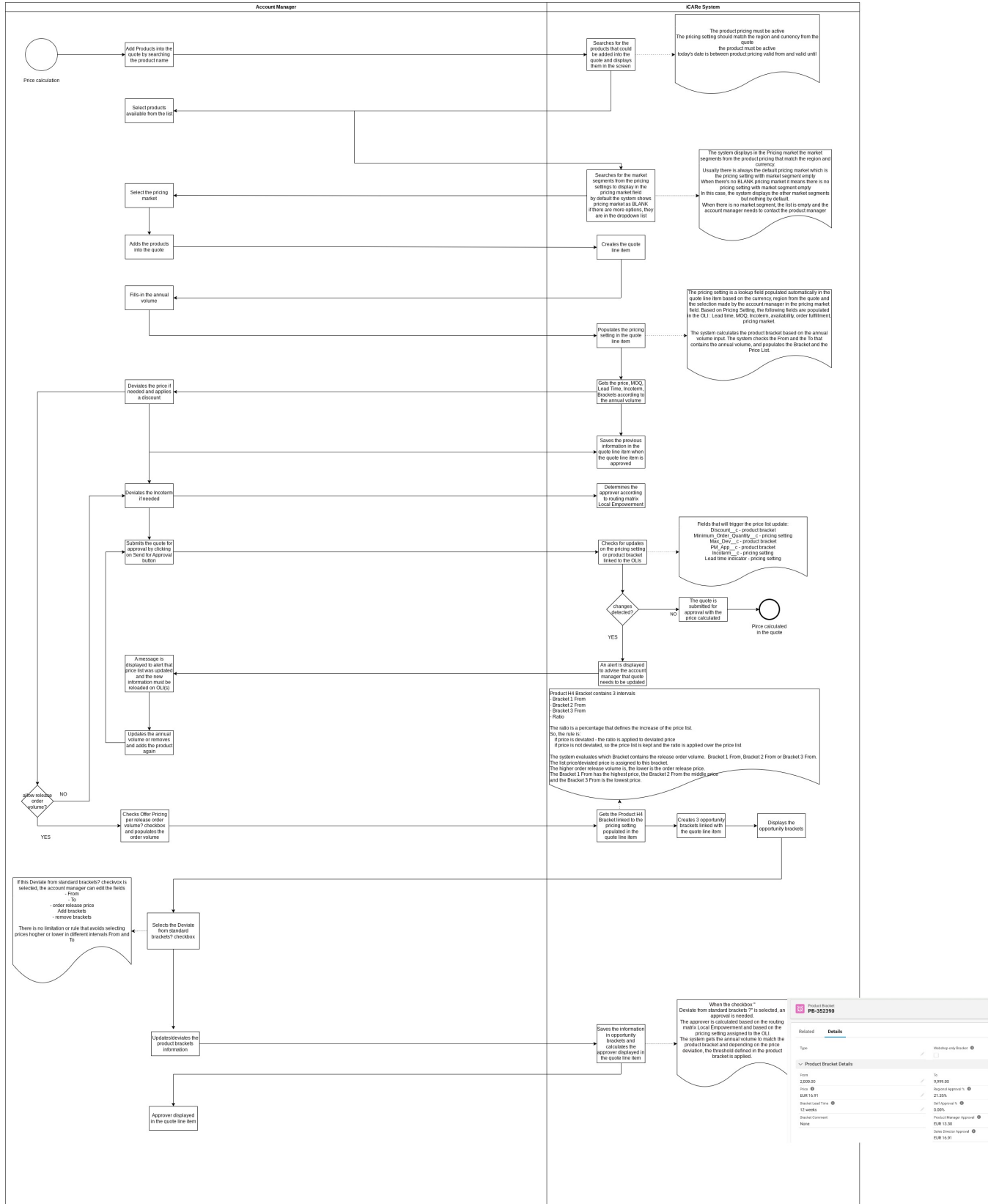


# FD - [iCARE] Price Settings (SPP)

## Price Calculation in Quotation

Diagram Flow: <https://app.diagrams.net/#G1nsl4vueVdljvsfdWcYxlyW4btX4WrkeW>



When the Product Hierarchy 4 is selected or updated in the Product page layout, the Product H4 Bracket linked to the Product Hierarchy 4 is automatically copied from the system into the pricing settings linked to the active product pricing for the product.

## Price Update in Quotation

When the price list is updated, all the quotes in draft will be impacted.

The system will not update the draft quotes immediately, but only when the account manager clicks on "Send for Approval" button.

After clicking on the button, there's a message displayed on the top of the page, advising the account manager that there's new information in the price list for one or more specific products that must be updated into the quote.

The screenshot shows a Salesforce interface with a notification banner at the top. The banner is red and contains the text: "The Price List for the product(s) TECNOFLON FOR 4353 \*SM-CZ was updated, so please update the annual volume in order to bring the most updated information from the price list into the quote." Below the banner is a table titled "Product(s)" with columns for Product Info, Yearly Volume, and Price & discount. The table contains three rows of product data. At the bottom right of the table area is a "Send To Approval" button.

