Requirements/Design Specification

**Feb2015 Emergency Fixes**

**CR 13598**

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 2/25/2015 | 1.0 | Initial Version with Requirements | Roger Behm |
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Table of contents

1 Business Requirements 6

1.1 Purpose of the Design Specification 6

1.1.1 Bug list for current release 6

2 Assumptions 7

3 Design 7

3.1 #437 Add Divisions to Northwest Area 7

Issue 7

~~3.2~~ ~~#436 Create additional Actions to Send XML to TIBCO~~ 7

~~Issue~~ 7

3.3 #432 Div 3010 CSA Missing Ts & Cs 8

3.4 #431 Capture Using contract Expiration Date Instead of Automatic Term Rollover Date 8

3.5 #430 Approval Email shows competitor Field When No Competitor was Chosen 9

3.6 #429 Validation Error When Customer Rejected Option Selected 9

3.7 #427 Compactor ROA Errors for Industrial Containers 9

3.8 #418 Proposal Errors When Doing an Assign and Claim Ownership 10

Issue 10

3.9 #404 CSA Not Showing Ts & Cs for Non P or T Account Types 10

3.10 #397 Trans/Reason Code for Change of Owner is Incorrect 10

3.11 #395 Renewal Term Choices Not Same for Two Divisions – placemats and table are correct 11

3.12 #390 Correct Verbiage of Rollback language on competitive Bid Amount Message 11

Issue 11

3.13 #383 Compensation Credit Should be Granted to Reps If Any Fee Area I Not Charged By The Division 12

Issue 12

3.14 #372 Existing Customer Displaying EOW Instead of 1/2/W 12

3.15 #315 Division 4959 – CSA Ts & Cs Do Not Have Spaces Between Paragraphs 12

Issue 12

3.16 #288 CSA Shows Compactor of “Y” When Not Multiple Containers May Not All Be “Y” 13

Issue 13

3.17 #279 Total Desired Price Allows Negative Numbers 13

Issue 13

3.18 #53 Add Yellow High-Light To Signature Section of CSA 13

Issue 13

4 InfoPro Interface 14

5 Report Changes 14

6 Appendix 14

# Business Requirements

## Purpose of the Design Specification

This document highlights items to be fixed and implemented for the titled release.

### Bug list for current release

| GitHub Item  Number | **Description** |
| --- | --- |
| [437](#E_437) | Add divisions to Northwest Area |
| [~~436~~](#E_436) | ~~Create Additional Actions to send XML to TIBCO~~ |
| [432](#E_432) | Div 3010 CSA missing Ts&Cs |
| [431](#E_431) | Capture using contract expiration date instead of automatic term rollover date |
| [430](#E_430) | Approval email shows competitor field when no competitor was chosen |
| [429](#E_429) | Validation error when customer rejected option selected |
| [427](#E_427) | Compactor ROA errors for industrial |
| [418](#E_418) | Proposal errors when doing an Assign and Claim Ownership |
| [404](#E_404) | CSA not showing Ts&Cs for non P or T account types |
| [397](#E_397) | Trans/Reason Code for Change of Owner is Incorrect |
| [395](#E_395) | Renewal term choices not same for two divisions – Placemats and table are correct |
| [390](#E_390) | Correct verbiage of rollback language on competitive bid amount message |
| [383](#E_383) | Comp credit should be granted to reps if any fee area is not charged by the division |
| [372](#E_372) | Existing customer displaying EOW instead of 1/2/W |
| [315](#E_315) | Division 4959 – CSA Ts&Cs do not have spaces between paragraphs |
| [288](#E_288) | CSA shows compactor of Y when not multiple containers may not all be Y |
| [279](#E_279) | Total desired price allows negative numbers |
| [53](#E_53) | Add yellow high-light to signature section of CSA |

# 

# Assumptions

NA

# Design

## #437 Add Divisions to Northwest Area

## Issue

Northwest is missing some divisions for rollout.

**Design**

Please add the following Divisions to Area 53 – Northwest through the existing A53 constraint rule.

