Requirements/Design Specification

**Large Container Disposal Changes: Support for Additional Waste Types and Billing Methods**

Revision History

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| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 10/30/2014 | 1.0 | Initial Version with Requirements | Beckie Holmes |
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# Business Requirements

## Purpose of the Design Specification

This document highlights items to be implemented for Rate Restriction functionality. In order to get certain functionality to the users quicker, not all items will be implemented in this first iteration.

### Business Functional Requirements / Configuration

| **Business Functional Requirement** | **Notes** |
| --- | --- |
| Config Templates | Two digit price code must be added to the “disposal sites” tab in the configuration templates so that all disposal locations that appear in the disposal location list can be uniquely identified with Lawson-InfoPro division-lf code-price code  InfoPro division should be part of the lookup – UQID should use IFP-Lawson-LF-Price-Waste type-bill type |
| Config Templates | Small container CMCs may need to be modified to add the price code to use for commercial and industrial business to ensure that the correct costs/waste types are used for small container solid waste and to ensure that the appropriate LF and price codes are applied to the container groups |
| Config Templates | Configuration templates must be populated for all additional waste streams and billing methods to be added in each division. Market prices, cash cost, and I/C rates must be added for each waste type/billing metohod added to the CMC  Additional waste streams that will be allowable must be controlled using the InfoPro master list. Add validation to CMCs where possible |
| Config: Start New Quote | No changes |
| Config: Site attributes | No changes |
| 1. Additional Attributes (Finalize quote screen) | Special handling code will be auto-populated from waste type selected. This will display on the final (finalize) screen and will be editable by the rep. The list of special handling codes will be a drop down list that is defined by the InfoPro list |
| Commerce: New large container container groups | When adding a new large container (temp or perm, existing customer or new), the available waste types drop down will show all waste types that have been added to the CMC file  A new dropdown will be added with the UOM.  This box will operate with an ajax rule that is governed by the waste type+division selected. Allowable values are “By the ton, “By the yard” and “by the load”. No “Each” for now. This list should update with the disposal location chosen and not let the user proceed to the next screen until a valid billing method is selected for the disposal location + waste type chosen. |
| Commerce: New large container | Add “Haul only” and “Haul plus processing” (only available for certain sites?) rename for purposes of disposal? (need to understand more on what these mean) |
| Commerce: Config | Need to be able to have multiple container locations at one site (have the ability to denote a container location within a site)  Add container group level attribute: need name: “container description? Conainer notes?” Delivery notes and service notes are currently at the site level, not container group level… |
| Commere: Pricing Large Container | Disposal prices should be based on a lookup of: Lawson Division, InfoPro Division, Waste Type, UOM. The list of facilities in Commerce will be all that match the user-selected criteria above. The user will select one disposal location. There will be only one record returned on a lookup of Division, InfoPro Division, Waste Type, UOM and facility description. This is the cash cost, intercompany rate, and market rate that will be used for pricing large container. If a site has multiple prices for the same waste stream, this must be denoted in the facility description so that reps know which one to choose. |
| Commere: Pricing Small Container | Small container pricing will be based on a lookup of Lawson division, InfoPro division, zip code, and waste type. There should only be one record returned for each of these combinations. In the case where no record is returned, third party disposal rates should be used. It is to be assumed that the third party disposal rate for recycling is zero. |
| Generate Documents | Want to be able to copy a quote and update the billing information … for example want to be able to bid the same exact services to different “authorized by” and billing info…should be able to handle with existing functionality:  Open up authorized by field to be edited |
| Generate Documents | Industrial-specific marketing literature may need to be added – check eRac. |
| Commerce: cost calculations | Disposal cost calculations should be modified to look at the unit of measure   1. If unit of measure is “by the ton”, then disposal cost = cash cost/ton, price = market price per ton. (from CMC), monthly estimated disposal cost = cash cost\*tons/haul\*hauls/mo 2. If unit of measure is “by the yard” then disposal cost = cash cost/yard, price = market price per yard (from CMC), monthly estimated disposal cost = cash cost\* yards/haul (container size)\*hauls/mo 3. If unit of measure is “by the load” then disposal cost = cash cost/load (from cmc), monthly estimated disposal cost = cash cost\*hauls/mo 4. The disposal portion of flat rates work the same as the above |
| Commerce: cost calculations | Cost calculations should support a negative cash cost, I/C rate, and market rate.  Line item disposal below floor rule applies (i.e. if disposal market price is -$10, -$11 would require approval) |
|  | Put spread between guardrails for disposal price  Spread should be a division-specific percentage between floor and average and average and target. Default to 5%, 5%. This percentage applies to all disposal rates if haul+disposal is chosen as an option, but not to flat rate, where margins are applied to prices. |
| Commerce: Commission | Commission formulas are unchanged, but if an additional waste category is added (i.e. C&D), calculations should support paying on this category (check we used waste category not waste type in commission table) |
| Commerce: Line item grid | The line item grid should display the waste type and the billing method in the description for the disposal line. The billing method on the disposal line should read “Per load”, “Per Yard’ or “Per ton” in the far right column |
| 1. Existing Customer | Existing customers adding a new large container will be treated exactly the same as new customers. |
| Documentation: Proposal | The proposal should list the waste type selected and show the unit of measure. The monthly summary should display the estimated monthly amount as described in BFR-0014: |
| Documentation: Sample Invoice | The sample invoice should show the correct billing method and waste type description |
|  | Add marketing materials options (C&D)…these should appear always |
| Documentation: CSA | The CSA should show the correct LF and price code for the waste stream and disposal site selected. The special handling code should appear on the CSA for non MSW and recycling waste types |
| 1. Approvals | No changes to approvals |
| 1. Flipping quotes | No impact on flipping quotes |
| 1. Reporting | The billing method and waste type may need to be brought into the reporting template |
| Finalize Quote | No impact |
| 1. InfoPro | Do we/are we sending UOM ? Can they receive the price code? |
| 1. AAE | AAE changes – reqs needed |