Product Info		Yearly Volume		Price & discount						
Product	Pricing Market	* Annual Volume	Bracket	Price List	Last Quote Price	Scatter Plot	Variation vs Price list	Quote Price (after discount)	Financial impact	Ratio
TECNOFLON FOR 335 *SM-CZ	BLANK	Kg 40,067.00	12000 - 999999 Kg	40.60 EUR / Kg		Link	53.99%	EUR / Kg 18.68	-878268.64 EUR	Otl
TECNOFLON FOR 4353 *SM-CZ	BLANK	Kg 5,606.00	3000 - 11999 Kg	33.78 EUR / Kg		Link		EUR / Kg 33.78	0 EUR	Co
TECNOFLON FOR 4353 *SM-CZ	BLANK	Kg 5,000.00	3000 - 11999 Kg	33.00 EUR / Kg		Link		EUR / Kg 33.00	0 EUR	-Nr

[Send To Approval](#)

He is forced to accept the changes, otherwise is not possible to submit the quote for approval.

The Account Manager needs to take one of the following actions:

- remove the product and add the product again by clicking on "Add Product" button
- update the annual volume for something different from the previous value (e.g. if the annual volume now is 2000, update it to 2001 and then back to 2000)


After that, the system loads the most recent price into the quote and the account manager is able to click on "Submit for Approval" button again in order to send the quote for approval and finalize the process.


Jira story

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

## Auto-Maintain Feature

iCARE Auto-Maintained Epics Links:

 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.


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

Diagram Flow: <https://app.diagrams.net/#G1WkhoxMnYdHxfplABdbuKjpo5s8OUvnw>

## Which Prices can be auto-maintained?

The auto-maintain is an automation implemented in the system to automatically create/update/delete the price list for Korea, India and China. The process is running daily over night (GMT).

The auto-maintain was enabled manually for the pricing settings provided by the business (not all the pricing settings are auto-maintained) that match the following criteria:

- the pricing setting currency is USD (the auto-maintained is only working for USD currency)
- the pricing setting Region & Incoterms is one of the combinations in the table below:

Currency	Region	Incoterms
USD	China	EXW, CIP, CFR, CIF
USD	India	EXW, CIP, CFR, CIF
USD	Korea	DDP



Pricing Setting  
**PS-127984**

Related

**Details**



**Auto Maintained**

Auto maintained in local currency? ⓘ



Pricing Setting Name  
**PS-127984**

Product Manager  
**Mahesh Padigala**

Product  
[PK KT-880 GF30 BG20](#)

Owner  
 [Mahesh Padigala](#)

Product Pricing  
[PP-104482](#)

Currency  
**USD - U.S. Dollar**

Valid From  
**09/11/2022**

Currency  
**USD**

Valid Until  
**31/12/2023**

Bracket Type  
**Annual Volume**

Product Pricing History

Setting Comment  
**None**

Commercial Status  
**Commercial**

Abacus

Lead Time Indicator ⓘ  
**16 weeks**

Auto-Maintained From

Minimum Order Quantity  
**200.000**

Incoterm  
**EXW**

Display in views?

Region  
**China GCT**

Market Segment

The auto-maintain feature creates automatically Pricing Settings and Product Brackets with the price in the local currencies with specific Incoterms.

Region	Local Currency	Incoterms
China	CNY	DDP
India	INR	EXW
Korea	KRW	DDP

The “Auto maintained in local currency?” checkbox is **hidden** when

- the currency is not USD or
- the region is not China, India or Korea or



Pricing Setting  
**PS-120976**

Related **Details**

Pricing Setting Name PS-120976	Product Manager Mahesh Padigala
Product <a href="#">PK KT-880 GF30 BG20</a>	Owner <a href="#">Maahesh Padigala</a>
Product Pricing <a href="#">PP-104482</a>	Currency EUR - Euro
Valid From 09/11/2022	Currency EUR
Valid Until 31/12/2023	Bracket Type Annual Volume
Product Pricing History	Setting Comment None
Commercial Status Commercial	Abacus <input type="checkbox"/>
Lead Time Indicator ⓘ 14 weeks	Auto-Maintained From
Minimum Order Quantity 200.000	
Incoterm CIP	
Display in views? <input checked="" type="checkbox"/>	
Region Europe	
Market Segment	

- the Product Pricing is not Valid.



