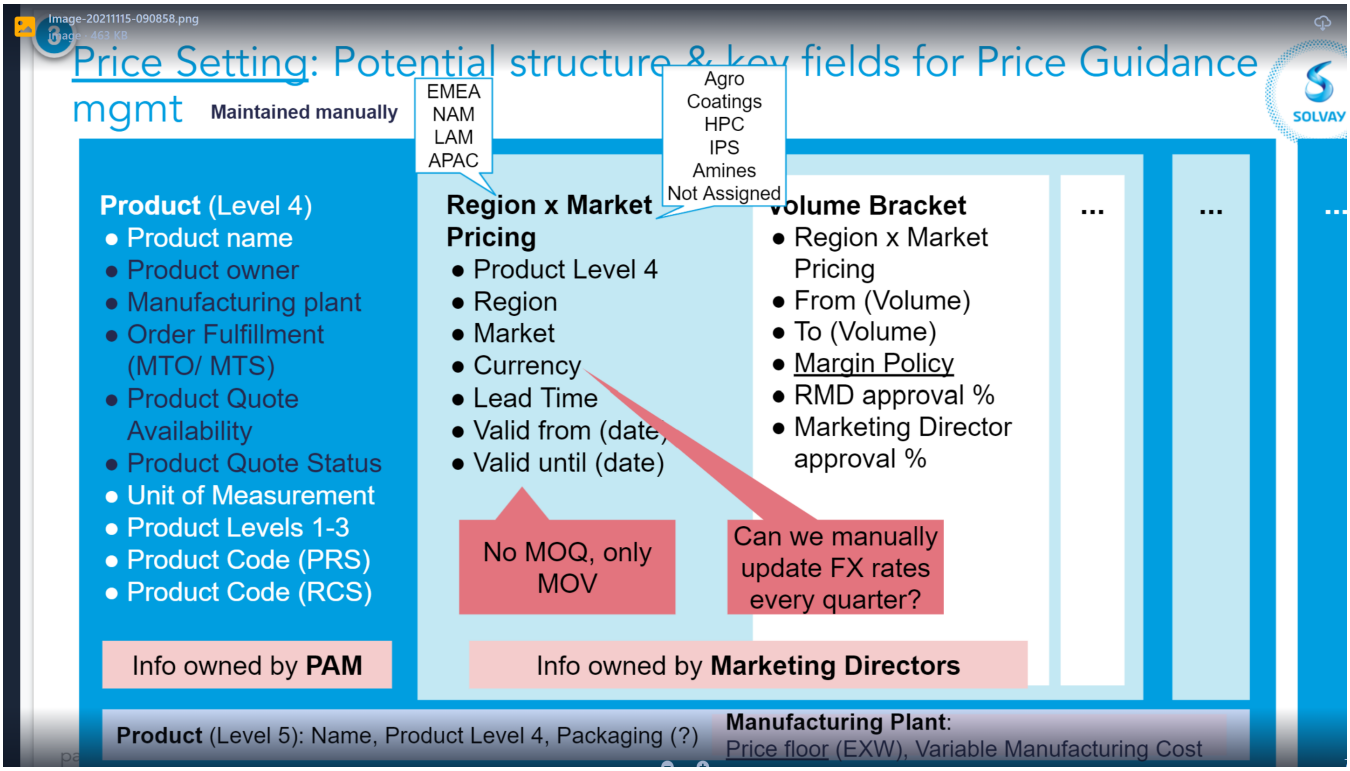
SF - Novecare - Pricing and associated functionalities Data model

