

SPP - IPP-182 SF - Pricing Campaign CPC object and Details

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- Notifications
- Permissions
- Reports Required for Data control purposes

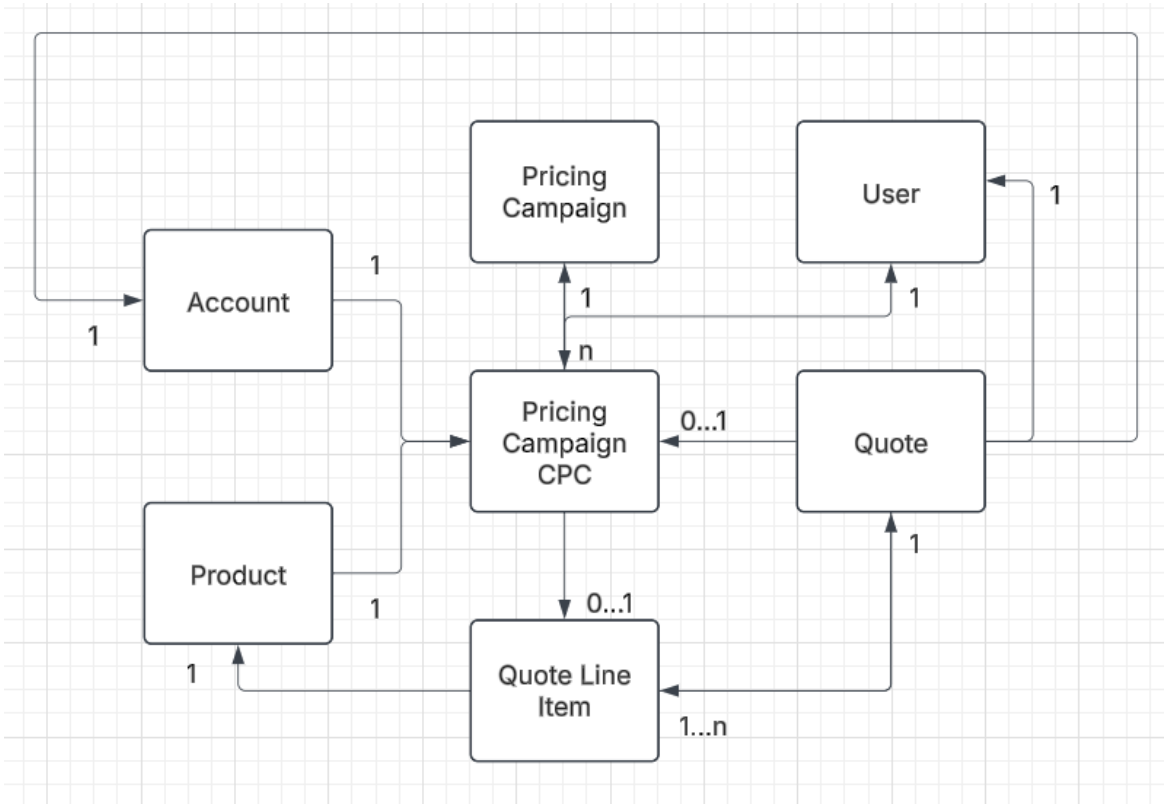
Original requirements in

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

Split from

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

Pricing Campaign CPC object



Create a new custom object : named **Pricing Campaign CPC** with: the following characteristics:

Label	Pricing Campaign CPC
Plural Label	Pricing Campaign CPCs
Object Name	Pricing_Campaign_CPC

Description	IPP-182
Record Name	Pricing Campaign CPC Name
Data Type	Auto Number
Display format	CPC-{00000000}
Allow Reports	True
Allow Activitie	True
Track Field History	True
Allow in Chatter Groups	False
Enable Licensing	False
Allow Sharing	True
Allow Bulk API Access	True
Allow Streaming API Access	True
Deployment Status	Deployed
Allow Search	True
Record Types	None required (Master only)
Tab	No tab required

IPP Custom Object
Pricing Campaign CPC

Save Save & More Cancel

Custom Object Definition (S&B)

The object and object fields are used to store, page layouts, and reports. **Be careful when changing the name or label as this affects existing integrations and merge templates.**

Label: Pricing Campaign CPC Example: Account
Plural Label: Pricing Campaigns CPC Example: Accounts
Status with search record: ☐

The Object Name is used when referencing the object on the API.
Object Name: Pricing_Campaign_CPC Example: Account

Description: IPP-182

Custom location help setting: ☒ Open the standard documentation help & Training website
☐ Open a location using a location record
☐ Open a location using a Virtualization page