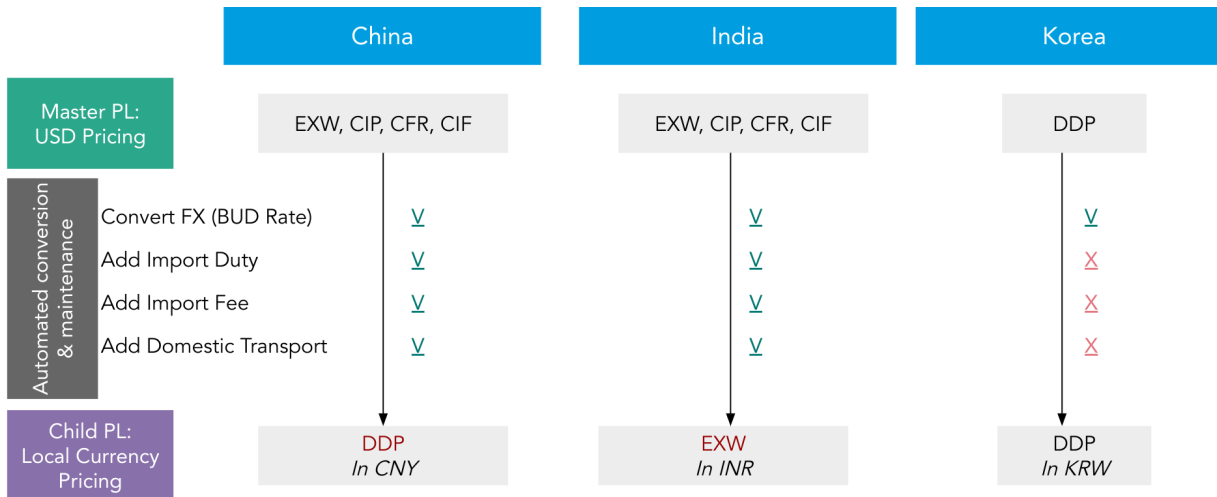
Product Pricing  
**PP-3333**

Related **Details**

Product Pricing Name PP-3333	Valid_Active <input type="checkbox"/>
Product Family Amodel	Valid ? 
Product <a href="#">Test Product 2</a>	Product Manager Matthias Eck
Currency EUR - Euro	18D Product Pricing ID a156000000jNdIAAU
Owner <a href="#">Sebastien Petillon</a>	
<b>Product Pricing Setup</b>	
Valid From 01/09/2022	Valid Until 06/09/2022
Created By <a href="#">Marco van der Mark</a> , 06/04/2012 09:03	Last Modified By <a href="#">Susana Alves</a> , 06/09/2022 20:42

**Auto\_maintain price calculation:**

Depending on the region and incoterms, the calculation of the price includes the conversion from USD to the local currency plus some extra charges like Import Duty, Import Fee and Domestic Transportation, also based on Product Family.



The local prices are calculated based on:

- Currency Exchange rate maintained in ICare - Manage Currencies rates in the setup
- Import duties, Import fees and Domestic Transport managed by SC in this file and uploaded in ICare in the custom object [Auto\\_Maintained\\_Price\\_Setting\\_\\_c](#)
- The import duties and the additional charges can be different within one product family. eg. Ryton anti-dumping
- Any change to the Currency Exchange rates and or additional charges percentages will be reflected into the auto-maintained prices over night

In the [Auto\\_Maintained\\_Price\\_Setting\\_\\_c](#), the system follows the logic below to determine the charges to apply:

- searches if the material group code exists
  - if yes, gets the import duty, import fee and domestic transportation changes from the record that matches (only one record per material group code)
  - if not, continues
- searches if the product family and pricing region exists
  - if yes, gets the import duty, import fee and domestic transportation changes from the record that matches (only one record per material group code)
  - if not, nothing to apply

### Price Calculation Example

Local Currency Price = USD price \* Currency Exchange Rate \* (1+ import duty%+ duty fee% + domestic transportation%)

Example 1: PPS -R-7-121B / Import Duty: 214%

CNY price list = 10.62 USD/kg \* 6.3 \* (1+ 214% + 1% +1%) = 211.4 CNY/KG

Example 2: Veradel PESU A-301 GN001 import duty changes from 8.5% to 10%

INR new price/old price = (1+ 10%+1%+1%) / (1+8.5%+1%+1%) = 1.01 1% increase in local price

### Auto-maintained restrictions:

If the price is auto-maintained, perform the changes only into the parent price in USD.


Changes on USD Pricing Settings (MOQ, LT, order fulfillment, price, etc) or Product Brackets (price, approval%, etc) will be automatically cascaded daily into local currency Price Setting or Product Brackets.

Any changes performed on local currency (PS or PB) will be overwritten (and lost) by the daily refresh with the data from the Master Price List in USD.

The system does not allow any product manager to change the information in the auto-maintained pricing settings and product brackets, except deactivate the auto-maintain feature/flag.

Only data stewards and system administrators are allowed to change auto-maintained prices, however, the automated process running over night is smashing all the changes.

An auto-maintained pricing setting presents a message on the top of the page to alert that the price is being auto-maintained.

 Pricing Setting  
**PS-125209**


---

Related **Details**

---

**This price is automaintained: make sure to only perform changes into the parent PL in USD.**  
*These prices are refreshed daily based on the value of the parent PL in USD: any changes performed on this PL will be overwritten.*

---

Pricing Setting Name PS-125209	Product Manager Mahesh Padigala
Product <a href="#">PK KT-880 GF30 BG20</a>	Owner  <a href="#">Mahesh Padigala</a>
Product Pricing <a href="#">PP-104482</a>	Currency CNY - Chinese Yuan
Valid From 09/11/2022	Currency CNY
Valid Until 31/12/2023	Bracket Type Annual Volume
Product Pricing History	Setting Comment NOTE: Prices do NOT include VAT.
Commercial Status Commercial	Abacus <input type="checkbox"/>
Lead Time Indicator ⓘ 16 weeks	Auto-Maintained From <a href="#">PS-127984</a>

The Product Manager can deactivate the auto-maintain feature - he goes into the Pricing Setting and deselect the checkbox "Auto maintained in local currency?"

Pricing Setting  
**PS-127984**

Related **Details**

**Auto Maintained**

Auto maintained in local currency?

