

FD - [CORE] 4 - Configure Product Details

Once the Account Manager has created a one quote line item he has to set all needed information.

This document describe all requested p

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rocess and behaviour during that process.

This is based on the new Ux redesign from Summer 2023'

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1/ Table Features

- All One Quote line items are displayed on line that can be expanded
- Main information are displayed on every lines
- At Draft Status, user can update the following fields: (1)
 - Ship To
 - Incoterms
 - Estimated annual volume
 - Quoted Price

At All One Quote stage :

The screenshot displays the 'Configuration & Products' section of a software interface. At the top, there are tabs for 'Chatter', 'Details', 'Configuration & Products' (which is active), 'Rebates', and 'Email Offer'. Below the tabs, there's a search bar with 'Quick Find (Product, Prod...' and buttons for 'Display (147)', 'Compact Report', 'Add Product', and 'Detail for Approval'. A table lists two quote line items for 'Product 5'. The first item has 'SHIP TO: HENKELS AG & CO', 'INCOTERMS: FOB', 'ESTIMATED ANNUAL VOLUME: 1000', 'UOM: KG', 'QUANTITY: 1000', 'UNIT PRICE: EUR 13.33', 'TOTAL PRICE: EUR 13330.00', 'STATUS: OK', and 'ACTION: Edit'. The second item has 'SHIP TO: HENKELS AG & CO', 'INCOTERMS: CIP', 'ESTIMATED ANNUAL VOLUME: 2000', 'UOM: T', 'QUANTITY: 2000', 'UNIT PRICE: EUR 15000.00', 'TOTAL PRICE: EUR 30000.00', 'STATUS: OK', and 'ACTION: Edit'. Below the table, there's a detailed view for 'Product 5' with fields for 'Ship To' (KNAUF GIPS KG), 'Incoterms' (CIP), and 'Estimated Annual Volume' (14). There are also buttons for 'Clear Filters' and 'Line Status: OK'.

- The Account manager can Sort all columns except "Action" (2)
- The Account manager can use a Quick find search (3)
 - Product Level 5
 - Ship To
 - Ship To Code (PRS /RCS)
- The Account manager can use a filter panel to filter : (4)
 - Product Level 4
 - Incoterm
 - Ship-to
 - Approval Status
 - Accepted by the customer?

- Can be yes, no or none



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- Approver

- The Account manager can see the additional filters or remove filters if needed one by one (5) of all of them (6).



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configuration.

Unit of Measure (UOM) (7)

The field is a select list that is used to specify the unit of measure used for a particular product.

- Field is pre-populated using UOM value selected on ONE Quote record
- End user can change this selection when adding products on "Add products" screen
- By default, user can select any standard UOM for each line item added to ONE quote
 - (Standard UOM's: **G, KG, LB T**)
- Additionally, if selected product supports alternative UOM's, they will be available for selection
 - (Currently supported alternative UOM's: **L, GAL**)

UOM Selection can be found here [FD - \[CORE\] Alternative Units of Measure \(UOM\)](#)

Full epic for alternative UOM's and it's features



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1/ Set OQLI data

The Account manager need to fill some data at OQLI level.

1.1/ Manufacturing plant

- OQLI. Product = MPSKU.
- Product
- MPSKU.Record type = Manufacturing plant
- MPSKU is Active

The screenshot shows the AWS IAM console configuration for a new user named 'root'. The 'Permissions' tab is active, displaying a policy named 'root' with a single statement that grants the 'iam:ListUsers' action on all resources ('*'). The 'Groups' tab is also visible, showing that the user is not a member of any groups. The 'Groups' tab includes a table with columns for 'Groups', 'Permissions', and 'Actions', and a 'Add to group' button.

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If there are more than one option the system display a dropdown list where the user need to select the appropriate Manufacturing plant

Additional Rule

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To avoid any confusion on dummy plants by region and avoid issues on price guidance calculation, The Manufacturing plant is set as read only on the OQLI LWC if One Quote BU = "AT - Polymer Additives"

User can select From the object "Material plant SKU" and the record that match the following :

The Ship to is automatically set to the Quote.
Ship To.

Incoterms are set automatically base on the Quote.Incoterms

- OQLI.Product = MPSKU.Product
- MPSKU.Record type = Shipping plant
- MPSKU is Active

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If there are only one option available then the system autofill the Manufacturing plant field

If there are more than one option the system display a dropdown list where the user need to select the appropriate Manufacturing plant

However the user can decide to remove it and change it to a new one.