Custom Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Pricing Campaign CPC 182 Example: Account Name
Date Time: Example: 2018-01-01
Display Format: Pricing CPC {00000000} Example: A-0000000000000000

Optional Features

☒ Allow Reports
☒ Allow Analytics
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more

☒ Allow Reports
☒ Allow Analytics
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status

☐ In Development
☒ Deployed

Search Status

When this setting is enabled, your users can see records of this object type when they search. Learn more

☒ Allow Search

Data Dictionary - Pricing Campaign CPC

	Field Name	Current Implementation	Apex Class references	API Name	Data Type	Track History	Required	Read Only	Picklist Values formul
1	Owner			Owner	Lookup (User, Group)	Yes			
2	Account Manager Review			Account_Manager_Review__c	Picklist	Yes			- No - Re - d (de - val - Re - Co - ed
3	Annual sales			Annual_sales__c	Number (16, 2)			Yes, on layout	
4	Annual volume			Annual_volume__c	Number (16, 2)			Yes, on layout	
5	Capped Reco price - Document Currency	Capped Recommended price - Document Curr	Updated	Capped_Reco_price_Document_Currency__c	Number (16, 2)			Yes, on layout	
6	Capped Reco price - Pricing Currency	Capped Recommended price - Pricing Curr	updated	Capped_Reco_price_Pricing_Currency__c	Number (16, 2)			Yes, on layout	

7	Capped Recommended price (%)	Capped Recommended price(Number)	ECCOPricingCampaignService	Capped_Recommended_price__c	Percent (16, 2)			Yes, on layout	
8	Committed price			Committed_price__c	Number (16, 2)	Yes			
9	Contracting model			Contracting_model__c	Text Area (255)			Yes, on layout	
10	Country	Picklist		Country__c	Text Area (255)			Yes, on layout	
11	CPC Status	Picklist	ECCOPricingCampaignService, ECCOPricingCampaignService_TEST	CPC_Status__c	Formula (Text) blocked URL				IF(Quote = null, TE: (Quote__r StageName TEXT (Account_ger_Review))
12	Dataiku ID	Dataiku__c		Dataiku_ID__c	Text(50) (External ID)			Yes, on layout	
13	Decision logic (path to microsegment)			Decision_logic_path_to_microsegment__c	Text Area (255)			Yes, on layout	
14	Document Currency	Picklist	updated	Document_Currency__c	Text Area (255)			Yes, on layout	

15	End Use	Picklist	updated	End_Use_ _c	Text Area (255)			Yes, on layout	
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16	Forecasted annual volume			Forecasted_annual_volume__c	Number (16, 2)			Yes, on layout	
17	FX rate used			FX_rate_used__c	Number (16, 2)			Yes, on layout	
18	Important features	Important_features_array__c	updated	Important_features__c	Long Text Area (32768)				
19	Last price			Last_price__c	Number (16, 2)			Yes, on layout	
20	Local Currency	Picklist		Local_Currency__c	Text Area (255)			Yes, on layout	

21	Market Cluster	Picklist		Market_Cluster__c	Text Area (255)			Yes, on layout	
22	Market Segment	Picklist	ECCOPricingCampaignService, ECCOPricingCampaignService_TEST updated	Market_Segment__c	Text Area (255)			Yes, on layout	
23	Microsegment (node)			Microsegment_node__c	Number (16, 2)			Yes, on layout	
24	Modelling approach			Modelling_approach__c	Text Area (255)			Yes, on layout	
25	Modelling level			Modelling_level__c	Text Area (255)			Yes, on layout	
26	Node price			Node_price__c	Number (16, 2)			Yes, on layout	
27	Price rationale			Price_rationale__c	URL(255)			Yes, on layout	
28	Pricing Campaign			Pricing_Campaign__c	Lookup (Pricing Campaign)			Yes, visible only on Compact Layout	

29	Pricing Currency			Pricing_Currency__c	Picklist	Yes		Yes, on layout	Global Value Set: Pricing Currency • EU • BG • BR • CH • CN • GE • HK • IN • JP • KR • KZ • RU • SE • SG • TH • US
30	Pricing Increment - Document Currency			Pricing_Increment_Document_Currency__c	Number (16, 2)			Yes, on layout	
31	Pricing Increment - EUR			Pricing_Increment_EUR__c	Number (16, 2)			Yes, on layout	
32	Pricing Increment - Pricing Currency			Pricing_Increment_Pricing_Currency__c	Number (16, 2)			Yes, on layout	
33	Pricing region			Pricing_Region__c	Picklist			Yes, on layout	Use the newly created Global Value Set Pricing Region
34	Product			Product__c	Lookup (Product)	Yes		Yes, visible only on Compact Layout	