Pricing Setting Name PS-127984	Product Manager Mahesh Padigala
Product <a href="#">PK KT-880 GF30 BG20</a>	Owner <a href="#">Maresh Padigala</a>
Product Pricing <a href="#">PP-104482</a>	Currency USD - U.S. Dollar
Valid From 09/11/2022	Currency USD
Valid Until 31/12/2023	Bracket Type Annual Volume
Product Pricing History	Setting Comment None
Commercial Status Commercial	Abacus <input type="checkbox"/>
Lead Time Indicator 16 weeks	Auto-Maintained From
Minimum Order Quantity 200,000	
Incoterm EXW	
Display in views? <input checked="" type="checkbox"/>	
Region China GCT	
Market Segment	

The Product Manager can see if the auto-maintained is enabled or not, through the grids but he cannot change the auto-maintained field in Grids..

Sandbox: Auto-Maintained Pricing Setting PS-166263 has been reactivated Inbox x



Ahir Mathkar

to james.flock@solway.com, chang.liu@solway.com, Sindija.Vuskane@solway.com, roberta.navone@solway.com, me, gowtham.chalamcharla-ext@solway.com, paulo.mussiniate@solway.com, ahir.mathkar@solway.com

9:14 AM (2 hours ago)



The auto-maintain was re-enabled for [PS-166263](#).

**Product Manager of  
the reactivated  
Pricing Setting:**

Ahir Mathkar

**Pricing Setting in  
USD reactivated:**  
PS-166263

**AUTO MAINTAINED IN LOCAL CURRENCY?** - if checked, indicates that the Pricing Setting in USD is enabled to be auto-maintained in the local currency (CNY, INR, KRW)

**AUTO MAINTAINED** - if checked, indicates that the Pricing Setting is created automatically through the auto-maintained feature.

## Email Notifications sent to the Data Steward

There are 2 types of notifications that are sent to the data stewards:

- Every time the Product Manager deactivates an auto-maintained pricing setting

Sandbox: Auto-Maintained Pricing Setting PS-166263 has been disabled Inbox x



Ahir Mathkar

to james.flock@solway.com, chang.liu@solway.com, Sindija.Vuskane@solway.com, roberta.navone@solway.com, me, gowtham.chalamcharla-ext@solway.com, paulo.mussinhat@solway.com, ahir.mathkar@solway.com

9:07 AM (2 hours ago)



The auto-maintain was disabled for [PS-166263](#).

**Product Manager of  
the deactivated  
Pricing Setting:**

Ahir Mathkar

**Pricing Setting in  
USD deactivated:  
PS-166263**

- every time the Product Manager activates or re-activates the auto-maintain in a pricing setting

Sandbox: Auto-Maintained Pricing Setting PS-166263 has been reactivated Inbox x



Ahir Mathkar

to james.flock@solway.com, chang.liu@solway.com, Sindija.Vuskane@solway.com, roberta.navone@solway.com, me, gowtham.chalamcharla-ext@solway.com, paulo.mussinhat@solway.com, ahir.mathkar@solway.com

9:14 AM (2 hours ago)



The auto-maintain was re-enabled for [PS-166263](#).

**Product Manager of  
the reactivated  
Pricing Setting:**

Ahir Mathkar

**Pricing Setting in  
USD reactivated:  
PS-166263**

The actions that need to be taken by the Data Steward are:

- when the auto-maintained was deactivated on the pricing setting in USD:
  - Go into the Pricing Setting record received on the email, click on Product Pricing, tab Related, Pricing Settings, View All and open the Pricing Setting in the Local Currency
  - update Auto-Maintained field on the Pricing Settings in the local currency to false
  - keep the Auto\_maintained From Id
- update the Auto-Maintained field on the Product Brackets in the local currency to false
- keep the Auto\_maintained From Id



Related **Details**

**This price is automaintained: make sure to only perform changes into the parent PL in USD.**

*These prices are refreshed daily based on the value of the parent PL in USD: any changes performed on this PL will be overwritten.*

Pricing Setting Name PS-125209	Product Manager Mahesh Padigala
Product <a href="#">PK KT-880 GF30 BG20</a>	Owner <a href="#">Mahesh Padigala</a>
Product Pricing <a href="#">PP-104482</a>	Currency CNY - Chinese Yuan
Valid From 09/11/2022	Currency CNY
Valid Until 31/12/2023	Bracket Type Annual Volume
Product Pricing History	Setting Comment NOTE: Prices do NOT include VAT.
Commercial Status Commercial	Abacus <input type="checkbox"/>
Lead Time Indicator ⓘ 16 weeks	Auto-Maintained From <a href="#">PS-127984</a>

- when the auto-maintained was re-activated on the pricing setting in USD:
  - Go into the Pricing Setting record received on the email, click on Product Pricing, tab Related, Pricing Settings, View All and open the Pricing Setting in the Local Currency
  - update the field Auto-Maintained in the Pricing Setting in the local currency to true
  - confirm that Auto-Maintained From field is populated with the Pricing Setting in USD
  - update the field Auto-Maintained Product Brackets in the local currency to true
  - confirm that Auto-Maintained From field is populated with the Product Bracket in USD
  
- when the auto-maintained was activated for the first time on the pricing setting in USD:
  - Go into the Pricing Setting record received on the email, click on Product Pricing, tab Related, Pricing Settings, View All and open the Pricing Setting in the Local Currency
  - update the field Auto-Maintained in the Pricing Setting in the local currency to true
  - update the Auto-Maintained From field with the Pricing Setting in USD
  - update the field Auto-Maintained Product Brackets in the local currency to true
  - update the Auto-Maintained From field with the Product Bracket in USD

**Manage people that receive auto-maintain notifications:**

There is a custom metadata named **PP Control Panel** to configure the emails from the people that is added in the CC of the email, to receive the notifications when the product manager deactivates or re-activates the auto-maintain.

