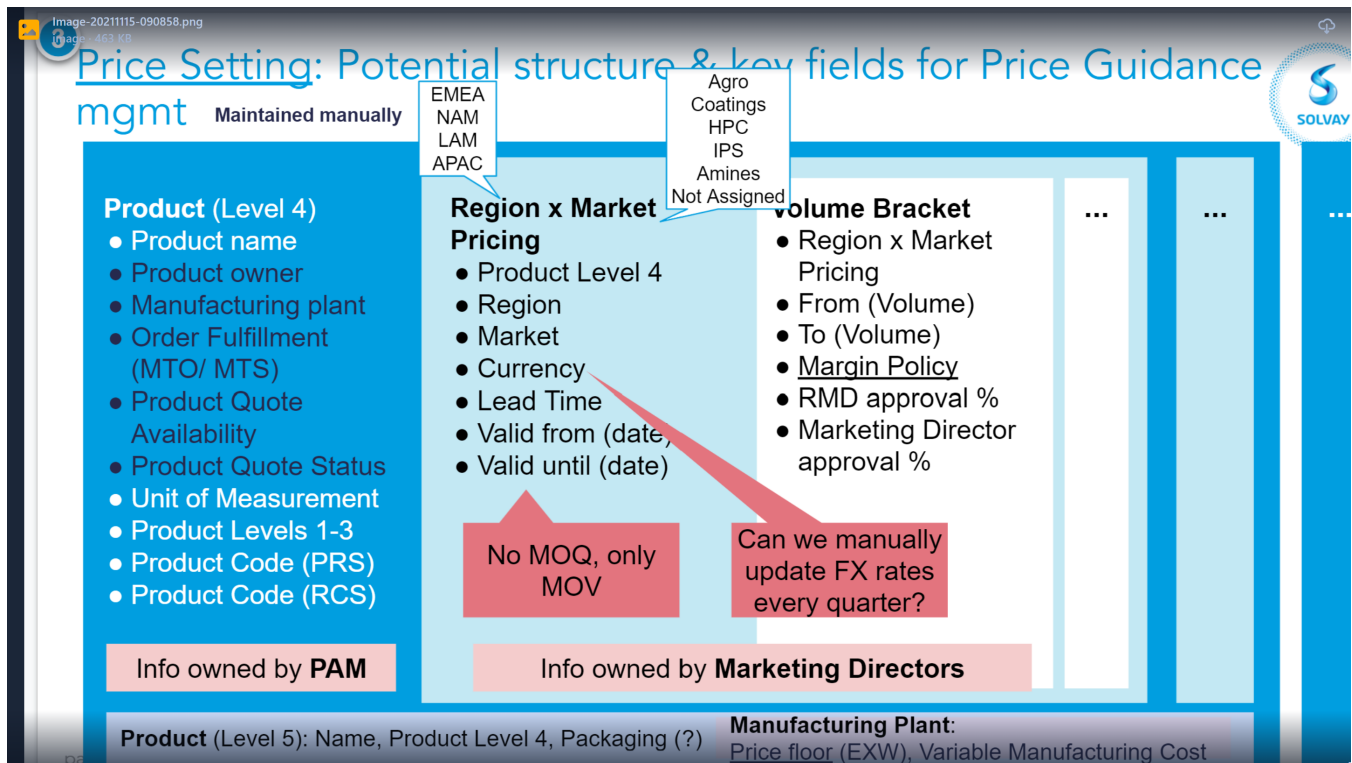
