***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 constraint “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

Questions:

1. The contract term length and division drive the contract\_dur\_factor based on the “Contract\_Dur\_Premium” data table. There are only a finite number of contract term lengths in the data table, how do we know which one to choose? Do we pick the closest one? Round up?

2. How do we want to go from a difference in days to months? Do we divide by 30 or 31? We need to have it in months because it affects things like commission for large and small container pricing.

3. Currently, we print “Month to Month” if the renewal or initial temrs 1 month, do we want to continue this practice?

Notes:

-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 attribute.
* 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 “hiddenExistingTerm” to feed in the months from the difference between Expiration Date and Current Date
* Wherever initialTerm\_quote and renewalTerm\_quote gets pull in, we do a check if they are equal to Existing Term (also applies to docs)
  + If not, same as usual
  + If yes, pull in new attribute
  + We will find all the places that is using the two att. with global search

***Admin Guide Changes***

***User Guide Changes***