

TD - [core] Pricing Campaign

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Version Control

Version	Date	Description	Author
V1.0	22/03/2023	Original version	Anton Solomin

Reference Documents

Description	Document Link

Definitions

Abbreviation	Definition
CRM	Customer Relationship Management

Introduction

• Overview

This is the documentation for the CORE's Pricing campaign module

• Purpose of this document

The purpose of this document is to explain the purpose of system components, behavior and it's structure for the Pricing Campaign module.

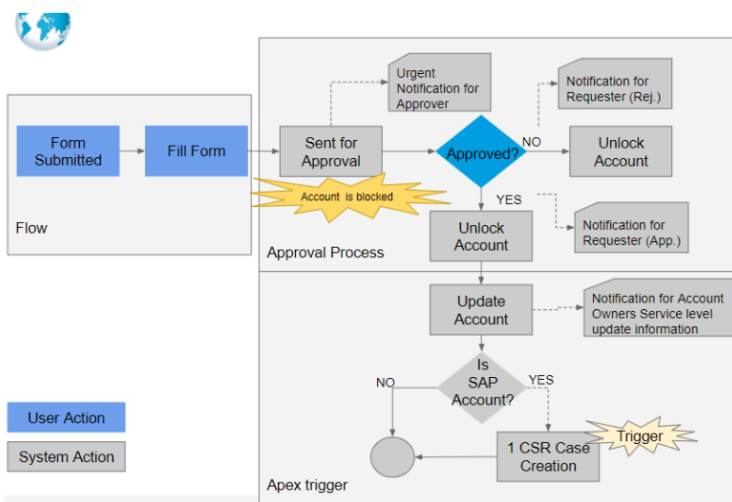
Pricing Campaign Technical Documentation

• Technical Solution Overview

<Include all actions performed by Users Or System that will trigger System Actions to run (Workflows, triggers, flows, assignment rules, approval processes, email notification, Account Locks, components), if the process is too complex to describe in one diagram only, you can split it by Feature, or Phase, ...

Something Similar to the screenshot below (for the Actions refer the type of solution implemented including the names, example: Action: Update Account is being done by system using Apex, For Apex implementation: include what is being done before Insert/Update after Insert/Update

<include rationale of the technical decision, for example, we are using 2 RT, why we need a first one, and a Second One>



• Apex Trigger

It is agreed with the platform that Pricing Campaign CPC trigger is a 'heavy' object therefore we are not mixing flow triggers, process builders, workflows etc. with apex triggers. All related logic needs to be executed in the Apex trigger.

Context	Method	Description
Before insert	PP_Pricing_Campaign_CPC_Helper.doSetDuplicationRuleUniqueField	Set a duplication rule helper to prevent duplicate CPCs.
	PP_Pricing_Campaign_CPC_Helper.doSetCommittedPrice	Set committed price & committed price in local currency.
	PP_Pricing_Campaign_CPC_Helper.doSetAccountManagerReview	Set account manager review field.
	PP_Pricing_Campaign_CPC_Helper.doSetShipToRegion	Find and set ship-to region.
	PP_Pricing_Campaign_CPC_Helper.doCheckUtilities	Is the current user doesn't have bypass validation rules flag - validate utility lookups.
	PP_Pricing_Campaign_CPC_Helper.doCheckRegionMarketPricing	Is the current user doesn't have bypass validation rules flag - validate RMPs lookups.
	PP_Pricing_Campaign_CPC_Helper.doCheckIfProductsAllowedOnQuote	Is the current user doesn't have bypass validation rules flag - validate whether the product is allowed on the quote.
	PP_Pricing_Campaign_CPC_Helper.doPriceUpdate	
After insert	PP_Pricing_Campaign_CPC_Helper.doProcessQueue	Start a queueable method to update CPCs in an asynchronous manner to save the platform resources. This can only be used when updating the fields that we don't need to see immediately after update.
	doSetContractProduct	Set the contract product on the CPC.
	doSetSoldToRegion	Set the sold to region on the CPC.
	doSetFields	Set the owner, corporate sold-to, region-country-city and product level 2 fields on the CPC.
	doSaveLogs	Save the results of the queueable transaction on error in SLV5_1_App_Log__c so that they can be inspected later.
Before update	PP_Pricing_Campaign_CPC_Helper.doSetDuplicationRuleUniqueField	Set a duplication rule helper to prevent duplicate CPCs.
	PP_Pricing_Campaign_CPC_Helper.doSetPriceSettingsUpdated	Set a flag that notifies the user that prices have changed.
	PP_Pricing_Campaign_CPC_Helper.doSetCommittedPrice	Set committed price & committed price in local currency.

PP_Pricing_Campaign_CPC_Helper.doSetAccountManagerReview		Set account manager review field.
PP_Pricing_Campaign_CPC_Helper.doSetShipToRegion		Find and set ship-to region.
PP_Pricing_Campaign_CPC_Helper.doCheckUtilities		Is the current user doesn't have bypass validation rules flag - validate utility lookups.
PP_Pricing_Campaign_CPC_Helper.doCheckRegionMarketPricing		Is the current user doesn't have bypass validation rules flag - validate RMPs lookups.
PP_Pricing_Campaign_CPC_Helper.doCheckIfProductsAllowedOnQuote		Is the current user doesn't have bypass validation rules flag - validate whether the product is allowed on the quote.
PP_Pricing_Campaign_CPC_Helper.doSetFields		Set the owner, corporate sold-to, region-country-city and product level 2 fields on the CPC.

