Requirements/Design Specification

**Capture/CRM Competitor Functionality**

**CR 13634**

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 |
| 3/9/2015 | 1.3 | Updates for service change | John Palubinskas |
| 3/10/2015 | 1.4 | Updated TDR-004 based on design review | John Palubinskas |
| 3/27/2015 | 1.5 | Updated BFR-004 TBD answer | John Palubinskas |
| 4/1/2015 | 1.6 | Added section 5.1 addendums for post review meeting changes | John Palubinskas |
| 4/6/2015 | 1.7 | Added logic for enforcing decision (outlined in BFR 01) of New/New or New from competitor. | Roger Behm |
| 4/9/2015 | 1.8 | Added addendum regarding trans/reason codes being consolidated on the CSA. | 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.  - The first entry should always be “New/New” distinguishing that this business was not acquired from a competitor.  - A validation rule should be created forcing the user to selected something prior to moving to the pricing page.  - Help text should assist the user determine when to choose a value from the competitor list. |
| Pricing | - On the Start New quote page, the Sales Activity types should be: New, Existing Customer, and Change of Owner  - 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.    The trans/reason and competitor code boxes will be removed from the office use CSA.  We need to will display a line item on a Close Account or Close Site CSA, in order to display the trans/reason codes for those activities. |
| Service Change | For existing customers, competitors are used in:   * Rate Adjustment – Rollback due to Competitve Bid * Close Container Group – 02 – Lost to Competitor * Close Container Group – 56 –Competitor Pricing   As each of these items is reported on at the quote level, the same competitor attribute will be used and the appropriate transaction/reason codes will be copied to the corresponding container line level attribute.  For a service change, to determine the trans/reason code, we will look at the units before and after to tell whether it should be coded as a 02-58 (service increase) or a 05-58 (service decrease.)  TBD: what do we code if overall units do not change, but service levels are adjusted? (Brittany waiting on confirmation from STR reporting)  3/27/2015 Per Brittany, code as 02-58.  For a Close Account or Close Site, the appropriate trans/reason code will be copied to the line item level for all containers on the quote. |

### 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 * Replace the Sales Activity ‘New/New’ with ‘New’ * 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’). * Modify all commerce functions that refrerence ‘New/New’ as needed   **Finalize Quote Page**   * For Opportunity Status ‘Close Account’ and ‘Close Site’, the quote level transaction code, reason code and competitor code will be copied to the line item of the container used to create the quote. |
| 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 populated for the Office Use CSA; blank otherwise. * Populate the updated line item column with the transactionCode\_line, reasonCode\_line, competitorCode\_line * For the Office Use CSA box, the fields TRANS CODE, REASON CODE, COMPETITOR CODE should be removed completely and blanked out.   **Proposal**   * No updates   **Sample Invoice**   * No updates |
| InfoPro Interface | **Added Attributes**   * transactionCode\_line – 2 character transaction code * reasonCode\_line – 2 character reason code * competitorCode\_line – 3 character competitor code * competitorFactor\_line – float value containing the competitor adjustment factor (no Infopro impact as they do not consume this attribute)   **Retired Attributes**  For this release, we will populate the existing attributes below with the corresponding line item attributes from the first line item. Note that this is temporary. In a future release, these attributes will be retained but blanked out.   * transactionCode\_quote * reasonCode\_quote * competitorCode\_quote * competitorFactor\_quote |
| 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 * The R ETL process needs to be modified to populate the region column. * The R ETL process should validate all Competitor\_Cd values against what is in InfoPro before populating div\_competitor\_adj. Check against BI DWCORE.Dim\_Competitor. This should prevent invalid competitor\_cd value within Capture. |

# Assumptions

The following items are out of scope:

* Close Account and Close Site functionality on last page will remain the same with quote level values continuing to be populated as is. In the case where we are not closing an account or site, those fields should be blank.