### Technical Design Requirements

| **Technical Design Requirement** | **Notes** |
| --- | --- |
| Config Templates | See below for necessary modifications to “Disposal Sites” tab and “Comm Disp by ZIP” tab. Proposal that we eliminate “Comm DSP by site” through this change and manage both commercial and industrial pricing on the “disposal sites” tab |
| Config: Waste Types |  |
| Config (Select Service Offering) page |  |
| Commerce |  |
| Documentation   * CSA * Proposal * Sample Invoice | None |
| InfoPro Interface | AAE must be modified to accept price code in addition to LF code, special handling code if that is added  AAE must be modified to accept different charge code/method on large container |

# Assumptions

The following items are assumptions are out of scope:

Special waste other than that billed by the yard, by the ton, or by the load with a per ton disposal cost and market rate for the waste type that the division defines in their configuration file

# Technical Design

* Determine if service notes and delivery notes need to be moved to container group attributes or if an additional attribute needs to be added for container group service/delivery notes. Determine impact on AAE
* Add a container group attribute that is a description (first line of container notes). Should this description be visible to customer on proposal?
* Special handling code: we default and make overridable by the rep

## Referenced Documents

None

## Process Flow and Mock Ups

### Changes to the CMC

* Write VBA program to modify placemats for structural changes…analyst review needs to be done to update data

#### Disposal Sites Tab

* Add “is commercial flag and is\_industrial to “Disposal sites tab”,
* Default all solid waste, OCC/REC sites to 1 for is\_commercial
* Default all sites to 1 for is\_commercial
* lookup in the CMC file points to the disposal sites tab
* Add price code to comm dsp by zip tab
* Remove 3rd party and change logic so if Lawson # is missing, assume 3rd party
* Rename waste type to waste code
* Rename waste description to waste type
* Remove lat/long
* Remove final cost and final I/C rate

#### Market Specs Tab

* Remove accepted waste streams from market specs…take all waste streams from “is\_commercial flag…if waste stream not designated as is\_commercial, wont show up on the list.

#### Other Tables

* Ensure peak season table, margin tables, commission tables all existing customer tables map to waste category not waste type

### Waste types to add

* Waste type list to come from InfoPro. See below for current list. If a division wants a waste type not on the list, it must be added to InfoPro before it can be added to Capture. The list should be sourced from InfoPro
* Waste category to be defined as below. If Recycling\_flag = 0 then Solid waste, otherwise, Recycling.

|  |  |  |
| --- | --- | --- |
| waste\_code | waste\_type | recycling\_flag |
| ALM | Aluminum | 1 |
| APL | Appliance | 0 |
| ASB | Asbestos | 0 |
| ASP | Asphalt | 0 |
| C&D | Construction and Demolition | 0 |
| CCR | Concrete | 0 |
| CON | Contaminated Load | 0 |
| DIR | Dirt | 0 |
| ELC | Electronics | 0 |
| FUR | Furniture | 0 |
| GLS | Glass | 1 |
| GRN | Compost / Yard Waste | 0 |
| GRV | Gravel | 0 |
| MAT | Mattresses | 0 |
| MPR | Mixed paper | 1 |
| MSW | Solid Waste | 0 |
| MTL | Metal | 1 |
| MXR | Mixed recyclables | 1 |
| OCC | OCC - Clean | 1 |
| P01 | Inert | 0 |
| P02 | Inert Box | 0 |
| PLS | Plastics | 1 |
| RCY | All in One - Single stream | 1 |
| ROF | Roofing | 0 |
| SLU | Sludge | 0 |
| SOP | Sorted Office Paper | 1 |
| SPC | Special Waste | 0 |
| SWL | Sorted White Ledger | 1 |
| TIR | Tires | 0 |
| WOD | Wood | 1 |

## 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).

## InfoPro Interface

N/A

# Report Changes

# Appendix

|  |  |
| --- | --- |
|  | Address doesn’t exist? Need a workaround….override with specific lat/long (can use cross street) |
|  | Approval process: have to wait for approvals –  Different approval process for temp vs perm on FRF waived  Deferred to future release |
|  | Communicate that can add multiple containers in capture… |

General questions

* On call customer wants 7 hauls a week …how to set up?