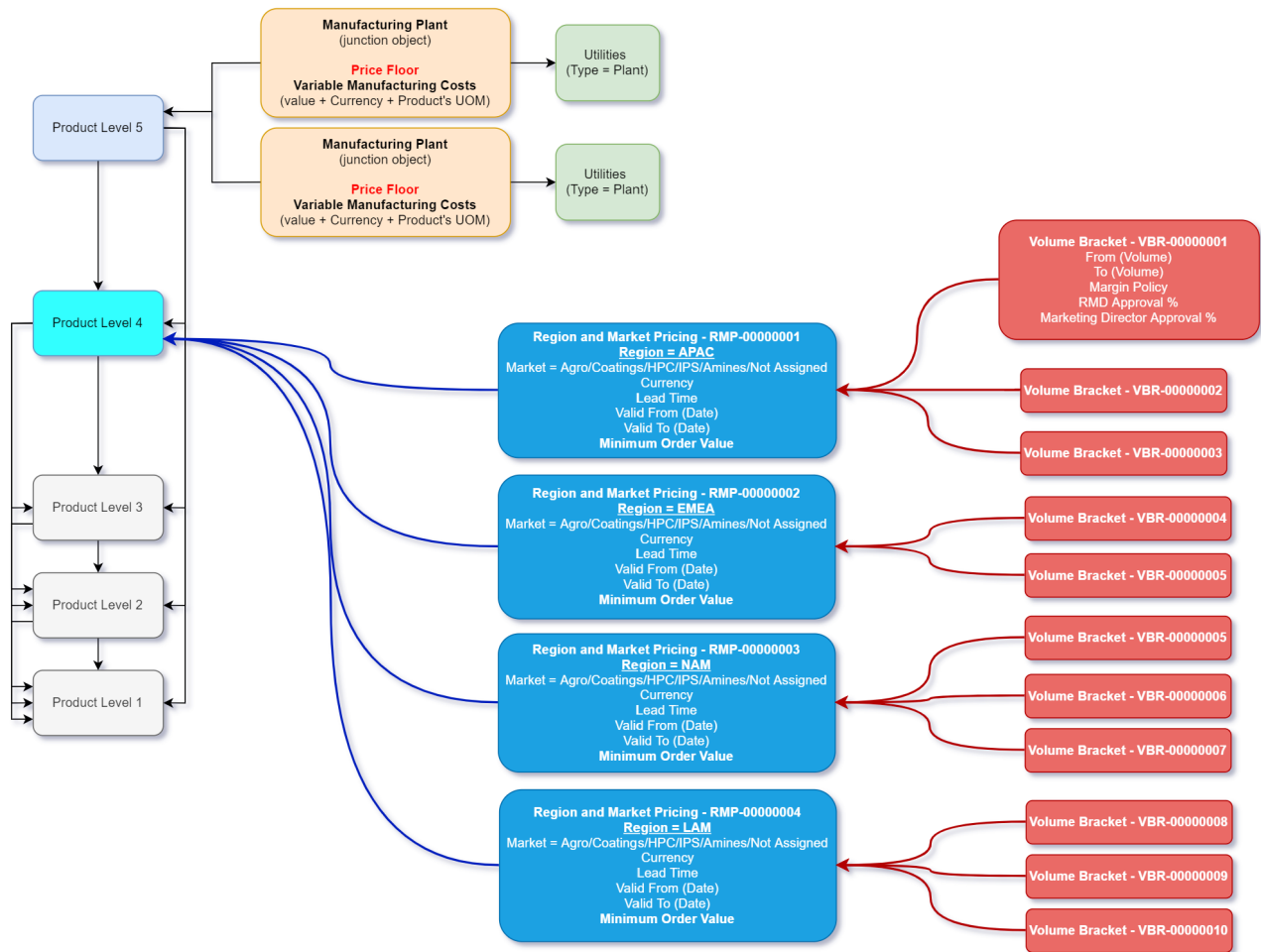


