must request a delivery date. To get a delivery date, the internal salesclerk contacts the warehouse supervisor to find out if the order can be shipped from inventory. The warehouse supervisor must check the inventory and respond with a date which the salesclerk shares with the customer.

Next, the internal salesclerk must check the customer's credit to make sure the order does not exceed their credit limit. To do this, they fill out a credit check form and send it to accounting. Accounting performs the credit check and returns it to the internal salesclerk.

The internal salesclerk checks the available balance against the order and if there is sufficient credit, the salesclerk sends the customer back the order form with the delivery date for approval. The customer signs the order form and sends it back to the internal salesclerk.

The internal salesclerk receives the final order and generates a packing list and an invoice. The packing list is sent to the warehouse and the invoice is sent to accounting. At the warehouse, the products are picked from the shelves, packed and shipped to the customer. The warehouse sends a final packing list to accounting showing the good shipped.

Accounting receives the invoice from sales and the packing list from the warehouse and checks that they match. They then generate a final invoice and send it to the customer for payment.

Once the customer receives their goods and the invoice, they send a check to accounting. Accounting receives the check and enters the payment into the system. They then send a final copy of the order back to the external salesperson for their records. This closes the sales process.

Create your "As-Is" Swim Lane (20 minutes):

Task 1: Construct a Swim Lane Diagram the details the actors, actions, decisions and sequences of events for the Sales Process.

Add your notes from the case here:

Create your "As-Is" ERD Lane (20 minutes):

Task 2: Construct an ERD that details the entities, attributes and relationships required to generate an order.

Add your notes from the case here:

Finally – Let us know what you think about this activity.