***Business Reason***

Selecting “Existing Terms” to grab the initial and renewal terms from the previous contract from an existing customer

***Task Requirements***

Part 1: a) Create “Existing Terms” menu entry for both “Initial Term” and “Renewal Term” attributes

b) Create Constraint Rule to constrain “Existing Terms” when user selects “Change of owner,” “New from Competitor,” and “New/New”

Part 2: a) Calculate the remaining days from finding the difference between Expiration\_Dt and the current day.   
 - if remaining days = 1-90, then the option “Existing Terms” does not show  
 - If the existing term comes out to be within (- 2) months of a contract term length in the data table then pick contract\_dur\_factor and contract\_dur\_premium from that otherwise pick pick contract\_dur\_factor and contract\_dur\_premium from the lower contract term.

Example : Let’s say there are contract terms of 6,12,24,36 months in the data table and existing term for a quote comes out to be 10 to 21 months then pick contract\_dur\_factor and contract\_dur\_premium from 12 month contract, if it comes out to be 9 months or less but greater than 6 months then pick contract\_dur\_factor and contract\_dur\_premium from 6 month.

**The Initial Term in “Calculate Guardrails” “Larger Container Pricing” “Small Container Pricing” is grabbing the value from stringDict(set in pre-pricing), it should be more efficient to put all the calculation in pre-pricing so the existing months will carry through the other Utils**

Questions:

- Commerce lib “pre-pricing” , points to initialTerm in Util library “Calculate Guardrails”, draws contract\_dur\_factor from data table “Contract\_Dur\_Premium”

- Commerce lib “Printing” just print out the remaining months? If initial or renewal is one month, Line 443

- Util lib “Larger Container Pricing” – initialTerm\_quote = contractTerm, contractTerm affects commission, and then commission affect cts\_haul\_incl\_oh

- Util lib “Small Container Pricing” – same setup as Large container, affects commission, and ROI   
  
- How to go from different in days to different in months, just divide by 30?

***Build Plan***

Part 1:

* The attributes are Initial Term (initalTerm\_quote) and Renewal Term (renewalTerm\_quote)
  + Create “Existing Terms” menu entry for the two attributes.
* Create constraint rule with name “Existing Terms Constraint”
  + Condition – Attribute: “Sales Activity”, Operator: “=”, Value: “New/New” + “Change of owner” + “New From Competitor”
  + Action – Attribute: “Initial Term” + “Renewal Term”, Operator: “Constrain”, Value: “Existing Terms”
* Save
* Deploy Commerce
* Unit Test
  + Create quotes with Sales Activity = Existing Customers and one of “New/New”, “New from Competitor”, or “Change of owner”
  + Push quotes to Step 4: Provide Pricing to test if “Existing Terms” shows up accordingly.

Part 2

* Create new attribute “hiddenExisitingTerm” to feed in the months from the difference between Expiration Date and Current Date (actually this might not be needed)
* Create new attribute “existingTermFlag” to check if the remaining days is under 90 days
* Add attribute “existingTermFlag” to constraint rule “Existing Terms” as the condition, to constrain existing terms when the existingTermFlag is true(less than 90 days)
* Set up calculation for the existing term in pre-pricing:
  + Line 86: create variables for existing terms calc
  + Line 126: start calculations for remaining months

if sales activity = existing customer, BMQL call to Account Status data table and grab Expiration\_Dt base on infopro number, and site number

Change Expiration\_Dt from string format to date format, then find different between expiration date and today’s date. The difference in month is set to variable diffMth

* + Line 144: set up calculation for rounding of months

if diffMth is > 6 and <= 9 set dummy variable to 6  
 if diffMth is => 10 and <=21 set dummy variable to 12  
 if diffMth is => 22 and <= 33 set dummy variable to 24  
 if diffMth is > 33 set dummy variable to 36

* + Line 634: add in condition when initialTerm\_quote is Existing Term, set initialTerm to the dummy variable
* renewalTerm\_quote should be relatively the same, have the same setup as the initial term and the rest should follow.
* Check “printing” script, right now its conditioned to print “Month to Month” if initialTerm\_quote = 1, if not it will print initialTerm\_quote + “Month”. Perhaps change the code to grab initial term value from stringDict. Same situation for renewalTerm
* Deloy everything and test

***Admin Guide Changes***

***User Guide Changes***