# SF - Novecare - Pricing and associated functionalities Data model

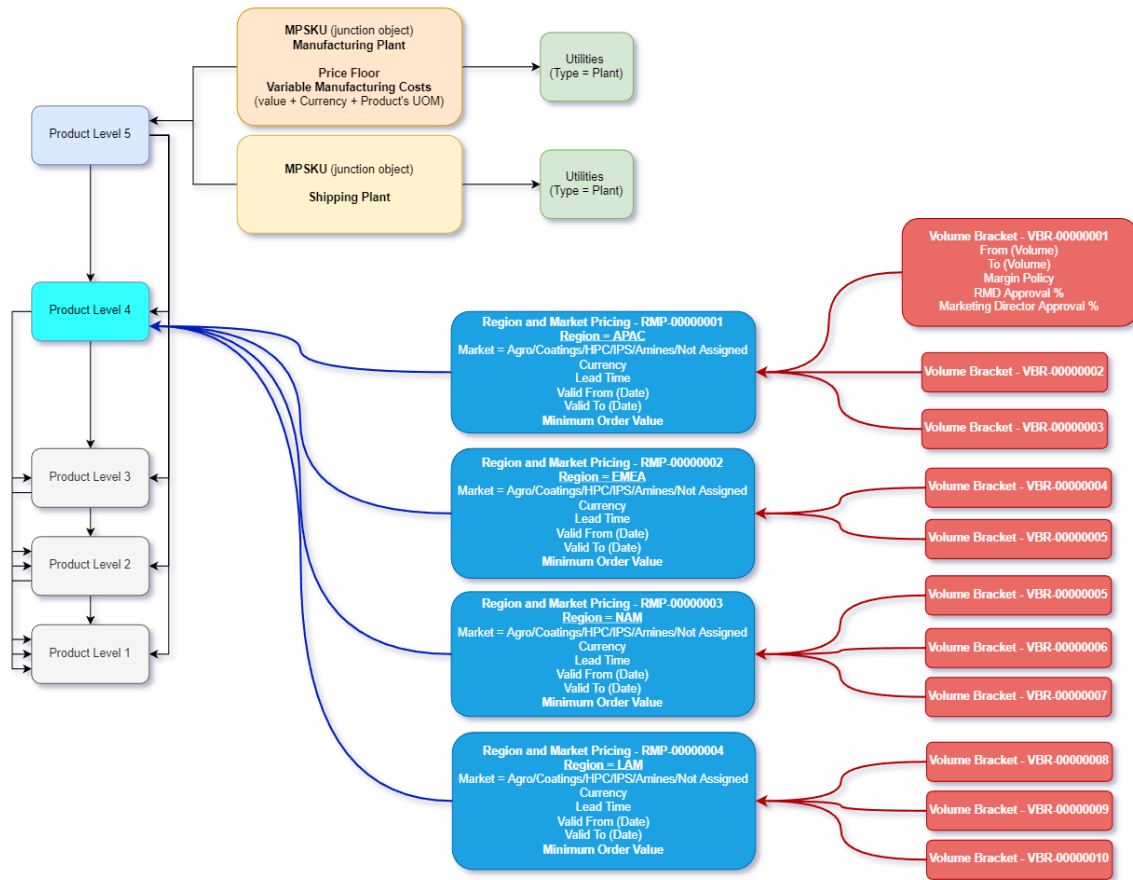
- Initial Data Model ERD (November 2021)
- Current Data Model ERD (June 2022)
- Region and Market Pricing - RMP-{00000000}
- Volume Brackets - VBR-{00000000}
- Product
- Manufacturing Plant - MFP-{00000000}
  - Manufacturing Plant Record Type
  - Shipping Plant Record Type
- Approvals Settings
  - PAM / RMD Approvers
  - GMD Approvers
- [Resolved] Questions for Business
- Open Points



## Initial Data Model ERD (November 2021)



**Current Data Model ERD (June 2022)**



## Region and Market Pricing - RMP-{00000000}

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

### Questions:

#### Minimum Data requirements:

Will all Products always have Pricing for all 4 Regions (APAC/EMEA/NAM/LAM)? No

Will all Products always have the 6 Markets (Agro/Coatings/HPC/IPS/Amines/Not Assigned)? No

- Product Level 4 - Lookup to Product (Filter: Level 4)
- Market/BU - Picklist field with the following values:
  - Non Allocated (default)
  - Agro
  - Amines
  - Coatings
  - Home & Personal Care
  - Industrial Solutions
- Currency - standard field

- ~~Lead Time (days)~~ - Number field (4,0) - removed on



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

- Valid From (Date)
- Valid To (Date)
- Is Active? Formula field (Checkbox) - IF Valid From >= TODAY() && Valid To <= TODAY()
- Region (Picklist)- Use this existing Global picklist value set GlobalRegion

**SETUP**  
**Picklist Value Sets**

### Global Value Set

« Back to List

Values [4] | Inactive Values [0] | Fields Where Used [5+]

#### Global Value Set Detail

Edit Delete

▼ Information

|             |                                                      |
|-------------|------------------------------------------------------|
| Label       | GlobalRegion                                         |
| Name        | GlobalRegion                                         |
| Description | This picklist will be used to map Region by Country. |

#### Picklist Values Used

Active and inactive picklist values 4 (1,000 max)

Edit Delete

#### Values

New Reorder Replace Printable View Chart Colors ▼

| Action                  | Values | API Name | Default                  | Chart Colors         | Modified By                      |
|-------------------------|--------|----------|--------------------------|----------------------|----------------------------------|
| Edit   Del   Deactivate | APAC   | APAC     | <input type="checkbox"/> | Assigned dynamically | Dello Perpetuo, 11/11/2016 15:04 |
| Edit   Del   Deactivate | EMEA   | EMEA     | <input type="checkbox"/> | Assigned dynamically | Dello Perpetuo, 11/11/2016 15:04 |
| Edit   Del   Deactivate | LAM    | LAM      | <input type="checkbox"/> | Assigned dynamically | Dello Perpetuo, 11/11/2016 15:04 |
| Edit   Del   Deactivate | NAM    | NAM      | <input type="checkbox"/> | Assigned dynamically | Dello Perpetuo, 11/11/2016 15:04 |

#### Inactive Values

No Inactive Values values defined.

