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 |
| 3/5/2015 | 1.1 | Completed the InfoPro interface section | Nadine Davies |
| 3/5/2015 | 1.2 | Build out technical requirements | John Palubinskas |
|  |  |  |  |
|  |  |  |  |

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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. (Competitors will no longer be populated at the Area level.)  - The default entry in the list should be blank.  - The entries should be displayed alphabetically by the competitor name, but stored using the competitor code.  - Help text should assist the user determine when to choose a value from the competitor list. |
| Pricing | Current pricing formulas should not change. Currently only New/New and Waste Management have applied adjustments, but all divisions should still have the ability to adjust pricing per competitor as specified in the CMC. |
| Doc Engine | In the event a quote has containers with associated competitors, the transaction/reason and competitor codes will populate in last column of the line item on the office use CSA (replacing the Period Rate column.)  A list of transaction reason codes can be found in the attachment. |
| Service Change | Rate Adjustment – Rollback due to Competitve Bid  Close Container Group – 02 – Lost to Competitor  Close Container Group – 56 –Competitor Pricing |

### Technical Design Requirements

| **Technical Design Requirement** | **Notes** |
| --- | --- |
| Config | **Select Service Offering Page**   * Add the competitor dropdown to small and large container configs per Figure 3‑3- Small Container Config and Figure 3‑4- Large Container Config. * Modify any constraint rules based on the Area\_Competitor table to use div\_competitor\_adj where needed. * Constrain the competitor dropdown to only display competitors based on the selected division for the quote (division\_quote) * Update all competitor menu items to be the Displayed Text (Competitor\_Nm) and Variable Name (Competitor\_Cd concatenated with region). |
| Commerce | **Start New Quote Page**  See Figure 3‑1-   * Remove the Sales Activity ‘New from Competitor’ option * Remove existing competitor dropdown list * Remove all constraint rules pertaining to the competitor dropdown list * Modify all commerce transition rules that reference ‘new from competitor’ as needed (do a BML search on ‘competitor’). |
| Documentation   * CSA * Proposal * Sample Invoice | **CSA**  See Figure 3‑5- Office Use CSA   * Replace ‘Period Rate’ column heading with TC/RC CMP. Column should only be visible for the Office Use CSA. * Populate the updated line item column with the transactionCode\_line, reasonCode\_line, competitorCode\_line * Remove from the Office Use CSA box the fields: TRANS CODE, REASON CODE, COMPETITOR CODE   **Proposal**   * No updates   **Sample Invoice**   * No updates |
| InfoPro Interface |  |
| Data Tables | * As competitors are now based on the divisional table div\_competitor\_adj, the Area\_Competitors and Competitors tables can be retired. * Div\_competitor\_adj requires a new String column ‘region’ populated with the InfoPro Region letter (A,E,F,M,N,O,R,S,V,W) * The key (division, region, Competitor\_Cd) should be specified on the div\_competitor\_adj data table |

# Assumptions

The following items are out of scope:

* Close Account functionality on last page

# Technical Design

## Referenced Documents

None

## Process Flow and Mock Ups

Remove:

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

Figure ‑- Start New Quote Page Updates

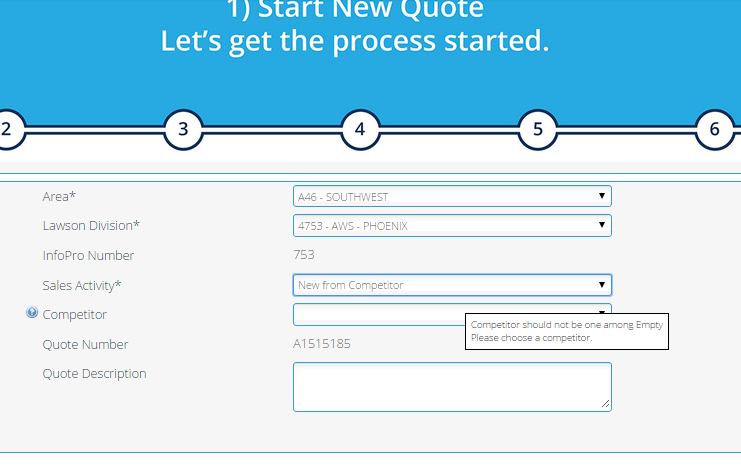
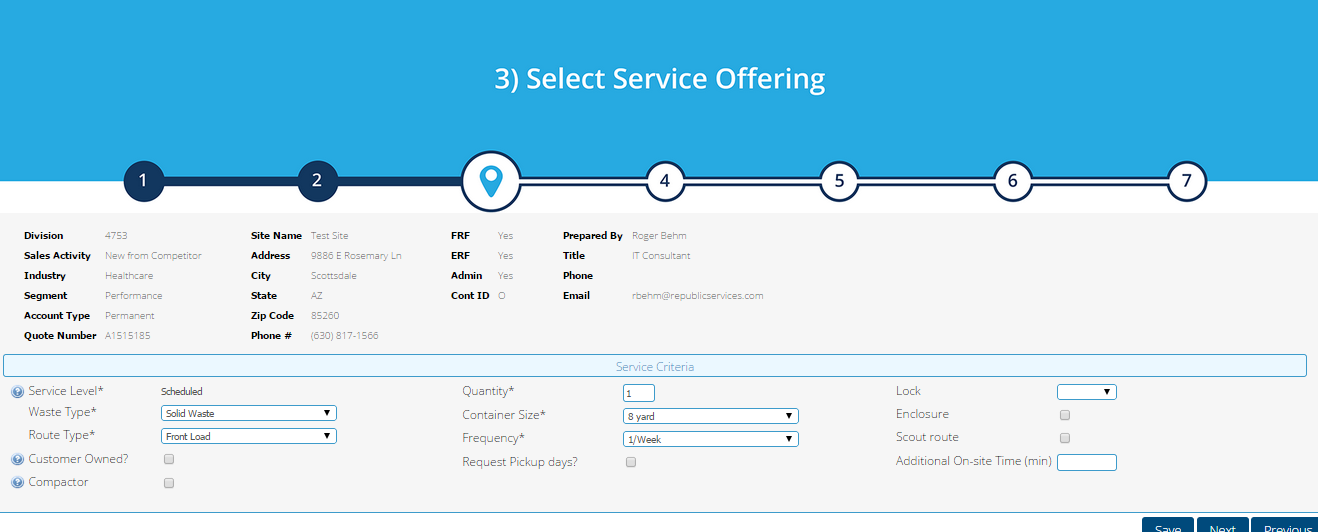


