Requirements/Design Specification

**Capture/CRM Competitor Functionality**

**CR**

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 3/3/2014 | 1.0 | Initial Version with Requirements | Roger Behm |
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# Business Requirements

## Purpose of the Design Specification

This document highlights the redesign of Competitors to be part of the container configuration section of a quote. This functionality will allow quoting new business for a site that is serviced by multiple competitors within a single quote.

### Business Functional Requirements / Configuration

| **Business Functional Requirement** | **Notes** |
| --- | --- |
| Give Capture the ability to specify competitor acquisition based on each container within a quote. | On the config page display a dropdown list of the competitors for that division |
| Pricing | Current pricing formulas should not change. Currently only New/New and Waste Management have applied adjustments. |
| Doc Engine | In the event a quote has multiple competitors the transaction/reason and competitor codes will populate in the comments secion of the office use CSA. A list of transaction reason codes can be found in the attachment. |

### Technical Design Requirements

| **Technical Design Requirement** | **Notes** |
| --- | --- |
| Config (Select Service Offering) page | * Add the |
| Commerce | * Remove |
| Documentation   * CSA * Proposal * Sample Invoice |  |
| InfoPro Interfce |  |

# Assumptions

* The following items are assumptionsout of scope
* Close Account functionality on last page

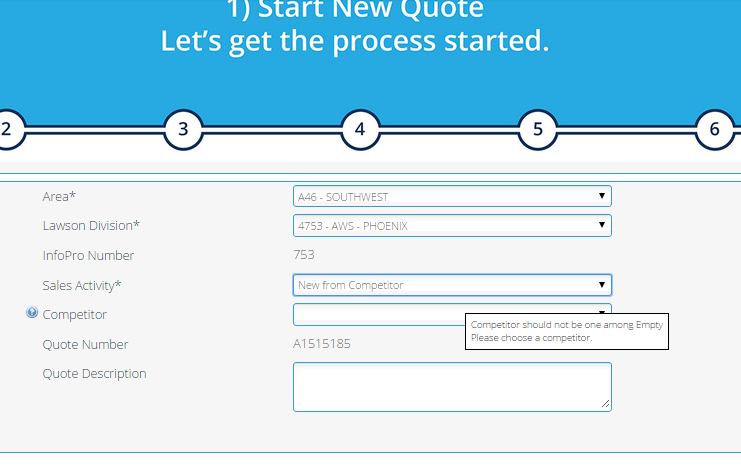
# Technical Design

## Referenced Documents

None

## Process Flow and Mock Ups

Figure 3.1 – Page 1 of quote creation



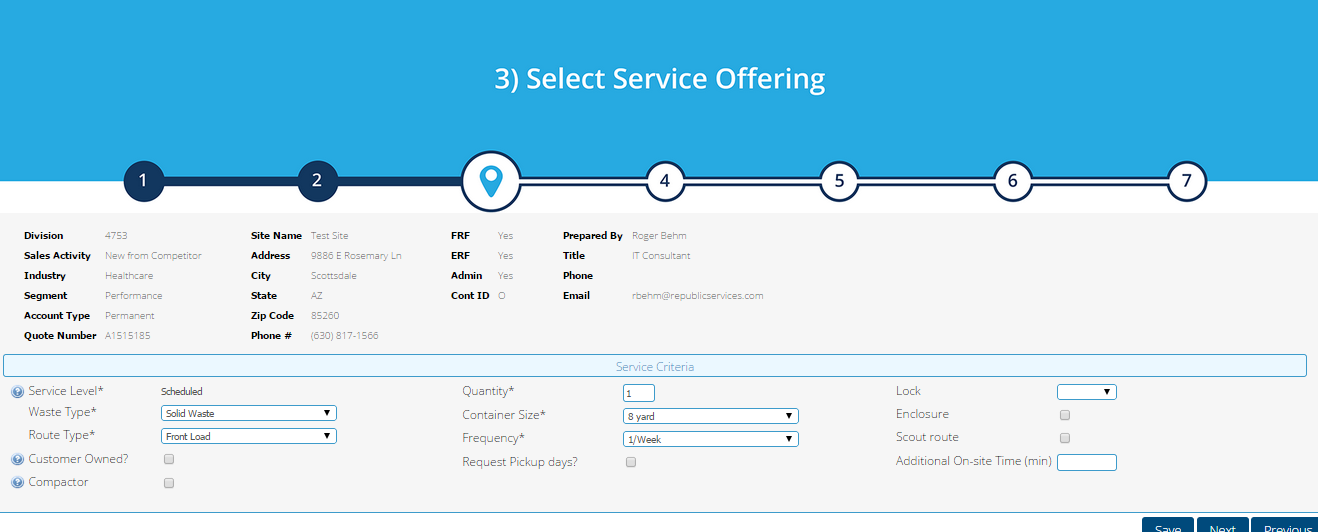
Remove:

* “New from Competitor” option from Sales Activity field
* Competitor Field
* Validation Rule

