Coates needs: Have an app for their staff to create quotes for clients. Then an app/function for the hire (booking) of equipment. Initial Analysis For Coates Hire's demo system to allow staff to create quotes and hire equipment (i.e., process bookings and sales), the L1 (Level 1) and L2 (Level 2) processes can be broken down as follows. These follow standard business process hierarchy formats suitable for enterprise delivery and align with EE's structured methodology. 🔹 L1 Processes (End-to-End Major Capabilities)

1. Customer & Job Identification
2. Quote Management
3. Hire Booking & Order Fulfilment
4. Asset & Availability Management
5. Pricing & Discount Application
6. Contract & Terms Management
7. Delivery & Pickup Coordination
8. Billing & Invoicing
9. Customer Communication & Support
10. Reporting & Analytics
11. Audit & Compliance 🔹 L2 Processes (Sub-Processes per L1)
12. Customer & Job Identification • 1.1 Search existing customers • 1.2 Create new customer records • 1.3 Link customer to job site/project • 1.4 Capture job-specific requirements
13. Quote Management • 2.1 Initiate quote request • 2.2 Select equipment and services • 2.3 Apply rates and discounts • 2.4 Validate availability and lead times • 2.5 Review and approve quote • 2.6 Send quote to customer
14. Hire Booking & Order Fulfilment • 3.1 Convert quote to hire order • 3.2 Select equipment source (branch/yard) • 3.3 Allocate equipment for delivery • 3.4 Confirm hire schedule (start/end date) • 3.5 Apply deposit or pre-approval
15. Asset & Availability Management • 4.1 Check real-time equipment availability • 4.2 Flag equipment under maintenance • 4.3 Manage fleet assignment rules • 4.4 Substitute unavailable assets
16. Pricing & Discount Application • 5.1 Apply standard pricing rules • 5.2 Override price (with approval) • 5.3 Apply customer-specific pricing agreements • 5.4 Include bundled or promotional discounts
17. Contract & Terms Management • 6.1 Generate rental agreement • 6.2 Capture terms and conditions • 6.3 Capture digital signature/approval • 6.4 Store documents in CRM/ERP
18. Delivery & Pickup Coordination • 7.1 Schedule delivery to site • 7.2 Track transport dispatch • 7.3 Schedule pickup or off-hire • 7.4 Update asset location/status
19. Billing & Invoicing • 8.1 Trigger billing cycle • 8.2 Validate meter/hours if needed • 8.3 Generate invoice • 8.4 Apply credits or penalties • 8.5 Send invoice to customer
20. Customer Communication & Support • 9.1 Notify on quote/hire status • 9.2 Answer customer queries • 9.3 Manage booking amendments • 9.4 Record customer feedback
21. Reporting & Analytics • 10.1 Quote-to-hire conversion metrics • 10.2 Equipment utilisation tracking • 10.3 Revenue and margin analysis • 10.4 Staff performance dashboard
22. Audit & Compliance • 11.1 Capture approvals and overrides • 11.2 Log changes to quote/hire/order • 11.3 Ensure regulatory documentation • 11.4 Archive for audit trail Let me know if you'd like this structured into a Word or Excel format for the Coates demo or expanded into L3/L4 workflows, UI mockups, or AI-enhanced process suggestions.

Here is a list of user journeys for the Coates Hire quoting and hiring system. These journeys reflect the typical flow of tasks a staff member (and optionally customer) would experience in the process of quoting, booking, and managing equipment hire. 🔧 Primary User Journeys

1. Quick Quote Creation For walk-in or phone enquiry • Start new quote • Search or create customer profile • Enter job/site details • Add equipment and hire duration • Check availability • Apply standard or custom pricing • Save or send quote to customer • Optionally convert to booking

2. Project-Based Hire Booking For large or repeat customer jobs • Retrieve existing customer/project • View pricing agreements (if any) • Add multiple equipment types • Apply bundled pricing or volume discounts • Schedule delivery per item • Confirm contract terms • Review and finalise booking • Capture approvals and send confirmation

3. Availability-First Quote Driven by asset constraints • Input job and hire window • System shows available equipment • Select assets from availability pool • Generate quote from asset pool • Confirm pricing • Reserve equipment temporarily (soft hold) • Submit for approval

4. Quote Follow-Up & Conversion After a quote has been sent • Search or list open quotes • Review customer feedback • Update equipment or pricing if required • Re-issue quote or convert to booking • Notify customer of booking confirmation