PP Control Panel

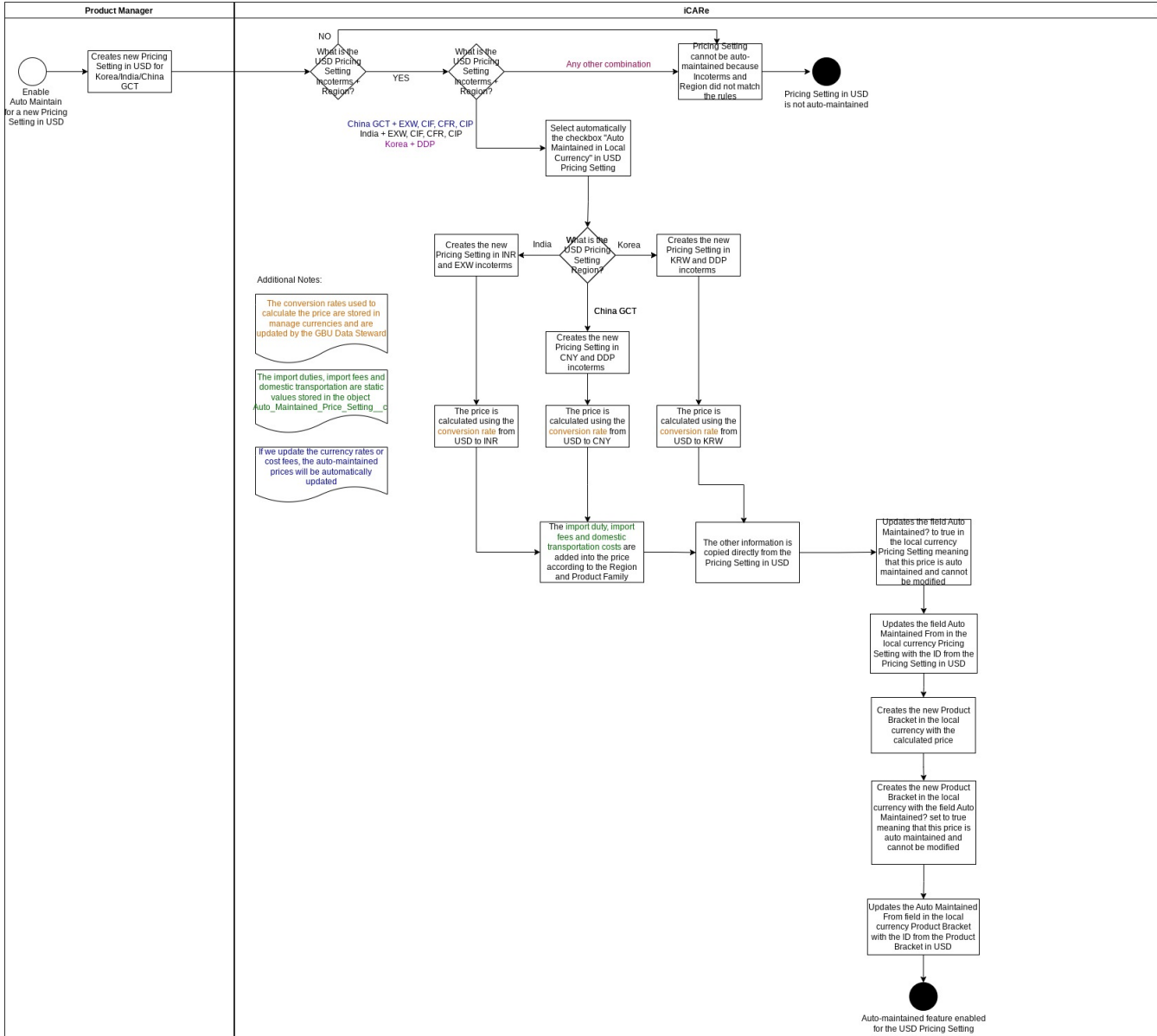


PP Control Panel Detail

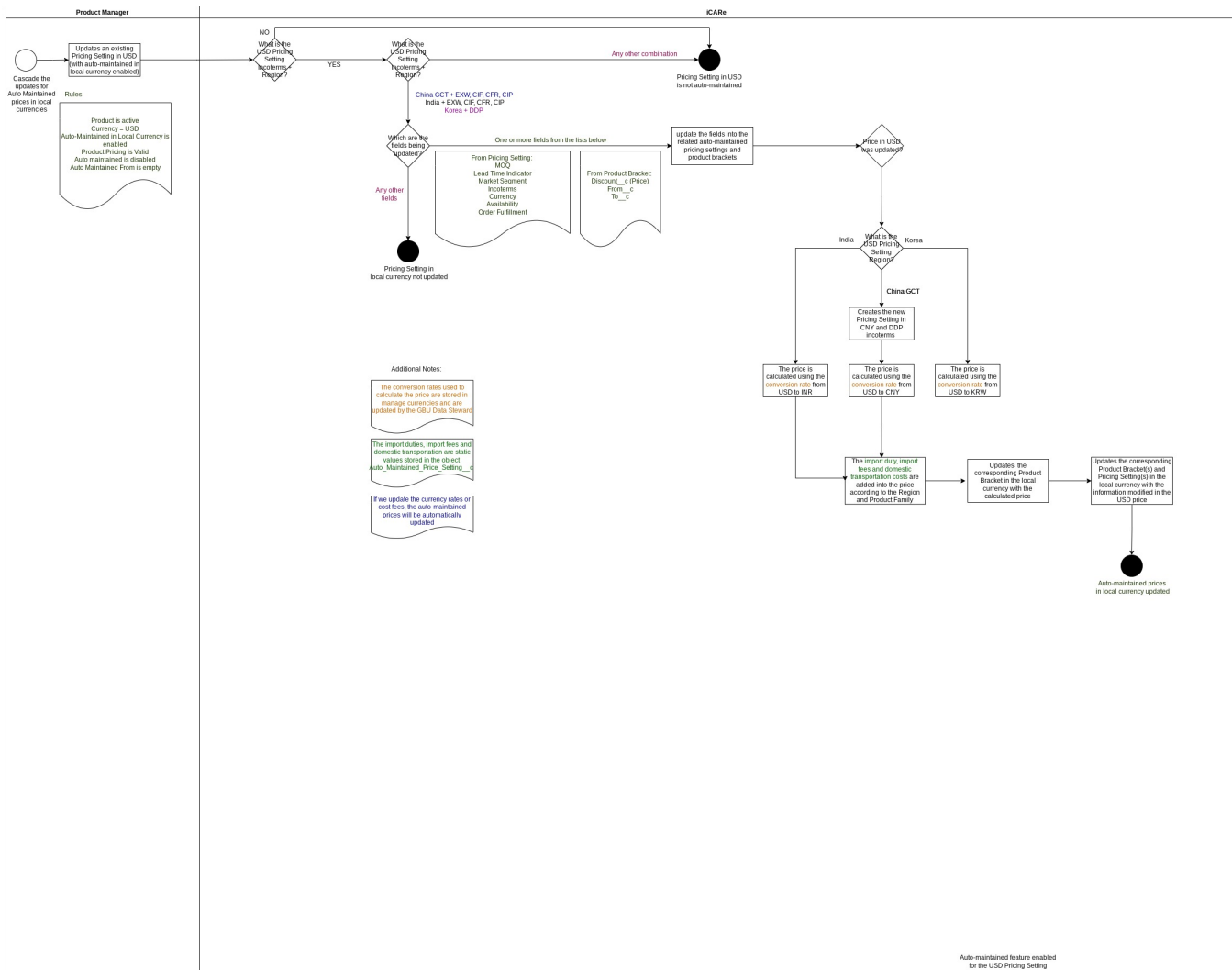
[Edit](#) [Delete](#) [Clone](#)

Label	default	Protected Component	<input type="checkbox"/>
PP Control Panel Name	default	Namespace Prefix	
Email(s)	<a href="mailto:james.flock@solway.com">james.flock@solway.com</a> <a href="mailto:chang.liu@solway.com">chang.liu@solway.com</a> <a href="mailto:sindija.vuskane@solway.com">sindija.vuskane@solway.com</a> <a href="mailto:paulo.mussinhati@solway.com">paulo.mussinhati@solway.com</a> <a