The following items are identified as risks related to these competitor changes:

* SFDC integration

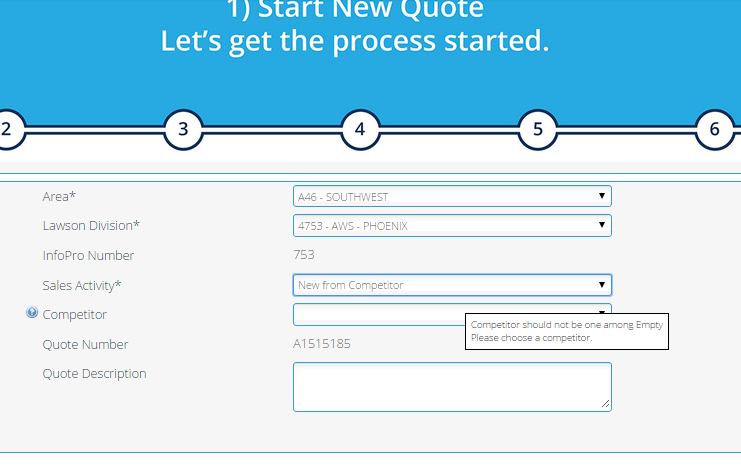
# Technical Design

## Referenced Documents

None

## Process Flow and Mock Ups

Figure 3‑1- Start New Quote Page Updates



Remove:

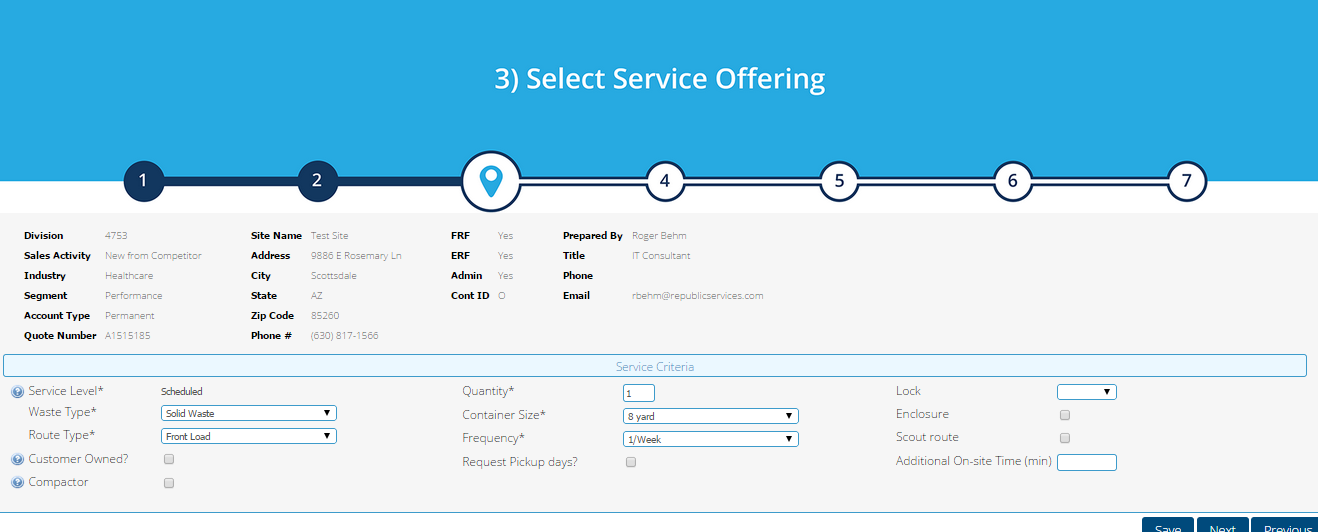
* “New from Competitor” option from Sales Activity field
* Competitor Field
* Validation Rule

Rename “New/New” to “New”