- 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



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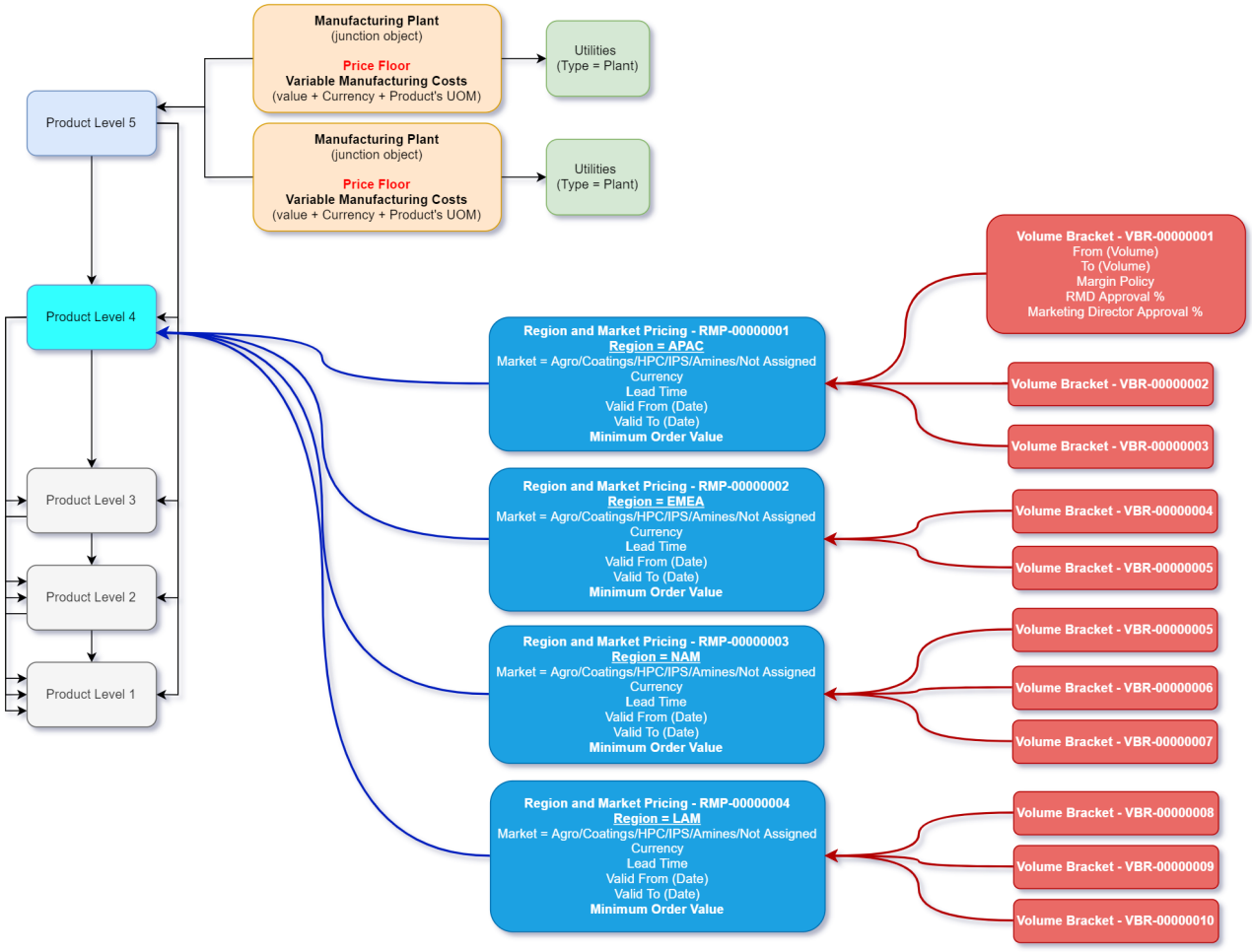
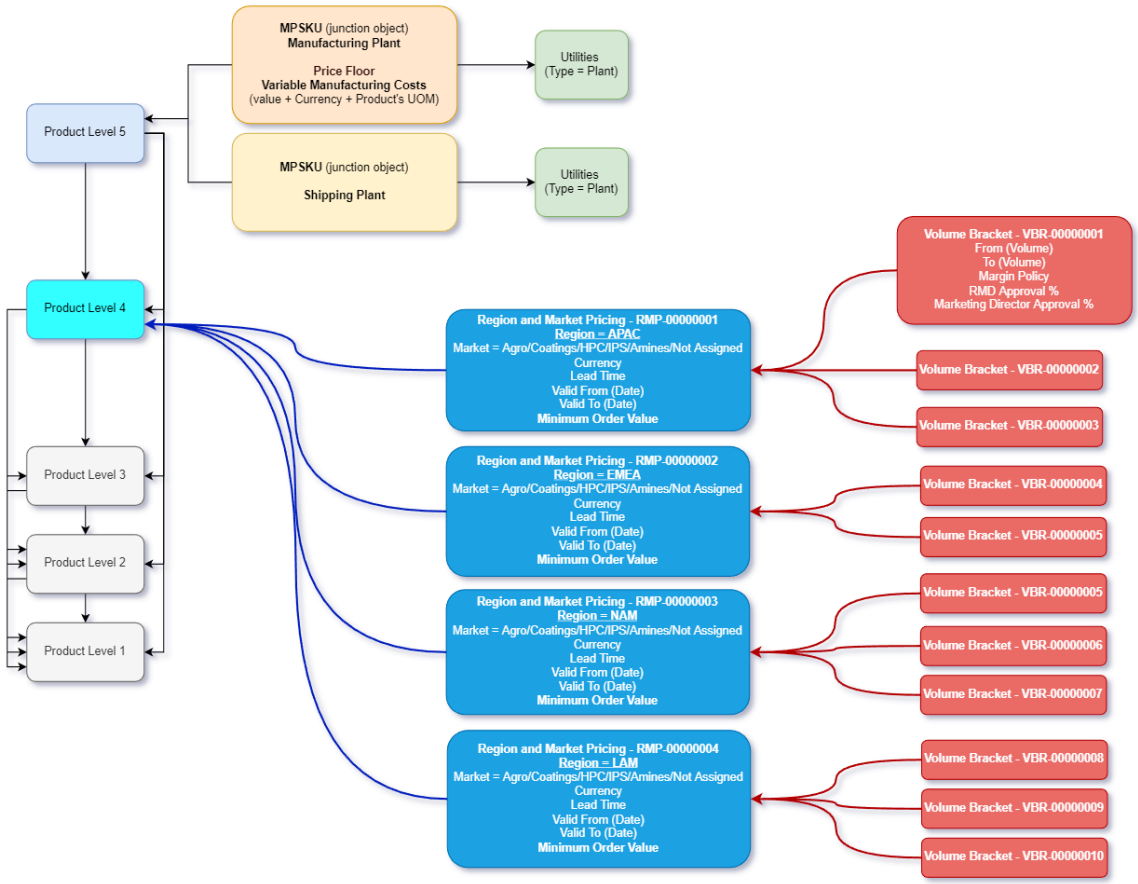