href="mailto:natacha.prenen@solway.com">natacha.prenen@solway.com</a>		
Created By	Admin User, 06/12/2022 12:35	Last Modified By	Admin User, 17/01/2023 11:15

# Auto-Maintain process when a new Pricing Setting in USD is created



# Auto-Maintain process when an existing Pricing Setting in USD is updated



## Auto-Maintain process when the auto-maintained feature is disabled for an existing Pricing Setting in USD

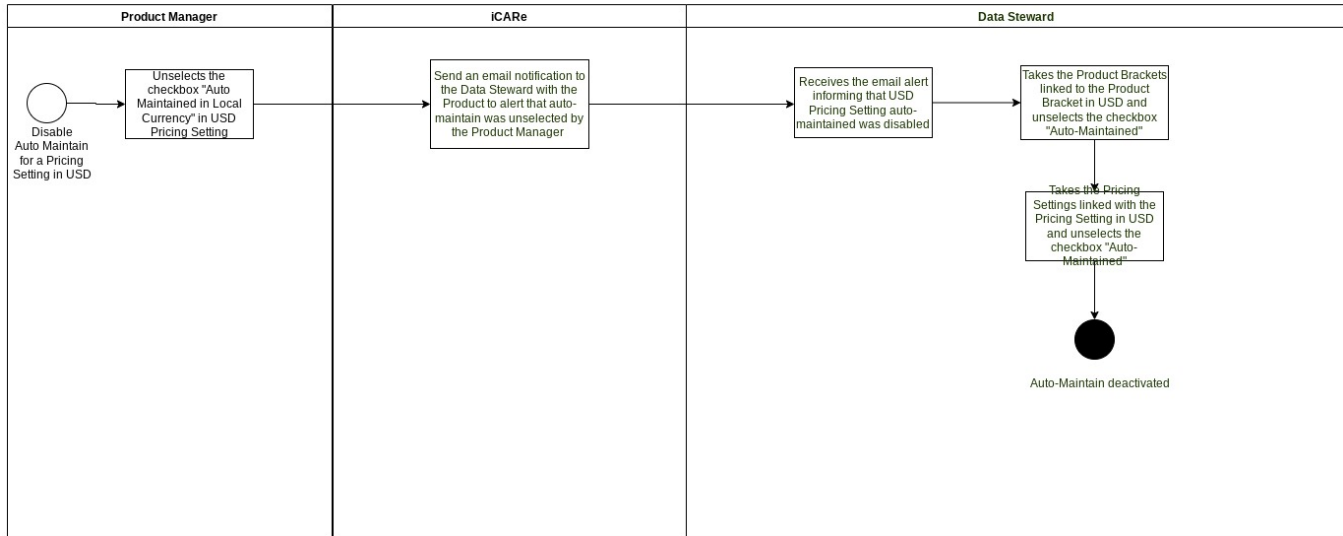
Including the manual steps that must be performed by the data stewards