* BU 407 - 4172 & 4197
* BU 404 - 4176 & 4183

**BI or InfoPro**

No impact. No additional fields or functionality added

## ~~#~~~~436 Create additional Actions to Send XML to TIBCO~~

## ~~Issue~~

~~BI will begin using the TIBCO feed because the current method of running several small reports and emailing each through Excel and pulling it from an email box is not sustainable. TIBCO currently only supports finalized quotes. Going forward TIBCO will also receive unfinalized quotes~~

**~~Design~~**

~~Bottom line is TIBCO will use an existing attribute isSalesFinalized\_Quote to determine if the XML should be sent to InfoPro. If the variable is set to “True” the XML will be sent. If not, InfoPro will not receive the XML. BI, will receive all XML Capture sends to TIBCO.~~

~~More detail can be found in design doc “Design Specification - Capture - BI\_Reporting\_Changes\_01” has been created~~

**~~BI or InfoPro~~**

~~No impact on InfoPro. BI ETL will need to be changed. Details in the design doc~~

## #432 Div 3010 CSA Missing Ts & Cs

**Issue**

The CSA for division 3010 is missing the Terms and Conditions

**Design**

There is an incorrect mapping in the "Region" column of the data table “CSACombo” for this particular division. Update the mapping. This table is not part of the weekly PDC. It will need to be migrated with planned site migration

**BI or InfoPro**

No impact. No additional fields or functionality added

## #431 Capture Using contract Expiration Date Instead of Automatic Term Rollover Date

**Issue**

Expiration date in Capture is being used to determine Existing Terms available in dropdown instead of auto rollover date. For example, Expiration date on a 36 month term is 7/31/12. Capture reads that date and does not have Existing Terms as an option, when the auto rollover would mean the expiration date is now 7/31/15 (auto rollover of 36 month term) and Existing Terms should be allowed.

Observations:

1) The existing terms as an option is visible in the drop down if it is more than 90 days but the logic in capture which rounds the existing terms value to an available term value in our system for cost calculation does not handle any terms more than 90 days and less than equal to 6 months.

2) Also, the bands which rounds off the existing term for cost calculation should do that only for cost calculation purposes but it is printing rounded existing terms values in the CSA.

3) The terms used to calculate "commission (part of cost)” for existing terms were the remaining months in the term. Not correct.

**Design**

1) Existing Terms option needs to be available to all existing customers irrespective of whether the days left in the contract are less than 90 or not.

2) Auto-renew customers need to be addressed in the new logic. For example if the quote creation date is > the original expiration date, the customer is considered auto renewed by the same amount of term as the original and existing terms.

3) Terms used to calculate commission (part of cost) in case of existing terms are the original total terms, not remaining.

**BI or InfoPro**

No impact. No additional fields or functionality added

## #430 Approval Email shows competitor Field When No Competitor was Chosen

**Issue**

The approval email shows the competitor WASTE MANAGEMENT even though the quote was for a Price Adjustment - Rollback of Current Price.

**Design**

It looks like config will default the competitor attribute to WASTE MANAGEMENT no matter the sales activity type. Add a new condition to the approval email code to check the price adjustment reason as well as the competitor attribute before displaying that line in the email.

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #429 Validation Error When Customer Rejected Option Selected

**Issue**

A validation error for an existing customer unsigned CSA is occurring when Customer Rejected CSA option is selected.

**Design**

Remove the CSA Rejected value from the Opportunity Status attribute within Commerce (finalized page)

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #427 Compactor ROA Errors for Industrial Containers

**Issue**

Compactor ROA is not being added into floor rental

**Design**

Current formula is:

Compactor floor rental = compactor value/compactor life + compactor value \* maintenance factor /12

New formula should be:

Compactor floor rental = compactor value/compactor life + compactor value \* maintenance factor /12 + ROA Compactor

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #418 Proposal Errors When Doing an Assign and Claim Ownership

## Issue

When you do an Assign and someone else claims ownership the Proposal shows the original users name and the new users (who claims ownership) email address.

**Design**

Changed the name to be printed from "preparedBy\_quote" to "quoteOwner\_quote" since the ladder gets updated upon ownership change

**BI or InfoPro**

No impact. No additional fields or attributes needed

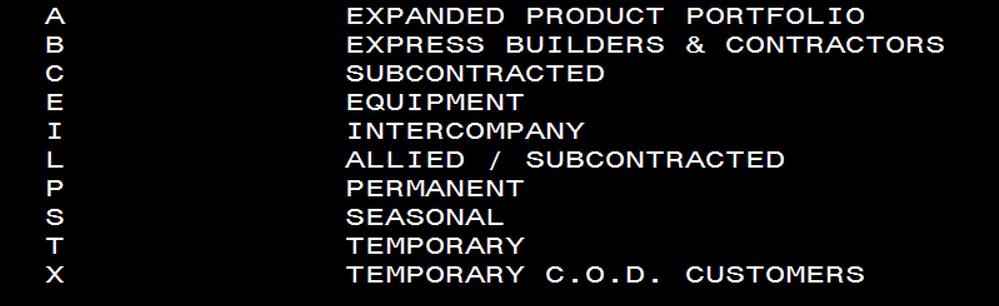
## #404 CSA Not Showing Ts & Cs for Non P or T Account Types

**Issue**

Ts&Cs not showing up because the logic is only looking for account types of P or T. In this particular case the account type is C.