Figure 3.2 – Config Small Container

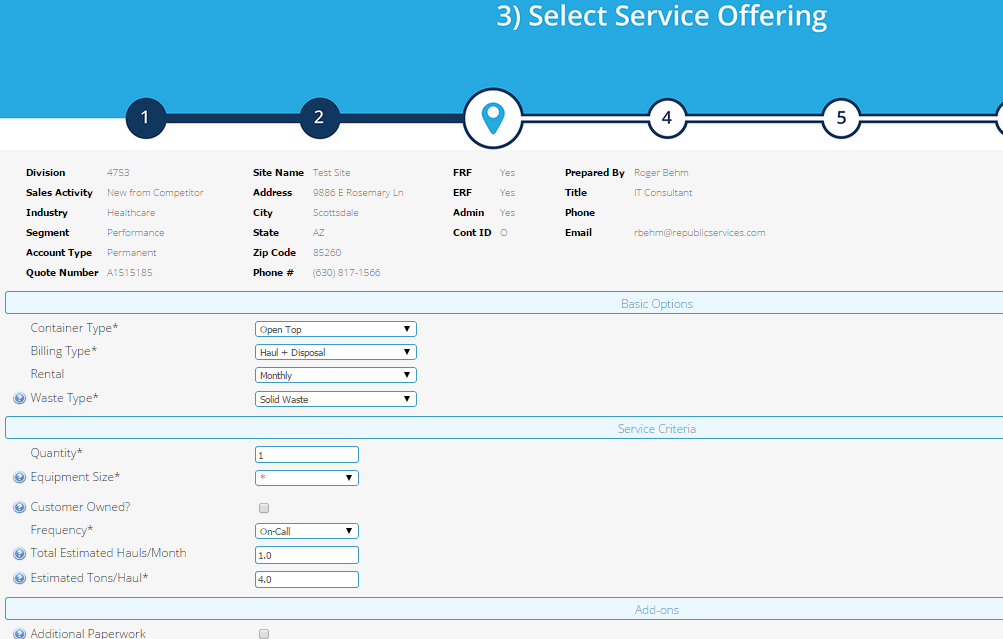


Figure 3.3 – Config Large Container

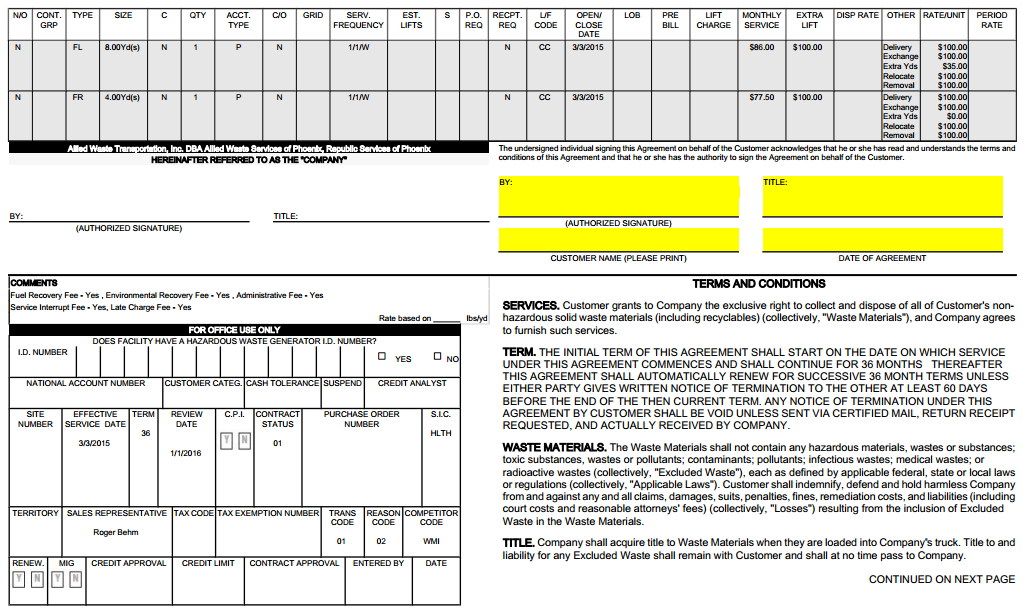


Add competitor (figure 3.2) field to New/NewSmall here

Figure 3.4 – Config Large Container



Add competitor field to New/NewLarge here



Add Tran/Reason Code and Competitor code to comments if mutli competitor container

## Functional Logic

NA

## Data Sources & Mapping

* For detailed mapping information, please refer to the BMI [Enterprise Mapping Document](http://itpmo-2013projects/Pricing%20Initiative/2.0%20Planning%20and%20Requirements/BMI%20Enterprise%20Mapping%20Document.xlsx).
* No additional data sources or mappings needed

## InfoPro Interface

The following tags will need to be consumed by the AAE process:

# Report Changes

No Changes

# Appendix