* Use Finalized Margin Data for Revenue instead of Margin Trend Data
* Calculate the Target Gross Margin % on the form according to Paul’s formula
* Only users who have the *Contract* user role can delete a Client Log (keep history of deletes)
* Add District, Branch, SRID and Comments to the Excel Export of Client Logs
* Utilize the SAP imported data to value the FSC Discount Field – wait for new format
* Make sure users can only delete their own notes
* Add piece/shipment to Accessorials (10/22 meeting) Layout of SAP file will change
* Modify format of Report – one line per contract with Notes concatenated (10/22 meeting)

Came into Discussion After the Meeting:

Contracts would like to use the new system for routing: Contracts -> Pricing -> DM -> John DeMaio -> Darryl -> John Costanzo, followed by PDF docu-sign to Roz.

* Each person must choose the next person to route to (rollout and training issue)
* If the DM does not approve the changes, they need to route back to Pricing

This brings about the following changes:

* Only Pricing should be able to change any numbers
* Need the ability to add attachments for new contracts (BillApp, VDA, etc) – phase 2
* May need to add Beyond Charges – phase 2 or 3
* May need to Remove Accessorials from PDF (option)