5. Booking Amendment For changes to active or upcoming hire • Retrieve existing booking • Adjust hire period or equipment • Check impact on pricing or availability • Recalculate charges • Update delivery/pickup details • Send updated contract to customer

6. Contract and Compliance Check Required for regulated jobs or large clients • Generate contract from booking • Attach site-specific terms or compliance docs • Capture internal approvals • Send for digital signature • Archive signed agreement

7. Asset Dispatch and On-Hire Logistics and fulfillment flow • Confirm delivery address and date • Assign equipment to transport • Mark asset as "In Transit" • Confirm delivery and update status to "On-Hire" • Trigger billing start

8. Off-Hire and Pickup When customer no longer needs asset • Receive off-hire request • Schedule pickup • Update asset status to "Off-Hire" • Recalculate final hire charges • Trigger final invoice

9. Customer Support Interaction Handling issues or questions • Search booking or quote • Review notes or activity log • Respond to customer via preferred channel • Escalate if necessary (pricing, asset issues) • Update record with resolution

10. Performance and Activity Reporting Used by branch managers or team leads • View team quote-to-hire conversion rate • Track equipment utilisation • Identify frequently amended bookings • Export hire history by customer/project • Flag any anomalies for investigation Let me know if you'd like any of these detailed into screens, agent flows (for EE delivery), or mapped into a visual customer/staff journey map.

Here's a list of anticipated integrations for the Coates Hire quoting and hiring system, broken into logical categories. These reflect what would be expected in an enterprise-grade solution and align well with EE methodology for delivery. 🔌

1. Customer & Identity Systems

Integration Purpose CRM (e.g., Salesforce, Dynamics 365) To fetch existing customer profiles, contacts, and account history Single Sign-On (SSO) / Identity Provider Staff

authentication (e.g., Azure AD, Okta) Customer Self-Service Portal (optional) To allow customers to access quotes, bookings, and past invoices

2. Asset & Inventory Systems

Integration Purpose ERP / Asset Management (e.g., SAP, Oracle, Infor) To check availability, maintenance status, and asset location Fleet Telematics & GPS Systems Track asset delivery, utilisation, and pickup Maintenance Management System Exclude assets under repair or inspection from quotes

3. Pricing & Contract Management

Integration Purpose Pricing Engine / Rules Engine Apply dynamic pricing, promotions, volume discounts Contract Management System (e.g., DocuSign CLM) Store signed agreements, versioning, approval workflows eSignature Platform (e.g., DocuSign, Adobe Sign) For digital approval of quotes and contracts

4. Order & Hire Execution

Integration Purpose Hire/Booking System (internal) Core system to create, amend, and track bookings Delivery & Dispatch Systems Schedule and manage transport of assets Barcode/RFID Scanners Track physical handovers and returns of equipment

5. Finance & Billing Systems

Integration Purpose ERP Finance Module (e.g., SAP FI, Oracle Financials) For invoicing, revenue recognition, and financial reporting Payment Gateway (e.g., Stripe, PayPal, BPoint) For upfront payments or deposits Credit Check / AR Systems Check customer creditworthiness before approval

6. Communication & Notifications

Integration Purpose Email & SMS Providers (e.g., SendGrid, Twilio) To send quote confirmations, booking updates, and alerts Customer Notification Hub Centralise outbound communications across touchpoints Call Centre System (e.g., Genesys, NICE) Integrate with support or escalation flows

7. Analytics & Reporting

Integration Purpose BI Tools (e.g., Power BI, Tableau, Qlik) Visualisation of bookings, revenue, conversion rates, asset utilisation Data Warehouse / Lake (e.g., Snowflake, Azure Synapse) Consolidate data across systems for advanced insights Audit Trail / Logging Systems Full traceability for compliance and QA reviews

8. Compliance & Security

Integration Purpose Document Management System (e.g., SharePoint, M-Files) Archive of signed contracts, delivery dockets, compliance documents Audit & Monitoring Tools Track user activity and changes to quotes/bookings Policy Engines (e.g., ABAC/RBAC) Control feature access and business rules by user role/context

If you're planning to show this to a client (e.g., Coates or Infosys stakeholders), I can turn this into a visual integration map or system architecture diagram. Would you like that?

