**MAE / National Accounts Multi-Quote Tool**

Revision History

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| --- | --- | --- | --- |
| **Date** | **Revision** | **Description** | **Author** |
| 11/24/2014 | 1.0 | Initial Version with Requirements | James |
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# Business Requirements

## Purpose of the Design Specification

This document highlights items to be implemented for an external multi-quote interface to facilitate obtaining pricing information for major accounts (MAE) and national accounts. Currently, MAEs and National Accounts are unable to obtain full cost and pricing information from Capture since multi-site quotes are not possible with the existing interface. Additionally, for large numbers of sites with similar configurations, it would be very time consuming to complete the number of quotes necessary to fully price these accounts. National Accounts pricing may also have needs (weight adjustments or margin adjustments) that are not currently allowed within the existing Capture framework.

### Business Functional Requirements / Configuration

| **Business Functional Requirement** | **Notes** |
| --- | --- |
| 1. Batch quoting facility | The internal Capture engine will be capable of processing large volumes of quotes with minimal turn-around time. |
| 1. Input via Excel template | Users (MAEs and National Accounts Pricing Team) will have the ability to put quote inputs into an Excel template and submit that template for pricing via the internal engine. Data may be sourced from other Excel based templates (e.g., National Accounts current tool); however, integration between tools will be the responsibility of the user. |
| 1. Output in Excel | Users will be able to access completed quotes via Excel (either via CSV or an actual Excel doc). |
| 1. Integrated with Capture data | Pricing will use the most current data available (in sync with data loaded into Capture) |
| 1. Lines of business supported | Large container new, small container new and small container existing will be supported. Large container existing will be supported via separate enhancement. |
| 1. Disposal support | Additional waste streams and units of measure will be enabled (to the extent that data is available supporting new sites). |
| 1. Role based security | Specific employees will have access to the submission template based on role |
| 1. Configurability | NA users will have the ability to override weight and margin assumptions if desired. |

### Technical Design Requirements

*Not yet complete, will complete once functional requirments are approved.*

| **Technical Design Requirement** | **Notes** |
| --- | --- |
| 1. Input template will mirror Capture inputs | Order and possible values will mirror Capture inputs. Validation will be included wherever possible. |
| 1. New rows can be added and will pre-populate with default values | Defaults will be determined through stakeholder input as well as data indicating the most common values. |
| 1. Reps will have the ability to submit the file for batch processing | CSV exports will be prepared and dropped into a folder location for processing. |
| 1. Batch engine will look for new, unprocessed files | Batch engine will remain running at all times with the ability to send out a heartbeat notification as needed. The batch engine will look for new input files and import them into the engine. |
| 1. Imported data will be processed through the internal engine | Imported data will be translated and processed to calculate costs and guardrail pricing for the configurations specified. |
| 1. Batch engine will output data | Output will be to CSV or Excel format and include stakeholder determined information as well as the original requested configuration. |
| 1. Quotes will be stored | Quotes run through the system will be logged and stored with the ability to cross reference back to the original input docs. Data retention policies will be enforced. |
| 1. Integration with Bing Maps | Large container quotes will be submitted via Bing maps API to geocode site locations and disposal routes. Users will have the ability to specify the disposal location for each container group or accept a default (geographically closest) if left blank. |
| 1. Multi-site will be supported | Users can submit quotes for the same customer with multiple sites. Data will be aggregated and presented to the user indicating totals for the whole quote as well as providing container group level detail. |
| 1. Disposal units of measure other than “by the ton” will be supported | By the load, by the yard and by the ton will be supported if available in the configuration templates. |
| 1. Waste streams other than MSW, OCC, and RCY will be supported | Other waste streams (e.g., C&D, ASB, etc.) will be supported if available in the configuration templates. |
| 1. Lines of business will be supported | Large new, small new, and small existing will all be supported via separate tabs (since different inputs are required). Timing of large container existing will be dependent on a separate enhancement. |
| 1. Multiple quotes can be obtained | Users will be able to submit multiple quotes for the same site or account with different configurations. |
| 1. Reporting of quote information will be role specific | NA users may require different info (e.g., cost breakdown) from MAE. Specific MAE/NA stakeholders will determine output appropriate for their role. The submission tool will pull the NT user ID for the user and record that as part fo the submission. |
| 1. Disposal configurability | Examine feasibility of selecting disposal location based on closest existing accounts. |

# Assumptions

The following items are out of scope

* **Large Container Existing Quotes:** these will be handled via a separate enhancement.
* **Integration with other existing templates:** users (specifically National Accounts) will be able to construct translation tools that will translate values from existing tools into Capture-speak.
* **Approval process:** Users will continue to be responsible for obtaining appropriate approvals per existing LOA policies. This tool will provide sufficient data to enable decision making but will not replace the need for users to obtain approval via their current processes.
* **Paperwork process:** Users will need to use existing processes to fill in and file paperwork, including, but not limited to: CSA, proposal documents, marketing materials, etc.

# Technical Design

## Referenced Documents

TBD

## Process Flow and Mock Ups

TBD

## 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

N/A

# Report Changes

No Changes

# Appendix