Figure ‑ - Competitor dropdown

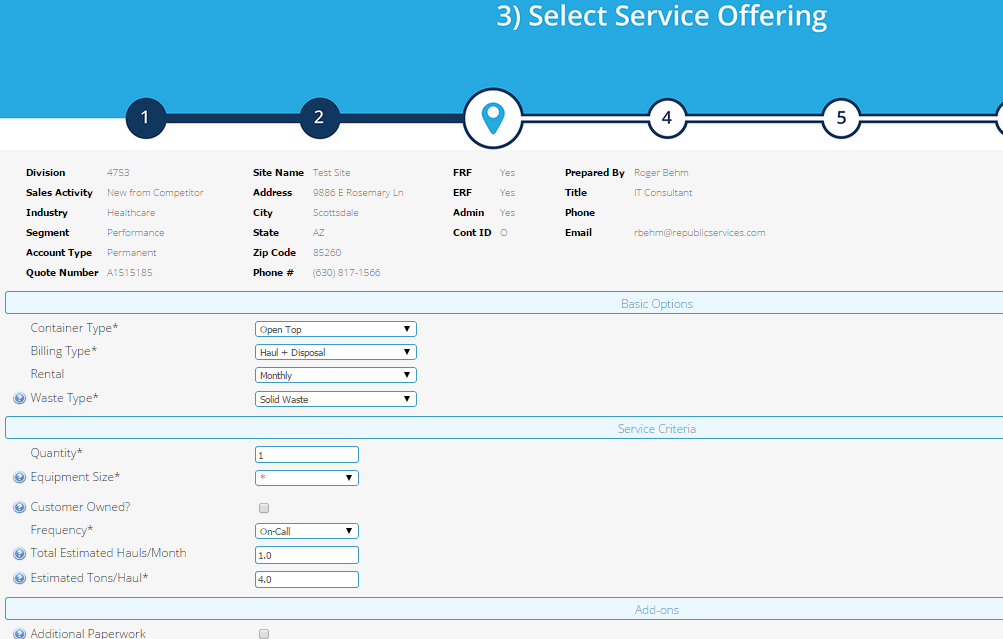


Figure ‑- Small Container Config



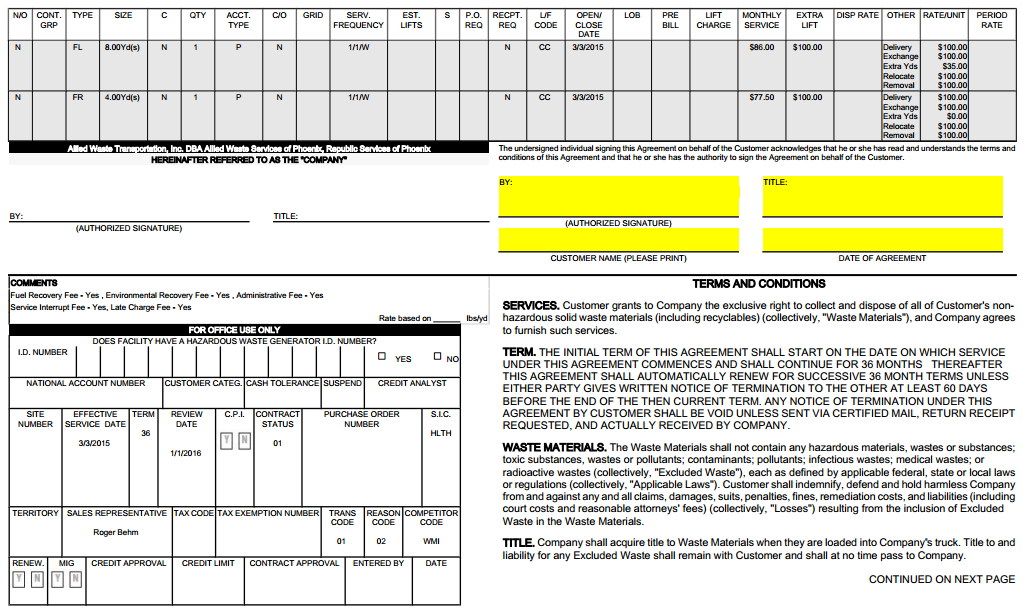
Add competitor (figure 3.2) field to New/New Small here

Figure ‑- Large Container Config



Add competitor field to New/New Large here

Figure ‑- Office Use CSA



Replace PERIOD RATE column heading with TC/RC CMP.

For each line item, include applicable transaction/reason codes and competitor code.

Make column visible only on the Office Use CSA.

Remove Trans Code, Reason Code, Competitor Code from Office Use Only section.

## 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

1. This change also moves three tags, competitor code, transaction code and reason code, from the quote section to the line section within the XML.
   1. Summary of needed AAE updates: The three data elements (competitor code, transaction code and reason code) which are being moved from the quote to the line level which will require new tags. AAE will need to remove the mapping from the quote level tags and add the mapping for the new line level tags.
   2. Open Questions:
      1. What are the new tag names?
      2. Confirm the values will be at the line level in the document type 2 sections.
      3. Confirm the same tags will be used for both small and large containers to hold the three data values.
      4. Confirm the tag values will continue to be the 3 letter competitor code and two digit transaction code/reason code rather than a name or other value?
      5. In the design document it is noted that if it is a multiple competitor quote the additional transaction/reason codes will be placed in the comments section. Please confirm this will be a display only move and that the additional codes will still go into the new line level transaction and reason code tags. Same question applies to the competitor code if multiple are present.
   3. AAE Update Tasks:
      1. Remap the new tags – This will require updates by Tibco and the AAE development team. The development effort will be approximately 8 hours total.
      2. Testing to verify the new tag mapping. The testing can be in conjunction with normal Capture testing.
   4. Impact if AAE is not updated:
      1. The competitor, transaction code and reason code will always be blank and will require data entry for each container.

# Report Changes

No Changes

# Appendix