**Disable the Auto-Maintain for a certain USD Price  
Ask the Data Steward to perform it.**

The automated process is not prepared to adjust the Pricing Setting and Product Bracket(s) records in the local currency accordingly.

If you disable the "Auto-Maintain in local currency" checkbox yourself (as a Product Manager), the Pricing Setting in USD will be marked as not auto maintained anymore, however the Pricing Settings in local currency (CNY, INR, KWR) remain as auto-maintained.

The Data Steward needs to clean the field Auto-Maintained From and uncheck the Auto-Maintained checkbox in the local Pricing Setting and Product Bracket(s).



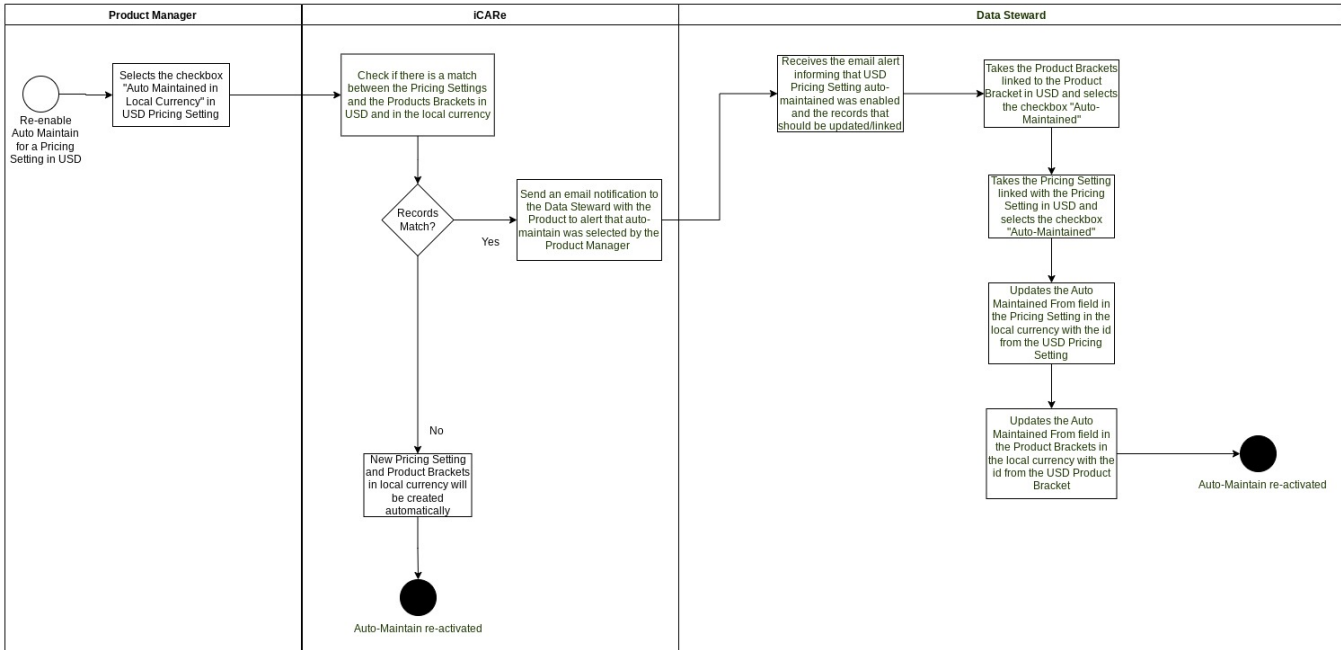
**Auto-Maintain process when the auto-maintain feature is reactivated for an existing Pricing Setting in USD**

Including the manual steps that must be performed by the data stewards

**Re-enable the Auto-Maintain for a certain USD Price  
Ask the Data Steward to perform it.**

The automated process is not prepared to adjust the Pricing Setting and Product Bracket(s) records in the local currency accordingly. If you enable again the "Auto-Maintain in local currency" checkbox yourself (as a Product Manager), the Pricing Setting in USD will be marked as auto maintained, however the Pricing Settings in local currency (CNY, INR, KWR) remain auto-maintained.