The user can select ANY ship to. (no restrictions are applied)

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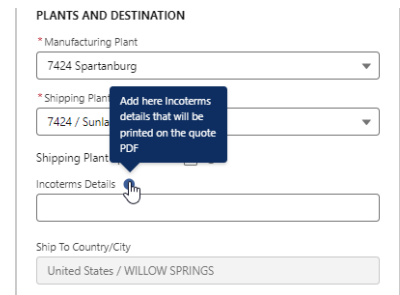
The Ship To Country / City is also displayed below ship to. It is related to the field :

OQLI.Ship To.SLV7_ACC_Country__c

However the user can decide to change it to any values

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

Incoterms details (13) can be added here. They will be added to the Email PDF of the quote



1.5/ Estimated Annual Volume

This field is a manual entry from the user in order to specify the Estimated Annual Volume of that product for the Sold to.

Based on the value set, the system will automatically try to identify the appropriate volume bracket based on the following :

- Product Level 4 + Quote.Region + Quote.Country + Is Active ==> RMP

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- Country level is only active for Aroma

1.6/ Quoted Price

The quoted price need to be set by the user.

At OQLI creation the quoted price is prefilled to the Price Guidance.

If the quoted price is below the "Price Guidance" it is requested to set a "Rationale". A validation rule will test this rule

==> Describe calculations of all prices : See [2 / Price Settings Calculation](#)

==> Described calculation of VAT : [see 4/ VAT](#)

==> JPY quotes : a quote with JPY currency can not move to Send for approval if there are some decimals in the quoted price or any scale price.

A warning message is displayed if the user clicks on "Send for Approval"

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 Warning
Decimal values are not allowed for Quoted Price when the currency is JPY.

1.7/ Description & Special Customer information

The user can add any comment in the description. It is used by the Account manager to share information with the line approver.

The Special Customer information set by the Account Manager will be set in the Quote PDF

If a combinaison Product Level 4 + Quote. Region + Quote.Country + Is Active is found we select the RMP otherwise we try to go at : Product Level 4 + Quote.Region + Quote. Country + Is Active

- Estimated Annual Volume ==> Volume bracket
 - For all volume bracket of the RMP select the max "From Volume" where From Volume >= Estimated Annual volume

Based on that selection the following fields are calculated :

- Margin Guidance
- Price Guidance

Yearly Financial Impact has been removed

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1.8/ Legal Entity

Prefilled with the quote Legal Entity

Can be modified by the account manager

1.9/ Contractual Commitment

By default it is set to Soft.

User can change it to the following :

- Contract (separate, written, legally binding document)
- Hard quote (preventing price renegotiation before end date)
- Soft quote (allowing price renegotiation before end date)

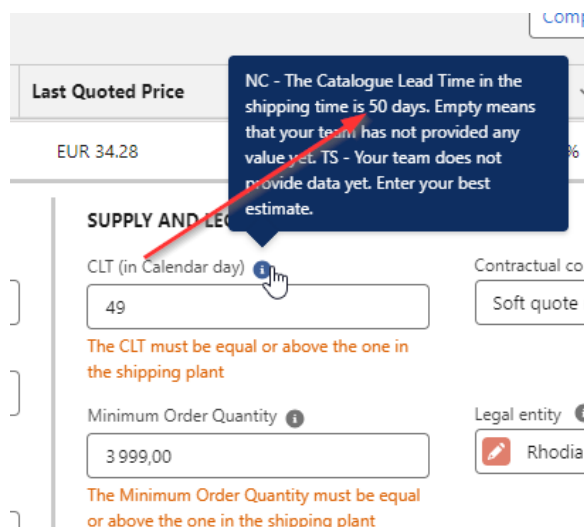
1.10 / Minimum Order Quantity & Lead Time Days

When the Shipping plant is specified or updated we retrieve the following information and set it to the One Quote Line Item :

- Can not be modified :
 - Stock Holding Strategy
- Can be modified :
 - Quote Line . Minimum Order Quantity = Shipping Plant . Minimum Order Quantity
 - Quote Line . Lead Time Days = Shipping Plant . Lead Time Days

The Account manager can change theses values following some validation rules :

- The "Lead time" must be greater than the established catalogue lead time
- You can't define a minimum order quantity below the catalog one.:
[SLV49_Minimum_order_quantity__c]



Comp

Last Quoted Price

EUR 34.28

SUPPLY AND LEAD

CLT (in Calendar day) 

49

NC - The Catalogue Lead Time in the shipping time is 50 days. Empty means that your team has not provided any value yet. TS - Your team does not provide data yet. Enter your best estimate.