35	Product Code	Text Area(255)	ApexClass SmartFactory ApexClass ECCOPricingCampaignService ApexClass PricingCampaignCPC_UpdateFields_Test ApexClass ECCOPricingCampaignService_TEST ApexClass PricingCampaignCtrl_Test Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications	Product_code__c	Text(20) (External ID)	Yes		Yes, on layout	
36	Product H4	Picklist	updated	Product_H4__c	Formula (Text) blocked URL				TEXT (Product_H4__r. Product_H4__ame__c)
37	Product Manager			Product_Manager__c	Formula (Text) blocked URL				Product_Manager__r. LastName & Product_Manager__r. FirstName
38	Projected sales impact			Projected_sales_impact__c	Number (16, 2)			Yes, on layout	
39	Quantified importance of feature	Quantified_importance_of_feature_array__c		Quantified_importance_of_feature__c	Number (16, 2)			Yes, on layout	
40	Quote			Quote__c	Lookup (Opportunity)	Yes		Yes, visible only on Compact Layout	

41	Reason for rejection			Reason_for_rejection__c	Picklist	Yes			• Co tive thn • Gri cus r o init • Pri fixe cor • Cu er i prc dis uen • Otl (Pl de)
42	Region	Picklist	ApexClass SmartFactory ApexClass ECCOPricingCampaignService ApexClass AccountController ApexClass PricingCampaignCPC_UpdateFields_Test ApexClass ECCOPricingCampaignService_TEST ApexClass PricingCampaignCtrl_Test	Region__c	Formula (Text) blocked URL				Sold_To_Reporting_on_ECCC
43	Rejection description			Rejection_description__c	Text Area (255)	Yes			
44	Sold-To			Sold_To__c	Account Lookup	Yes		Compact Layout	
45	Sold-To SAP Name	Not present	created	Sold_To_SAP_Name__c	Text Area (255)			Yes, on layout	
46	Sold-To Code			Sold_To_Code__c	Text Area (255)			Yes, on layout	
47	Team Cluster	Picklist		Team_Cluster__c	Formula (Text) blocked URL				TEXT (Sold_To_Team_Clt__c)
48	Uncapped Recommended price - EUR			Uncapped_Recommended_price_EUR__c	Number (16, 2)			Yes, on layout	
49	Uncapped Recommended price (%)			Uncapped_Recommended_price__c	Percent (16, 2)			Yes, on layout	

50	Unit of Measurement	Picklist	ApexClass ECCOPricingCampaignService ApexClass ECCOPricingCampaignService_TEST	Unit_of_M easureme nt__c	Text Area (255)			Yes, on layout	
51	Weighted average price			Weighted_ average_p rice__c	Number (16, 2)			Yes, on layout	

Compact Layout

New Compact Layout

Pricing Campaign CPC Compact Layout

Back to Pricing Campaign CPC

Compact Layout Detail

EditCloseDeleteCompact Layout Assignment

Label

Pricing Campaign CPC Compact Layout

Object Name

Pricing Campaign CPC

API Name

Pricing_Campaign_CPC_Compact_Layout

Included Fields

Pricing Campaign CPC Name
Pricing Campaign

Created By

Edoia Irfan

19/09/2021 10:52

Modified By

Edoia Irfan

19/09/2021 10:52

EditCloseDeleteCompact Layout Assignment

Compact Layout Selected Fields

Pricing Campaign CPC Compact Layout

Back to Pricing Campaign CPC

Compact Layout Detail

EditCloseDeleteCompact Layout Assignment

Label

Pricing Campaign CPC Compact Layout

Object Name

Pricing Campaign CPC

API Name

Pricing_Campaign_CPC_Compact_Layout

Included Fields

Pricing Campaign CPC Name
Pricing Campaign
CPC Status
Product
Sold-To
Quote

Compact Layout Assignment

Pricing Campaign CPC Compact Layouts

Compact Layout Assignment

SaveCancel

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Pricing Campaign CPC Compact Layout

SaveCancel

Page Layout

See

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for new layout definition

Lightning Record Page (activated as Org Default)

Pricing Campaign CPC

Pricing CPC -00000723

Long Tail

Owner

Pedro Infante

CPC Status

Not yet Reviewed

Product

ADV 7850A-ME

Sold-To

Test NL Account

Edit

Details

Related

CPC Information

Sold-To SAP Name

Test NL Account as in SAP

Sold-To Code

123456789

Country

US

Region

Americas

Team Cluster

Consumer, Healthcare, Environment

Market Cluster

Product H4

Product code

Z61-28916

Pricing Currency

USD - U.S. Dollar

Pricing Region

Americas

Market segment

End Use

Unit of Measurement

Contracting model

Account Manager input

Account Manager Review

Not yet Reviewed

Committed price

Rejection description

Reason for rejection

Metrics

Annual volume

Annual sales

Forecasted annual volume

FX rate used

Model Data

Microsegment (node)