- The Data Steward needs to
- populate the field Auto-Maintained From with the USD Pricing Setting ID in both Pricing Setting and Product Bracket(s)
  - select the Auto-Maintained checkbox in the local Pricing Setting and Product Bracket(s).



## IMPORTANT REMARK ABOUT AUTO-MAINTAIN

If a product is set to inactive, the product manager must contact the data steward to disable the auto-maintain feature in all the pricing settings in USD linked to this product.

What needs to be done is: unselect the field "Auto maintained in local currency?" on pricing settings in USD.

**Pricing Setting PS-127845**

**Auto Maintained**

Auto maintained in local currency?


**Details**

Pricing Setting Name	Product Manager
PS-127845	Florence BUSSOD
Product	Owner
<a href="#">PVDF 1015/1001</a>	<a href="#">Florence BUSSOD</a>
Product Pricing	Currency
<a href="#">PP-104395</a>	USD - U.S. Dollar

Documentation about Auto-Maintain:

## Product H4 Brackets creation

When a product hierarchy 4 is created, 3 product H4 brackets are created and the prices proposed for each range From-To are calculated based on the Ratio field.


 Product H4 Bracket  
**PH4B-0002715**

---

Related Details


---

∨ Bracket for order release quantities

Product Hierarchy 4	Unit of Measurement
<a href="#">Aquivion</a>	Kg
Product H4 Name	Bracket 1 From
Aquivion 	0
	Bracket 2 From
	1,000
	Bracket 3 From
	10,000



---

∨ Price discount

Ratio
5.00% 

---

∨ System Information

Created By	Last Modified By
 <a href="#">Admin User</a> , 28/04/2022 12:05	 <a href="#">Admin User</a> , 28/04/2022 12:05

```
File Edit Selection View Go Run Terminal Help
ECCOSalesQuoteService.cs - solvay UAT - Visual Studio Code
EmailOfferPdf.page Opportunity_Line_Item_Tri... ECCOSalesQuoteService.cs X OpportunityUtil.cs package.xml
force-app > main > default > classes > ECCOSalesQuoteService.cs
294 Decimal minimumOrderQuantity = settingsById.get(oli.Pricing_Setting__c).Minimum_Order_Quantity__c;
295 productH4Bbracket = productH4BbracketByPricingSettingIdMap?.get(oli.Pricing_Setting__c);
296 if(productH4Bbracket != null){
297     String unitOfMeasurement = settingsById.get(oli.Pricing_Setting__c).Unit_of_Measurement__c;
298     bracket1From = convertBracketValue(unitOfMeasurement, productH4Bbracket.Basket_1_From__c);
299     bracket2From = convertBracketValue(unitOfMeasurement, productH4Bbracket.Basket_2_From__c);
300     bracket3From = convertBracketValue(unitOfMeasurement, productH4Bbracket.Basket_3_From__c);
301     bracket1To = adjustBracketValueByMeasurement(unitOfMeasurement, convertBracketValue(unitOfMeasurement, productH4Bbracket.Basket_2_From__c));
302     bracket2To = adjustBracketValueByMeasurement(unitOfMeasurement, convertBracketValue(unitOfMeasurement, productH4Bbracket.Basket_3_From__c));
303
304     if(bracketOrigin == ECCOSalesQuoteConstants.RELEASE_ORDER_BRACKET_TYPE_ORIGIN_OFFER_PRICE){
305
306         ratio = productH4Bbracket.Ratio__c / 100;
307         price = oli.Deviated_Price__c != null ? oli.Deviated_Price__c : oli.UnitPrice__c;
308
309         if(oli.Quantity__c >= bracket3From) {
310             //large bracket
311             bracket1Price = price * (1 + ratio);
312             bracket2Price = price * (1 + 2.0/3.0 * ratio);
313             bracket3Price = price;
314         } else if(oli.Quantity__c >= bracket2From) {
315             //medium bracket
316             bracket1Price = price * (1 + ratio) / (1 + 2.0/3.0 * ratio);
317             bracket2Price = price;
318             bracket3Price = price / (1 + 2.0/3.0 * ratio);
319         } else {
320             //small bracket
321             bracket1Price = price;
322             bracket2Price = price * (1 + 2.0/3.0 * ratio) / (1 + ratio);
323             bracket3Price = price / (1 + ratio);
324         }
325     } else {
326         bracket1Price = price;
327         bracket2Price = price;
328         bracket3Price = price;
329     }
330     toReturn.put(oli.Id, new List<Opportunity_Bracket__c>());
331
332     if(bracket1To > minimumOrderQuantity) {
333         Opportunity_Bracket__c bracket = createOppBracket(minimumOrderQuantity, minimumOrderQuantity, bracket1To, bracket1Price, oli, accMap.get(oppM
334         toCreate.add(bracket);
335         toReturn.get(oli.Id).add(bracket);
336     }
337
338     if(bracket2To > minimumOrderQuantity) {
339         Opportunity_Bracket__c bracket = createOppBracket(minimumOrderQuantity, bracket2From, bracket2To, bracket2Price, oli, accMap.get(oppMap.get(o
340         toCreate.add(bracket);
341         toReturn.get(oli.Id).add(bracket);
342     }
343 }
```

## Price List Data Model