Figure 3‑2 - Competitor dropdown

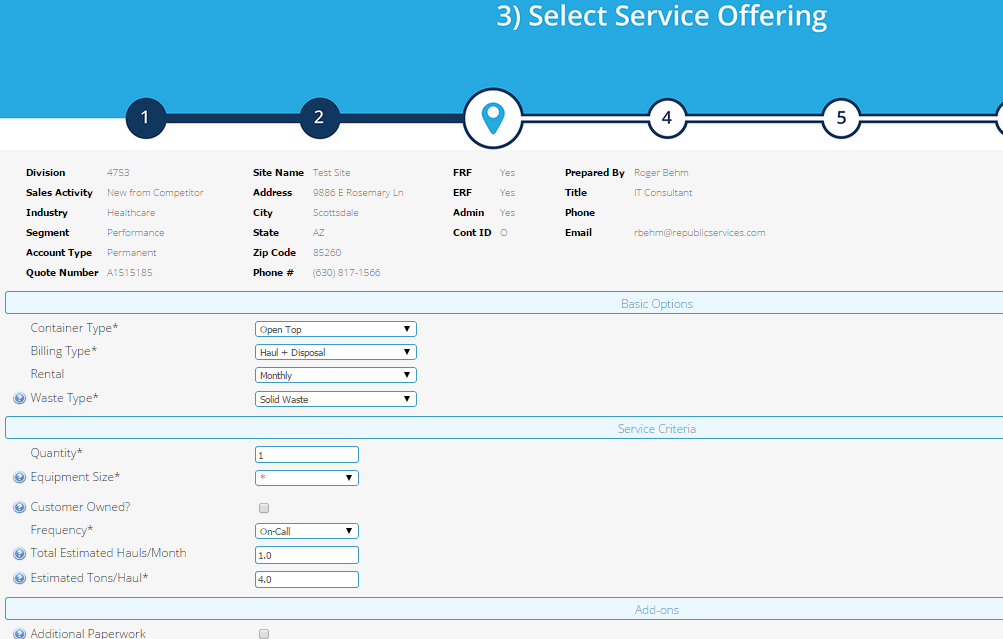


Figure 3‑3- Small Container Config



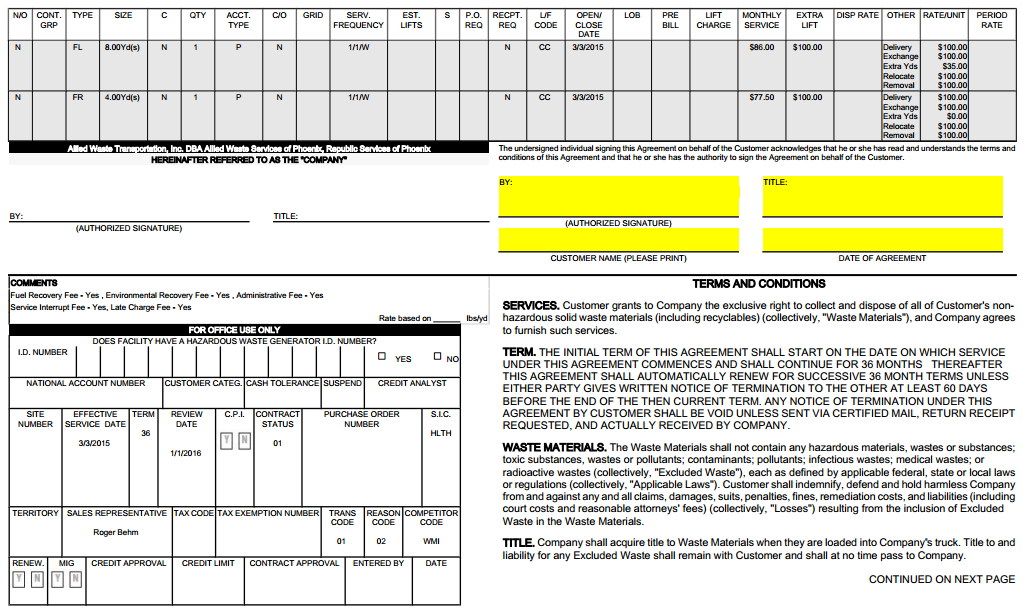
Add competitor (figure 3.2) field to New/New Small here

Figure 3‑4- Large Container Config



Add competitor field to New/New Large here

Figure 3‑5- Office Use CSA



Quote level Trans Code, Reason Code, Competitor Code will removed.

Replace PERIOD RATE column heading with TC/RC CMP.

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

Populate fields only on the Office Use CSA.

## 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

## Design Specification Addendums

Design Specification addendums that were needed after the design review meeting were held:

* The quote level competitor is shown on the approval email. With competitor moving to a line level attribute, update the approval email to show any competitors as a comma delimited list of competitor names.
* competitorFactor\_quote will move to the line level as well. New attribute competitorFactor\_line will be created and included in output XML. Infopro does not need this attribute.
* Moving the transaction/reason codes to the line level resulted in additional changes to how they’re processed. Per Brittany, even though we have the ability to set codes at the individual container level, we need to show them on the CSA with a consolidated trans/reason code, even if that means overwriting some line level trans/reason code data. For example, if an existing customer chooses ‘close container group – service issues’ for one container (a 04-18), and then also chooses to add another container (02-58) on the same quote, we should overwrite the 04-18 with 02-58 if the net units calculated for the two container groups is positive, or a 05-58 if it is negative.

My original development was based on using the actual line item trans/reason codes without consolidating them on a per quote basis, so the setTransactionCode commerce function will be updated to implement that requirement.

Additionally, this resulted in a new GitHub issue #512 Service Change vs Lost Account, requesting changes that will change the ‘close container group’ to be ‘lost account/site’, and properly put the current ‘close container group’ functionality as a Service Change. Mark gets numerous support tickets around the existing functionality.