Quantified importance of feature (array)

Modelling level

Modelling approach

Important features (array)

Decision logic (path to microsegment)

Dataiku

Pricing Recommendation

Weighted average price

Last price

Uncapped Recommended price (%)

Uncapped Recommended price - EUR

Capped Recommended price (%)

Capped Reco price - Document Currency

Capped Reco price - Pricing Currency

Pricing Increment - Document Currency

Pricing Increment - Pricing Currency

Pricing Increment - EUR

Local Currency

Document Currency

Price reco rationale

Node price

Projected sales impact

System Information

Created By

Pedro Infante, 19/08/2021 16:29

Last Modified By

Pedro Infante, 19/08/2021 23:51

Pricing Campaign CPC

Pricing CPC -00000723

Long Tail

Owner

Pedro Infante

CPC Status

Not yet Reviewed

Product

ADV 7850A-ME

Sold-To

Test NL Account

Edit

Details

Related

Pricing Campaign CPC History (2)

Date

Field

User

Original Value

New Value

19/08/2021 23:49

Sold-To

Pedro Infante

Test NL Account

19/08/2021 16:29

Created

Pedro Infante

View All

Validation Rules

See

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for updated solution

Validation Rule Name	Formula	Error Message	Error Location
Account_Manager_Rejected	<code>AND(ISPICKVAL (Account_Manager_Review__c, 'Rejected'), ISBLANK(TEXT (Reason_for_rejection__c)))</code>	Please provide a Reason for Rejection.	Field: Reason for Rejection
Account_Manager_Review_cannot_be_null	<code>TEXT(Account_Manager_Review__c) = null && ! isNew()</code>	Account Manager Review cannot be null.	Field: Account Manager Review

Automations Required

1. Account lookup retrieval

On insertion of Pricing Campaign CPC record - the Sold_To_Code__c value should be used to do a lookup on all the Account records (specifically on its field Account__r.SAP_Sold_To_Number__c);

- If a match is found between Pricing_Campaign_CPC__r.Sold_To_Code__c AND Account__r.SAP_Sold_To_Number__c - populate Pricing_Campaign_CPC__r.Sold_To__c with the same ID as the one retrieved from the Account record with the matching Account__r.SAP_Sold_To_Number__c
- If no matching Account__r.SAP_Sold_To_Number__c is found - leave Pricing_Campaign_CPC__r.Sold_To_Code__c = null

2. CPC Owner retrieval

On insertion of Pricing Campaign CPC record - the standard Owner User lookup needs to be the same as the Account Owner from the Account lookup (Sold-To) retrieved from the automation Account lookup retrieval.

3. Product retrieval

On insertion of Pricing Campaign CPC record - the Product_Code__c value should be used to do a lookup on all the Product records (specifically on its field Product__r.Material_Group__c);

- If a match is found between Pricing_Campaign_CPC__r.Product_Code__c AND Product__r.Material_Group__c - populate Pricing_Campaign_CPC__r.Product__c with the same ID as the one retrieved from the Product record with the matching Product__r.Material_Group__c
- If no matching Product__r.Material_Group__c is found - leave Pricing_Campaign_CPC__r.Product__c = null

4. Committed Price default value

On record creation, the number field Committed_Price__c needs to be pre-populated with the same value inserted in the field Capped_Reco price_Pricing_Currency__c.

Notifications

Full requirements captured in the context of



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Permissions

Detailed analysis being done in



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The object Pricing Campaign CPC needs to be aligned with Account access permissions (confidentiality, roll up to managers)

Sharing and security : Private (only Owner and user above in role hierarchy) + Edit access.

Do we need to give a view all and/or modify all to some profiles or users ?

Is some region managers who need to see more than their records ?

What about confidential accounts ? Access only by owner or account team ? Product manager access ?

Reports Required for Data control purposes

Report on any Pricing Campaign CPC record where Sold_To__c = null OR Product__c = null

Purpose: be able to see which CPC records where inserted where no match was found for the Account SAP Code or Product SAP Code or that were inserted without a value in **Capped Reco price - Pricing Currency**

NOE, Julien - who will manage this data? What is the goal of "controlling" these failed insertions of CPC records? Will it be: analyzing the discrepancies and correct the data in Dataiku/SF/SAP so that the Codes match across the systems and no more CPC insertions fail in the future due to mismatched Product or Account Codes?

Story specific for reports - Placeholder Story not filled in yet -



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