For a company like Coates Hire operating in the Australian equipment rental and services industry, the legal and regulatory drivers span across safety, contract law, privacy, finance, and environmental compliance. These are critical to consider when

designing or delivering a quoting and hiring system. Here's a breakdown aligned to L1 business impact: 🟦 1. Workplace Health & Safety (WHS) 🟦 Legislation: • Work Health and Safety Act 2011 (Cth and State variants) • Chain of Responsibility (Heavy Vehicle National Law) 🟦 Implications: • Assets provided for hire must be in a safe and working condition. • Systems must support pre-hire checks, inspection records, and operator safety information. • Staff and customer interactions must capture evidence of duty of care being upheld. 🟦 2. Consumer & Commercial Law 🟦 Legislation: • Australian Consumer Law (ACL) (under the Competition and Consumer Act 2010) • Contract Law (Common Law & Uniform Commercial Code concepts) 🟦 Implications: • Clear and accurate disclosure of pricing, inclusions, exclusions. • Enforceable digital contracts and hire agreements. • Processes for cancellation, refund, and dispute resolution must comply with ACL. • Clauses regarding damage liability, insurance, and hire conditions must be fair and non-deceptive. 🟦 3. Privacy & Data Protection 🟦 Legislation: • Privacy Act 1988 (Cth) and Australian Privacy Principles (APPs) • Notifiable Data Breaches (NDB) Scheme 🟦 Implications: • Customer and job site data must be stored securely and only used for stated purposes. • System must allow for consent capture, data minimisation, and access control. • Data breach notification workflows may need to be built in. • If integrating biometrics or telematics, ensure Privacy Impact Assessments (PIAs) are conducted. 🟦 4. Financial Compliance 🟦 Legislation: • Corporations Act 2001 • Australian Accounting Standards (AASB) • Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (if payments accepted) 🟦 Implications: • Booking and invoicing systems must ensure accurate financial records, tax (GST) application, and compliant invoicing. • If accepting payments, PCI DSS compliance is expected. • Integration with financial systems must meet auditability and traceability standards. 🟦 5. Transport & Environmental Regulation 🟦 Legislation: • Heavy Vehicle National Law • State-based Environmental Protection Acts • EPA Equipment Emission Standards 🟦 Implications: • Fleet dispatch and logistics must align with heavy vehicle compliance rules (fatigue, weight, route). • Some job sites may require environmental impact disclosures, noise and emissions records. • Hire contracts should include EPA-compliant usage instructions where applicable. 🟦 6. Digital Signatures & Records 🟦 Legislation: • Electronic Transactions Act 1999 • State-specific Electronic Transactions Regulations 🟦 Implications: • Quotes, contracts, and approvals can be digitally executed, provided systems ensure authenticity and audit trail. • Record retention policies must be met (e.g., 7 years for financial or contractual documents). 🟦 7. Industry-Specific Guidelines 🟦 Examples: • Hire & Rental Industry Association (HRIA) Code of Conduct • Australian Standards (AS/NZS) for specific asset classes (e.g., scaffolding, lifting) 🟦 Implications: • Systems must allow traceability of compliance with industry codes and standards. • May require tracking training/licensing of operators or site-specific equipment compliance. Would you like this turned into a compliance checklist, an AI validation agent spec (to check each quote/order), or integrated into your EE delivery quality gates?

Below is a comprehensive and detailed User Requirements Specification (URS) for Coates Hire's quoting and hiring system. It is structured across functional and non-functional categories and is enterprise-grade, aligned with EE's delivery quality gates and enabling future AI agent integration. 🟦 Coates Hire – Quoting & Hiring System User Requirements Specification (URS) 🟦 1. Overview This system enables staff to: • Create and manage quotes for equipment and service hires. • Convert quotes into bookings. • Fulfil, modify, and track the full hire lifecycle. • Ensure compliance with legal, safety, and financial standards. Users include: • Hire Coordinators (Branch staff) • Account Managers (Sales) • Logistics/Dispatch Staff • Finance & Billing Team • Compliance/Audit Team • Customers (optional self-service) 🟦 2. Functional Requirements 2.1 Customer Management ID Requirement Priority F1.1 Search

for existing customer by name, ABN, email, or contact ID High F1.2 Create new customer with required fields: company name, contact, billing info, job site High F1.3 View customer's hire history, active bookings, quotes, and contracts High F1.4 Capture customer-specific pricing agreements and tax exemptions Medium

2.2 Quote Management

ID Requirement Priority F2.1 Create a new quote with multiple equipment items and services High F2.2 Auto-populate standard pricing based on product and customer type High F2.3 Allow manual pricing overrides with reason and manager approval High F2.4 Apply promotions, bundles, and volume discounts Medium F2.5 Check real-time availability of assets before quote finalisation High F2.6 Save quote as draft or submit to customer via email/SMS High F2.7 Store all quote versions and changes with timestamps and author High

