Client Logs Meeting 9/12/18

As discussed in today’s meeting, the following changes will be made to Client Logs:

* Prefill the Current Margin Percent based on the Margin Trend data. Populate for selected contracts only, rather than Relationship level, if that data is readily available.
* When a renewal falls into two categories, for example both a modification and an upsell, the user should select Modifications and use the reason box to describe the changes. The reason text box will be visible for all types.
* The *Notes* function will be changed to replace the *Include in PDF Flag* with a drop down choice of *Internal Comments* and *Approval*. Only approvals will be included in the PDF/printed version.

*Adding the Approval option will allow routing to Daryl Knight and John Costanzo for pre-approval before beginning the docusign process. This will be the precursor to replacing docusign signatures from Daryl and John with the electronic approval acquired in the Client Logs interface.*

* Accessorials will be added in another tab. Eric will provide the data extract from SAP.

Accessorials included will be:

* Dims Air
* Dims Courier
* Resi Fees
* Fuel PI (shown as percentage)
* Fuel Puro Inc (shown as percentage)
* Dangerous Good (including 5 subcategories)
* Special Handling (including 6 subcategories)
  + Beyond Charges will be further analyzed, as there are nine different types with two categories each of *base* and *after weight.* Including all 18 fields will make the printed version of the contract very lengthy.