Requirements/Design Specification

**Lead Source Code**

**GH 576 – CR 14071**

Revision History

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| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 5/15/2015 | 1.0 | Initial Version with Requirements | Roger Behm |
| 5/21/2015 | 1.1 | Design Revision Based CRM requirements | Roger Behm |
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New lead source codes are needed for the MDM project. Capture’s process to update the codes is manual change to a menu, there for a CR is needed. 6

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# Business Requirements/Owner – Ryan Golden

# New lead source codes are needed for the MDM project. Capture’s process to update the codes is manual change to a menu, there for a CR is needed.

# Assumptions

Values below already exist in InfoPro

# Design

Requirements

* Use existing attribute leadSourcCode\_quote
* Updated list for lead source (Figure 3.1) for non CRM generated quotes
* Determin if CRM generated the quote based on sourceSystem\_quote attribute
* Source leadSourcCode\_quote from CRM when quotes are coming from CRM (read only)
* Leave the lead source editable for audiefor quotes not generated from CRM
* Populate on CSA as normal
* Pass to AAE as normal

Figure 3.1

|  |
| --- |
| **LEGEND** |
| Add Lead Source Code & Description |
| Update Lead Source Description ONLY |
| No updates required |
| **LEAD SOURCE CODE** | | | | |
| **Lead Source Code** | **Lead Source Description** | **Description** | | |
| A | Business Card | Customer received a business card of an employee and called to obtain additional or new service | | |
| B | Click to Buy | Customer signed up for service through the online Click to Buy web channel | | |
| C | Customer Referral | Customer was referred to Republic Services by an existing customer, employee, family member, etc. | | |
| D | Direct Mail | Customer contacted Republic Services after receiving a direct mail piece | | |
| E | Refer Republic | Customer was a lead referred by our employee lead referral program | | |
| F | Phone Inquiry | Customer called in to inquire about new or additional services | | |
| G | Mobile App (My Resource) | Customer contacted Republic Services after seeing an ad for My Resource or is an existing customer and adds additional services through My Resource | | |
| H | HOA | Customer resides in an HOA that Republic Services provides service | | |
| I | Internal Referral/Sales | Customer was contacted directly by a Republic Services sales representative over the phone, in-person/door to door, or through email | | |
| L | Logo (Trucks/Containers) | Customer contacted Republic Services after seeing info displayed on one of our physical assets such as a container, truck or building | | |
| M | Municipal Contract/Franchise | Customer resides in existing Republic Services' municipal contract/franchise area and is contacting us to set up new service | | |
| N | National Accounts | Customer is a National Account | | |
| O | Other Advertising | Customer contacted Republic Services after seeing or hearing about us from a billboard, radio advertisement, on television, in a magazine, or other media outlet | | |
| P | 3rd Party Selling Agent | Customer aquired by 3rd party selling agent (includes door-to-door, over the phone or other sales channel) | | |
| Q | Acquisitions | Customer was added due to an acquisition | | |
| R | Republic Rewards | Customer contacted Republic Services through our republic rewards website, republicgivesback.com | | |
| S | Online Search/Web | Customer located and contacted Republic Services online using an internet search engine | | |
| T | Tradeshows/Industry or Networking Groups | Customer contacted us after seeing or hearing about us at a tradeshow or industry/networking event | | |
| U | Purchased List | Customer acquired through lead generated by a list purchased from marketing or another department (excludes Avention/OneSource/embedded data sources) | | |
| W | Website (republicservices.com) | Customer contacted Republic Services through one of our websites | | |
| X | Social | Customer contacted Republic Services after seeing or hearing about us from social media (i.e., Facebook, Twitter, Yelp, LinkedIn) | | |
| Y | Yellow Pages | Customer contacted Republic Services after seeing our advertisement in a yellow pages directory | | |
| Z | Others | Customer contacted us after seeing or hearing about us through a channel not listed elsewhere | | |

# InfoPro/TIBCO/BI Impacts

* None

# Report Changes

* None

# Appendix