Contractual commitment

Soft quote (

Minimum Order Quantity 

3 999,00

Legal entity 

 Rhodia

The CLT must be equal or above the one in the shipping plant

The Minimum Order Quantity must be equal or above the one in the shipping plant



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In order to help the Account manager
the value stored on the Shipping plant
is displayed in the hover

1.11/ Scale Pricing

The Account Manager can specify 3
Scale pricing if needed.

By clicking on "Enable Scale Pricing"
we have the following behaviour

- New small table that display
the following :
 - Bracket 1 :
 - From
 - Must be above from the Bracket 1.
 - Price
 - Must be above from the Bracket 2.
 - Bracket 2 :
 - From
 - Must be above from the Bracket 2.
 - Price
 - Must be above from the Bracket 3.
 - Bracket 3 :
 - From
 - Must be above from the Bracket 3.
 - Price
 - Must be above from the Bracket 3.
- Validation rule based on the
Price are set :

Scale	From	Price
Scale 1	10000.00	2.00
Scale 2		
Scale 3		



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serve
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be
due
to
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config
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o

o Only at OQLI
UPDATE

■ &

o One Quote = Draft

■ &

o Enable Scale Pricing
= True

■ &

o (SLV44_SAP_Amount
2__c >=
SLV44_Quoted_Price
__c) OR
(SLV44_SAP_Amount
3__c >=
SLV44_SAP_Amount
2__c)

o Error Message

■ Scaling
Price does
not fit this
rule :
Quoted
Price >=
Price
(Bracket 2)
>= Price
(Bracket 3).
Please
update
prices.

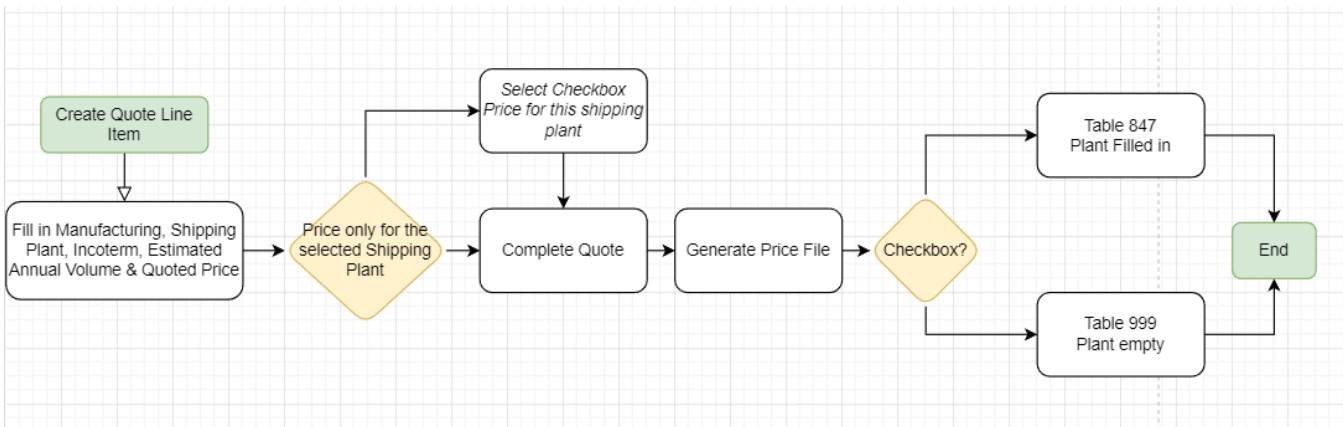
- The Minimum price set here will be used in the Approval Process : [FD - \[CORE\] 5 - Approval](#)

If the user unsets the "Enable Scale Pricing" all the bracket and price are set to null.

1.12 / specific shipping plant

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Let the Account manager have the possibility to decide if my price applies to a specific shipping plant or to all.



This field is used in both fields : SLV44_SAP_Plant & SLV44_SAP_Table from OQLI.

See the detail here : [SF - Novocare - Data push to SAP](#)

1.13 / Created from CPC

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If the Display the field "Created by CPC" in the OQLI - SLV48_Created_by_CPC_c in the OQLI LWC as a blue label below Scatter Plot

Only display it if the value is TRUE

1.14 / Status

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At every OQLI we calculate a Status on the fly.