2.3 Booking & Hire Lifecycle

ID Requirement Priority F3.1 Convert quote to confirmed booking High F3.2 Allocate equipment based on availability, location, and transport time High F3.3 Specify hire start and end dates, delivery/pickup schedule High F3.4 Support partial bookings (e.g., some items confirmed, others pending) Medium F3.5 Allow extensions, early off-hire, or cancellation with rules and approvals High F3.6 Link contract and T&Cs to booking High

2.4 Asset & Inventory Integration

ID Requirement Priority F4.1 View live asset availability across branches High F4.2 Exclude assets under maintenance or reserved High F4.3 Assign equipment to a job with tracking of location and usage High F4.4 Suggest alternate or equivalent equipment if preferred item unavailable Medium

2.5 Logistics & Dispatch

ID Requirement Priority F5.1 Schedule delivery and pickup windows High F5.2 Integrate with dispatch management and GPS tracking High F5.3 Print and email delivery dockets and handover documents Medium F5.4 Update asset status to "on-hire", "off-hire", "returned" High

2.6 Contract & Signature

ID Requirement Priority F6.1 Generate contract with linked quote and terms High F6.2 Support e-signature via integrated provider (e.g., DocuSign) High F6.3 Store signed contract securely and link to job record High F6.4 Maintain audit trail of document versions and signatures High

2.7 Billing & Finance

ID Requirement Priority F7.1 Trigger invoicing based on actual hire start High F7.2 Support deposit/prepayment if required Medium F7.3 Calculate charges including GST, discounts, damages High F7.4 Integrate with finance system (e.g., SAP, Oracle) for invoicing High F7.5 View all invoices linked to customer and job Medium

2.8 Notifications & Communication

ID Requirement Priority F8.1 Send notifications for quote approval, booking status, delivery, etc. High F8.2 Use preferred customer channel (email/SMS/in-app) Medium F8.3 Log all communications per customer/job High

2.9 Reporting & Audit

ID	Requirement	Priority
F9.1	Generate reports: quote-to-booking ratio, asset utilisation, revenue	High
F9.2	Export data for external BI tools (Power BI, Tableau)	Medium
F9.3	Full audit trail of changes, with who/when/why	High

3. Non-Functional Requirements

ID	Category	Requirement
N1	Performance	System should support up to 500 concurrent users with <2s response time
N2	Availability	99.9% uptime SLA required for core quoting and booking functions
N3	Security	Must be compliant with ISO 27001 and OWASP Top 10
N4	Privacy	Must adhere to Privacy Act 1988 and Australian Privacy Principles
N5	Usability	UI should be mobile-responsive and require minimal training
N6	Integration	Must integrate with SAP, CRM, asset system, and e-signature tools via API
N7	Scalability	Must support future automation and AI agent integrations
N8	Data Retention	All transactional records to be stored for at least 7 years
N9	Multi-Branch Support	Allow staff to book across branches based on permission model

4. Future-Proofing (for EE)

• Compatible with agentic AI orchestration: agents to assist in pricing, compliance, and quote generation. • Structure to allow fractal flows (Flow = Define, Plan, Solve, Design, Do, Test, Deploy, Learn). • Token-aware architecture for cost-optimized LLM queries. • Modular for future use cases like self-service customer portal, AI-assisted compliance review, or predictive fleet availability. Would you like this delivered as a formal PDF or Word document, or mapped to EE platform flows and gating logic for development execution?

Here is a structured list of main screens for the Coates Hire quoting and hiring system, including screen names, primary functions, input/output data, and key actions. This is suitable for UI/UX, engineering, and agentic AI design.

1. Login & Dashboard

Purpose: Authenticate user and provide a snapshot of current activity

Aspect	Details
Functions	- Login with SSO or credentials- Role-based access- Show current quotes/bookings- Alerts and notifications
Inputs	Username, password or SSO token
Outputs	Dashboard: Open quotes, upcoming deliveries, pending approvals
Actions	Login, logout, go to quote/book, view tasks

2. Customer Search & Profile

Purpose: Identify or create customer and job site details

Aspect	Details
Functions	- Search customers by name, ID, ABN- Create/edit customer and job site
Inputs	Name, ABN, contact details, job site address
Outputs	Customer profile, history, site list, price agreements
Actions	Select customer, add new, edit existing, attach job site