## Track History:

### Region and Market Pricing Field History

Help for this Page

This page allows you to select the fields you want to track on the Region and Market Pricing History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

Save Cancel

Deselect all fields

Selected Fields: 8 Analyze fields...

Organizer for Salesforce Field History Plugin

#### Track old and new values

|                                  |                                     |                  |                                     |
|----------------------------------|-------------------------------------|------------------|-------------------------------------|
| Currency                         | <input checked="" type="checkbox"/> | Lead Time (days) | <input checked="" type="checkbox"/> |
| Market / BU                      | <input checked="" type="checkbox"/> | Owner            | <input checked="" type="checkbox"/> |
| Product Level 4                  | <input checked="" type="checkbox"/> | Region           | <input checked="" type="checkbox"/> |
| Region and Market Pricing Number | <input type="checkbox"/>            | Valid From       | <input checked="" type="checkbox"/> |
| Valid To                         | <input checked="" type="checkbox"/> |                  |                                     |

Save Cancel

## Validation Rules Required

1. Valid To Date cannot be < Valid From - Valid\_To\_Cannot\_be\_Before\_Valid\_From
2. Valid From cannot be in the past on Creation only - Valid\_From\_cannot\_be\_in\_past\_Create
3. Valid To cannot be more than 5 years from Today - both on creation and Edit - Valid\_To\_Cannot\_be\_Greater\_5Y\_from\_Today

## APEX Trigger Required to prevent Duplicate records:

A Level 4 Product cannot have 2 RMPs for same combination of Region and Market:

Example: we cannot allow the creation (or edition to generate) 2 RMPs under the same Product Level 4 (ID) with the same Region (picklist) and the same Market (picklist).

## Volume Brackets - VBR-{00000000}



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

- Region and Market Pricing (Master-Detail)
- From (Volume) - number (16,2)
- To (Volume) - number (16,2)
- Margin Policy value - number (16,2)
  - formula field to show as **Margin Policy** (RMP.Currency + Margin Policy Value + RMP.Product.Unit of Measure)
- RMD Approval % - Percent number
- Marketing Director Approval % - Percent number

### Validations / Triggers to:

- Never allow any VBR From (Volume) to be smaller than 0,01
- Never allow any VBR From (Volume) to be > or = To (Volume)
- APEX - Prevent overlaps on From/To VBRs under the same RMP (similarly to what was done on Product Bracket in iCare)

Volume Bracket logic refactored on:



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

## Product



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



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

What Products need to be "quotable" - Level 5 only

**Product is meant to be Public Read Only**

### Product Manager

New lookup to User object required -



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

### Data Issues:

There are currently 15 554 Novecare Level 5 Active Products in Core Production environment.

According to [NOE, Julien](#) , it should be around 3500 Products- data cleanup required and confirmation of SAP integration to check why SF has almost 5X more Active Products in this GBU than it should.

## Manufacturing Plant - MFP-{00000000}

(after adding Shipping Plant Record Type, object was renamed to Material - Plant SKU; MPSKU-{00000000})

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

Business Users need to be able to capture certain pricing details on a per Product Level 5 basis - namely the Price Floor and the Variable Manufacturing Costs of each Product. Those values vary per Plant where they are produced (Manufacturing Plants).

Solvay Manufacturing Plants are captured in CORE in the object Utilities, specifically those where Type = Plant.

[NOE, Julien](#) to confirm that Utilities records in Core where Type = Plant and Involved GBU includes Novacare - correspond to the needed Solvay Manufacturing Plants for Novacare quoting purposes

Report - <https://solvay-crm.lightning.force.com/lightning/r/Report/00O0800000526yvEAA/view?queryScope=userFolders>

## Manufacturing Plant Record Type

### Price floor

- Defined on a per Manufacturing Plant basis (same product coming from 2 different Utility (Plants) can have 2 different values on Price Floor)
- Price Floor is a fixed value that is calculated based on:
  - Product Level 5 + Manufacturing Plant

- only depends on Product - no relation to Market or Region nor Logistics and Duties
- Price Floor will be inputted in SF directly per Product Level 5 combination with Manufacturing Plant
- Format = Currency (16,2)
- Required