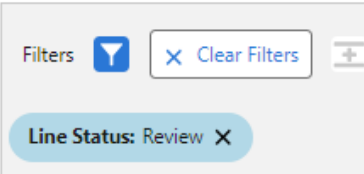
1/ The line has all valid settings and it has a Scale Pricing

2/ There is a warning on the line such as missing information, it blocks the status to be moved to Send for Approval

3/ The line has all valid settings

Compact Report Add Product				
Noted price	ICM%	Status	Action	
EUR 2.09	-56.46%	 1		
EUR 1.00	-108.00%	 2		
EUR 4.09	55.00%	 3		

The Account manager is able to filter it if needed in order to eas the process to update lines.



1.15 / Last Quoted price

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We calculate **Last Quoted Price & Last Quoted Quote Line** when we insert a line to a quote (add product or renew) :

- Status = Draft
- Every modification of “Account OR Region OR BU OR Product Level 5 OR Manufacturing Plant OR Shipping Plant OR Incoterm OR Ship-to”

“We need to find the last quoted price send to SAP”

The last quoted price logic is as the following

- We try to find first an Active QLI with the key : Account + Region + BU + Product Level 5 + Manufacturing Plant + Shipping Plant + Incoterm + Ship-to + **Status = Closed Sales Started + SLV44_Is_Active__c = True + Accepted by Customer = True**
- If not, we look up the most recent- QLI (quote.SLV44_Quote_valid_to_External__c most recent) in Closed Sales Started & Accepted by Customer = true
 - Account + Region + BU + Product Level 5 + Manufacturing Plant + Shipping Plant + Incoterm + Ship-to + **Status = Closed Sales Started + Accepted by Customer = True**
- If not, we look up the most recent - QLIs (quote.SLV44_Quote_valid_to_External__c most recent) in Expired & Accepted by Customer = true
 - Account + Region + BU + Product Level 5 + Manufacturing Plant + Shipping Plant + Incoterm + Ship-to + **Status = Expired + Accepted by Customer = True**
- If nothing is found, then it displays empty.

Last Quoted price is displayed on the table view of the OQLI

2/ Price Settings / Calculations

==> [FD - \[CORE\] Quote Price Settings](#)

Freight Guidance Granularity Display

Every time relevant information change in the Quote we reset the following records in the OQLI :

- Manufacturing Plant
 - Set by user, see 1.1
- Shipping Plant
 - Set by user, see 1.2
- Region and Market Pricing*
 - See 1.5
- Volume Bracket
 - See 1.5
- Freight Guidance
- Transfer Cost

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

The label (The label goes just under the Freight Cost)

Match Level	Message
-------------	---------

Based on these related record we set additional values in the quote. See table on the right

Ship-to Party /Material	Customer-Specific Rate
Plant /Product Group	Standard Group Rate
No Match	NO F&D GUIDANCE FOUND + Warning Icon  Unable to locate Jira server for this macro. It may be due to Application Link configuration.

Freight & Duty Guidance ⓘ



For the Help Text

1. **Customer-Specific Rate:** "Rate based on customer, material, incoterm. Highest accuracy level."
2. **Standard Group Rate:** "Derived from plant origin, material group, incoterm. General estimation."
3. **Contact Supply Chain:** "No specific freight cost guidance available. You can contact your supply chain team for a more accurate estimation"

3/ Price Settings inactivation

[illegible]



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If an OQLI has price settings inactive
and the status of the quote is Draft then

- IF **OQLI.Price Setting Active**
= FALSE && Quote.Status =
DRAFT THEN:
 - Disable all fields
(except Delete
button) of the Line
Item and set a
banner message on
top of the Line Item
with the following
message:
 - "This Line
does not
have an
active price
setting : " +
OQLI.Price
Setting
inactive
Reason

4/ VAT

We allow the Account manager to
select the "Display VAT" Option.

If the box is ticked then the quoted
price including VAT is added in bracket
close the quoted price.

Here is how VAT is Calculated : [FD -
\[CORE\] - Quote PDF Details](#)

Product(s)
[Click here for compact format edit](#)

☒ Display VAT [Add Product](#) [Send for Approval](#)

Product & Plant	Customer & demand	Price Guidance	Quoted price	Approval & Feedback	Supply & Legal info	Actions
Product Level 4 (Product) IGEPAL DAP-AT	* Ship-to CHENMORE L. X	Margin Guidance 131 EUR/KG	* Quoted price EUR (with VAT: 141,25 EUR/KG	Rationale New customer	Legal entity Search Legal on Q	
Product Level 5 (Material) IGEPAL DAP-AT BULK	* Incoterms PPD	Margin Floor 111,00 EUR/KG	Discount ICM% 0%	Description	Contractual commitment Soft quote (att...)	
* Manufacturing Plant	Estimated Annual Volume KG	Variable Cost 11,00 EUR/KG	ICM% Nearby 91,87%	Special customer		