3. Create Quote

Purpose: Prepare equipment quote for customer

Aspect	Details
Functions	- Add job details, dates, equipment- Auto-price & override- Check availability
Inputs	Hire start/end date, equipment list, quantity, customer/job
Outputs	Quote ID, price summary, availability status
Actions	Save draft, submit for approval, send to customer

4. Quote Review & Conversion

Purpose: Review submitted quote, edit if needed, and convert to booking

Aspect	Details
Functions	- Display quote summary- Approve/edit- Convert to booking
Inputs	Quote ID, user comments
Outputs	Final quote, quote-to-booking confirmation
Actions	Approve, edit and resend, convert to booking

5. Booking Screen

Purpose: Confirm booking details, assign assets, trigger dispatch

Aspect	Details
Functions	- Select assets- Assign branch- Schedule delivery
Inputs	Confirmed quote, delivery instructions, pickup date
Outputs	Booking ID,

assigned equipment, delivery plan Actions Finalise booking, assign fleet, print delivery docket

 6. Contract & Signature Purpose: Generate and capture contract acceptance Aspect Details Functions - Auto-generate rental contract- Send for digital signature Inputs Customer contact, contract template Outputs Signed contract PDF, signature logs Actions Review contract, send for signature, archive

 7. Dispatch & Logistics Purpose: Manage equipment delivery and pickup Aspect Details Functions - Schedule transport- Assign driver- Mark in-transit/delivered Inputs Delivery/pickup date, asset IDs, address Outputs Dispatch schedule, asset status update Actions Dispatch, reschedule, confirm delivery, trigger billing start

 8. Off-Hire & Return Purpose: Process pickup and close hire Aspect Details Functions - Confirm off-hire- Schedule pickup- Close billing Inputs Job ID, pickup request, return condition Outputs Final charges, updated asset status Actions Initiate pickup, calculate end charges, close booking

 9. Billing & Invoicing Purpose: Review and generate financial documents Aspect Details Functions - Invoice creation- Apply discounts/damages- Integrate with ERP Inputs Hire details, customer info, tax rules Outputs Invoice PDF, transaction log Actions Generate/send invoice, apply credit, mark paid

 10. Reporting & Audit Purpose: Access KPIs, traceability, and operational analytics Aspect Details Functions - View conversion rates, utilisation- Run audit logs Inputs Date range, region, asset or team filter Outputs Reports (downloadable), charts, audit entries Actions Export CSV, email report, flag anomaly

If you want this as an Excel-style table, UI mockups for each, or mapped to EE platform agent flows, just let me know.

Here is a detailed design proposal for four key screens in Coates Hire's quoting and hiring system. These designs incorporate Coates' branding, utilize real product examples from Coates' catalog, and are optimized for usability and efficiency.() Screen 3: Create Quote Purpose: Enable staff to generate a new equipment hire quote.() Key Features: • Customer Selection: Dropdown or search bar to select existing customers. • Job Details: Fields for job name, location, and duration. • Equipment Selection: Interactive catalog with images, names, and IDs of equipment. • Pricing: Auto-calculation of costs with options for discounts or overrides. • Availability Check: Real-time status indicators for equipment availability.() Inputs: • Customer ID • Job details • Selected equipment • Hire duration Outputs: • Quote summary • Estimated costs • Availability status Screen 4: Quote Review & Conversion Purpose: Allow staff to review, edit, and convert quotes into bookings.() Key Features: • Quote Summary: Detailed view of all quote components. • Edit Options: Ability to modify equipment, pricing, or job details. • Approval Workflow: Buttons for approval, rejection, or requesting changes. • Conversion: Option to convert approved quotes into bookings.() Inputs: • Quote ID • User comments Outputs: • Updated quote • Booking confirmation Screen 5: Booking Screen Purpose: Finalize bookings and schedule equipment delivery. Key Features: • Booking Details: Display of all relevant booking information. • Asset Assignment: Assign specific equipment to the booking. • Delivery Scheduling: Calendar interface to select delivery and pickup dates. • Confirmation: Finalize booking with a summary and confirmation number.() Inputs: • Booking ID • Delivery details • Assigned equipment() Outputs: • Booking summary • Delivery schedule • Confirmation receipt Screen 6: Contract & Signature Purpose: Generate and manage digital contracts for equipment hire.() Key Features: • Contract Generation: Auto-fill

contracts with booking details. • Digital Signature: Integration with e-signature platforms for customer approval. • Document Storage: Secure storage of signed contracts with easy retrieval. • Audit Trail: Record of all actions taken on the contract for compliance.() Inputs: • Booking ID • Customer contact information() Outputs: • Signed contract • Audit log • Contract status updates