Current Data Model ERD (June 2022)



Region and Market Pricing - RMP-{00000000}

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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

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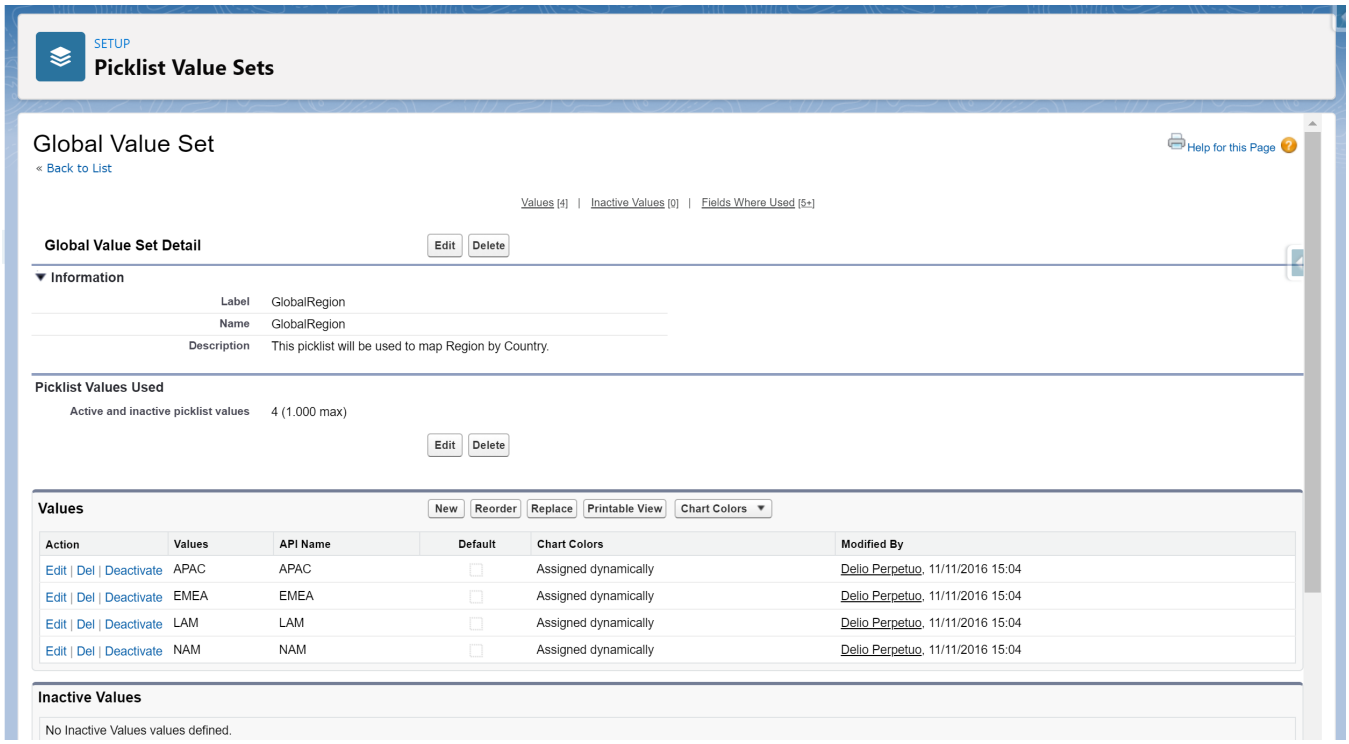
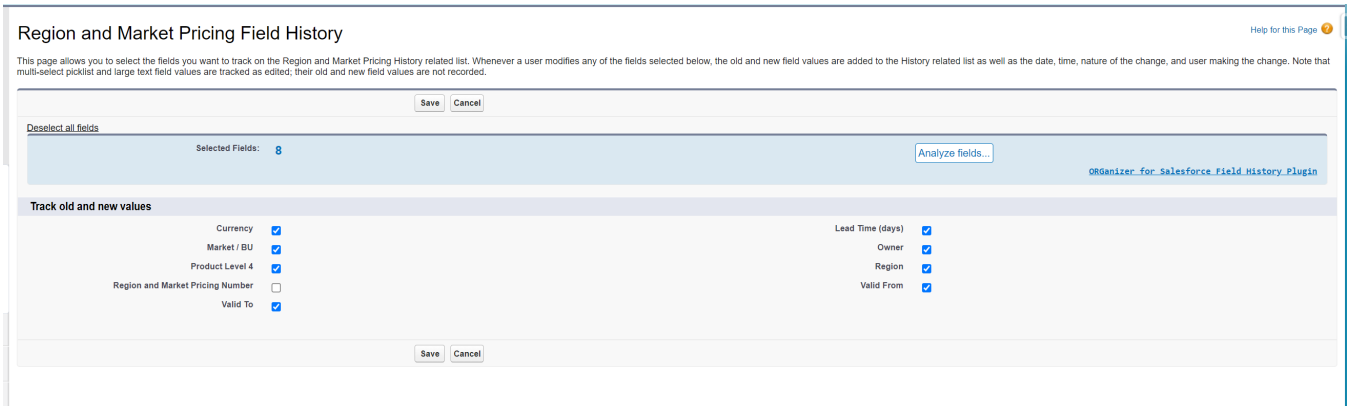
- Valid From (Date)
- Valid To (Date)
- Is Active? Formula field (Checkbox) - IF Valid From >= TODAY() && Valid To <= TODAY()
- Region (Picklist)- Use this existing Global picklist value set GlobalRegion