### Variable Manufacturing Costs

- Format = Currency (16,2)
- Required

### Product UOM

Formula field retrieving Unit of Measurement picklist value from Product in Manufacturing Plant object

### Track History Changes on all MFP fields

Manufacturing Plant Field History Help for this Page

This page allows you to select the fields you want to track on the Manufacturing Plant History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

Save Cancel

Deselect all fields

Selected Fields: 6 Analyze fields... [Organizer for Salesforce Field History](#)

Track old and new values

|                 |                                     |                              |                                     |
|-----------------|-------------------------------------|------------------------------|-------------------------------------|
| Currency        | <input checked="" type="checkbox"/> | Manufacturing Plant Number   | <input checked="" type="checkbox"/> |
| Price Floor     | <input checked="" type="checkbox"/> | Product                      | <input checked="" type="checkbox"/> |
| Utility (Plant) | <input checked="" type="checkbox"/> | Variable Manufacturing Costs | <input checked="" type="checkbox"/> |

Save Cancel

Trigger required to prevent same Level 5 Product of being linked twice to the same Utility (Plant) - aka, we need to prevent two MFP records from being linked to the same Product.ID and same [Utility.ID](#) (both on creation and edit)

#### Possible:

[MFP1](#) linked to ProductA+UtilityX and [MFP2](#) linked to ProductA+UtilityY

[MFP1](#) linked to ProductB+UtilityY and [MFP2](#) linked to ProductA+UtilityY

#### Needs to be prevented by Trigger

[MFP1](#) linked to ProductA+UtilityX and [MFP3](#) linked to ProductA+UtilityX

## Shipping Plant Record Type



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

Data model was adjusted to add a many to many relationship between Utility (Plants) and Products - reviewing the data model of the current Manufacturing plant junction object (renamed to MPSKU).

Shipping Plants contain no further information - these records are aimed exclusively at linking one Product to one Utility (Plant).

In order to be able to distinguish between Shipping Plants and Manufacturing Plants -



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

The Related List on Product Flexipage was adjusted to display the MPSKU Record Type value

# Approvals Settings

Every Quote line item can need an approver.

Two level of approval is set :

- RMD (regional Market Director)
- GMD (Global Market Director)

The level % of approval is set in the Volume Bracket record.

Volume Bracket  
VB-00019405

**Details**

Information

Region and Market Pricing  
RMP-00005702

From (Volume)  
1.00

% Margin Policy

Market Margin Policy %

Unit Margin Policy

Market Margin Policy Value  
2.00

Currency  
EUR

Unit of Measurement  
KG

Approvals %

RMD Approval %  
0.25 %

Marketing Director Approval %  
0.35 %

System Information

## PAM / RMD Approvers

The list of Approver is on the Utility, list view : "One Quotes Price Deviation"

[One Quotes Price Deviation](#) | [Utilities](#) | [Salesforce](#)

Approver user are provided with the combinaison of : GBU - BU - REGION - ROLE

## GMD Approvers

GMD Approvers are the OWNER of the Region Market pricing

## [Resolved] Questions for Business

- Are Products in Core always exclusively GBU specific? ie, the quoting tool being developed will only use Products where GBU = Novocare? **Yes**
  - Are the Novocare GBU products used by any other GBU? **No**
- Is the Active/Inactive value of Products currently being used? **Yes - room for improvement**
- What is the "Generic Product" checkbox supposed to represent?
  - **Used to allow linking Opps to Products that do not really represent a "sellable" product - for interim stages of the Quoting /Selling process**
  - **Exclude these Generic Products from the Quoting Process...**
- Are Level lookups filtered by Level? **No -room for improvement**
- Are Level lookups filtered by GBU (only a GBU level 4 can be parent of a GBU level 5) **No - room for improvement**

### Price Policy Versus Price Floor

**Pricing Policy - computation that** starts from Margin Policy (captured at [Product Level 4](#) - varies according to Region, Market and Product); Marketing Directors will be maintaining the Margin Policy

- plus Variable Manufacturing Costs (depends only on Product)
- plus Duties and Logistics Costs (depends on Customer location and Incoterms)

#### **Price Floor**

- it is a fixed value that is calculated based on:
  - Product Level 5 + Manufacturing Plant
- only depends on Product - no relation to Market or Region nor Logistics and Duties

Price Floor will be inputted in SF directly per Product Level 5

## **Open Points**

#### **Logistics & Duties - TBD**

#### **Order Fulfillment (MTO/MTS)**

Picklist field with values:

- Pending [NOE](#), [Julien](#) input 18 Nov 2021 on values