**Design**

Allow for additional account types within the logic. Possible account types in InfoPro are:



**BI or InfoPro**

No impact. No additional fields or attributes needed

## #397 Trans/Reason Code for Change of Owner is Incorrect

**Issue**

Several issues reported

* The trans/reason code should be 04/11 for old owner and 01/11 for new owner. It is showing 01/02 for new owner CSA.
* Trans/Reason Code shows on Office Use only CSA as 02/02 instead of 02/58. It is loading the correct code into InfoPro
* Existing Customer, Rollback, Customer Accepted – SIGNED, Trans/Reason code is wrong on CSA 06/02. 02 is wrong.

Observation:

The bug isn't so much with the codes. In the case of Change of Owner, close account and close site options on finalize screen should not be available (e.g., it is not possible to close a new owner's account that doesn't even exist yet) In all the examples the rep either selected closed account or closed container with lost to competitor. This overrides the reason code with the reason code = "02".

**Design**

Created Constraint rule to constrain the Close Account and Close Site option if sales activity is "Change of Owner".

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #395 Renewal Term Choices Not Same for Two Divisions – placemats and table are correct

**Issue**

The dropdown Renewal Terms for Div 3752 has MTM, but Div 3614 does not have MTM.

Observations:

There is a constrain rule which constrains MTM for Perm quotes for certain divisions and 3752 is one of them. Also, there are a few other divisions which should be removed per Brittany.

* 3607 - SEABOARD WASTE
* 3614 - SWS COMMERCIAL
* 3639 – GAINESVILLE

**Design**

Deactivate the rule for the mentioned divisions

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #390 Correct Verbiage of Rollback language on competitive Bid Amount Message

## Issue

Competitive Bid Amount language is not consistent. Red text should note “Rollback of Current Rate(s)” as opposed to “Rollback of Current Price”.

**Design**

Change text as requested

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #383 Compensation Credit Should be Granted to Reps If Any Fee Area I Not Charged By The Division

## Issue

If a division is configured to not charge FRF, ERF or Admin, then the rep should get credit for any fee that is not allowed by the division. For example if division 7777 is not configured for ERF and Admin, the rep should automatically get credit for ERF and Admin. FRF credit should be determined if the quote includes FRF or not.

**Design**

Rebuild the logic within feeArray attribute within calcCommissions to check which fees the division charges. If the division does NOT charge the fee, it is automatically included as part of the commission calculation. If the divisions do charge the fee, we still need to check if that particular fee is part of the quote before including as part of the commissions calculation.

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #372 Existing Customer Displaying EOW Instead of 1/2/W

**Issue**

CSA wording for frequency is incorrect.

**Design**

CSA for no change within (GH ticket 372) shows 1/1/EOW. It should be 1/2/w.

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #315 Division 4959 – CSA Ts & Cs Do Not Have Spaces Between Paragraphs

## Issue

Division 4959 - CSA Version RCYOTH Franchise Ts & Cs formatting does not include spaces between the paragraphs like many of the other Ts & Cs documents

**Design**

Add the proper spacing between each paragraph

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #288 CSA Shows Compactor of “Y” When Not Multiple Containers May Not All Be “Y”

## Issue

For multiple containers the CSA displays compactor of “Y” for all containers when only a single may contain a compactor. The flag seems to be correct in InfoPro.

**Design**

In generate docs rework the logic that sets the compactor flag on the CSA

**BI or InfoPro**

No impact. No additional fields or attributes needed

## #279 Total Desired Price Allows Negative Numbers

## Issue

You can enter a negative number in the desired total price. After entering the negative amount and click the recalc fees button, a zero will show up in the desired total price and there will be a negative number in the pricing band price box.

**Design**

Create a new constraint in Commerce. Do not allow values < 0 for total price.

**BI or InfoPro**

No impact. No additional fields or attributes needed

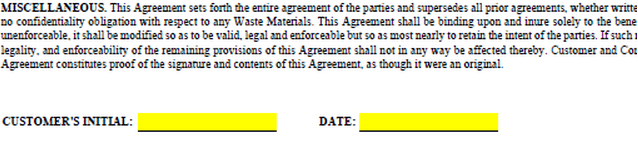
## #53 Add Yellow High-Light To Signature Section of CSA

## Issue

This item was derived from a task of creating the ability to high-light the second page of the CSA (initials section) similar to the signature lines on the first page.

**Design**

The second page of the CSA has an initials and date line. Please highlight the line on both similar to the first page signature lines.



**BI or InfoPro**

No impact. No additional fields or attributes needed

# InfoPro Interface

No new variable should be needed and no existing variables should be repurposed for any of the above changes.

# Report Changes

NA

# Appendix