Track History:



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}

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- 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:

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Product

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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 -

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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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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 Novecare - correspond to the needed Solvay Manufacturing Plants for Novecare 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

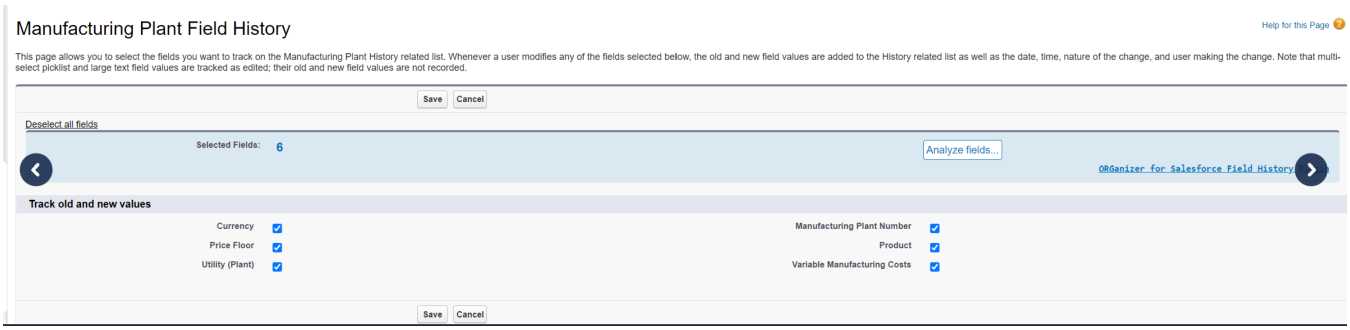
Variable Manufacturing Costs

- 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



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

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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 -

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

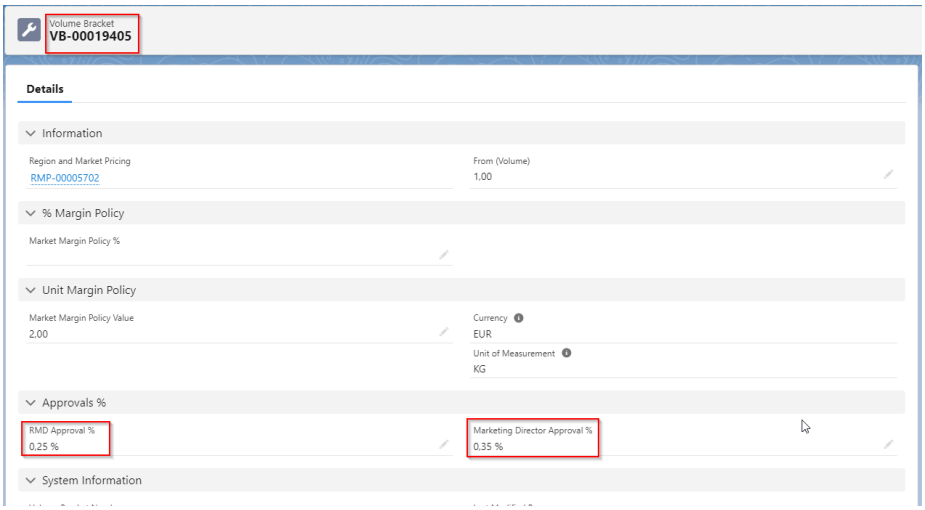
Approvals Settings

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.



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 = Novecare? ***Yes***
    - Are the Novecare 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