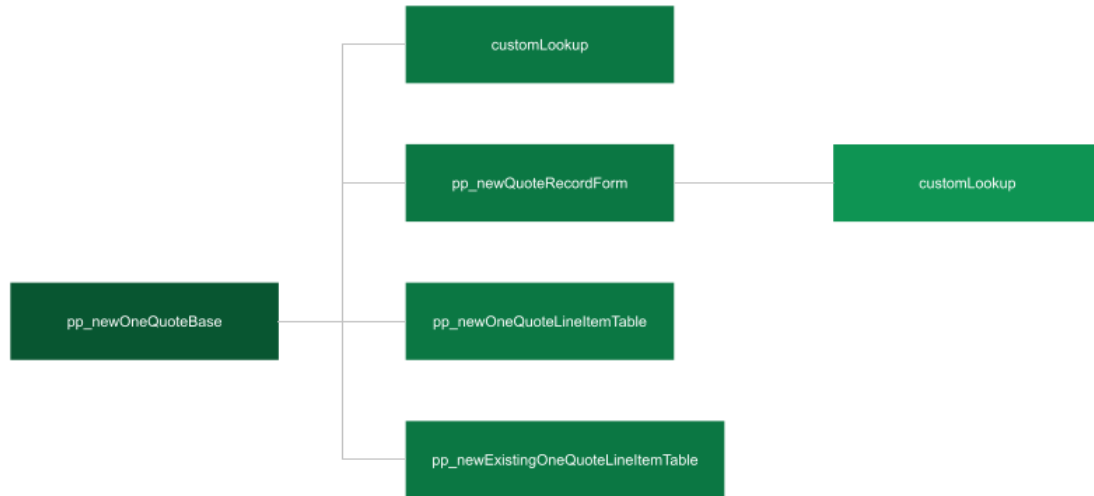
• Lightning Components

There's a number of LWC components that were created sometimes to extend the standard functionality and sometimes to accommodate completely custom logic not possible in standard. Here's an overview of LWC that are used in the Campaigns module:

LWC Name	Nested	Nested	Description	Why not standard (description for not standard at the time of implementation)
customLookup			A custom lookup component that is used to let the user select a lookup field based on a given logic. Used in several places in the application.	There's a standard lookup component, but there's no way to filter and sort the results.
customSelect			A custom select component that is used to display to the user a given set of options.	There's not a standard picklist with a search functionality.
gen_dictionary			A resource to hold final front-end variables.	A collection of static strings. Not possible in standard.
pp_newOneQuoteBase			This is the base component for the CPC to Quote flow.	This flow requires functionality that is not possible in standard.
	pp_newOneQuoteLineItemTable		A table that lets you select the CPCs that you want for a new Quote.	This is a standard data-table.
	pp_newQuoteRecordForm		This is the Quote form for the CPC to Quote flow that lets you set the fields.	This is a standard form with some custom functionality. Not possible in a completely standard form.
	pp_newExistingOneQuoteLineItemTable		A table that lets you select the One Quote Line Items from an Existing quote for a new Quote.	This is a standard data-table.
pp_pricingCampaignBase			This is the base component to present campaign's CPCs to the user. This is used on the flexipage for the pricing campaign.	This flow requires functionality that is not possible in standard.
	pp_pricingCampaignReportRedirect		A component to display a link to redirect the user to the appropriate report.	A custom redirect hypertext.
	pp_pricingCampaignFilters		This is a component that allows the user to filter through the CPCs to find the ones they need. Some values come preselected. When one value changes, all the other available values are updated. The CPCs with the applied filters are displayed below in the table.	No standard component available.
	pp_pricingCampaignCurrencyBox		This is component to display to the user the currency conversion between different records. It uses some currency that are listed in the metadata that this LWC reads.	No standard component available.
	searchPickList		Generic Custom Dropdown with Search LWC.	There's not a standard picklist with a search functionality.
	pp_pricingCampaignRow		This is a base component that displays all the CPC related fields on a single table 'line'.	This flow requires functionality that is not possible in standard.
		pp_pricingCampaignOutputField	This is a component that displays a field.	This is a standard field output with extended functionality.
		pp_pricingCampaignConversionOutput	A way to display to the user converted currency.	There's not a standard picklist with a search functionality.

	pp_pricingCampaignPagination		Custom pagination to improve usability of the page	No standard component available.
pp_pollQueueableResult			Poll results of the queueable job to process up to 200 OQLs.	No standard component available.
pp_cpcRecommendedPriceUpdaterBase			Update multiple CPCs with recommended price	No standard component available.

New Quote button flow LWC structure



The screenshot displays the Salesforce CRM Lightning interface. At the top, there is a navigation bar with various tabs like 'Home', 'Chatter', 'Analytics', etc. Below this, the main content area shows a 'Pricing Campaign' for 'Novicare Q1 2023 Pricing Campaign'. A modal window titled 'New One Quote' is open in the center, featuring a search bar for 'Select Sold To Account' and a list of results, with 'NUFARM SAS - 115940 / 58095 - France / COLOMBES' highlighted. The background page shows campaign details, including 'CPCs' and 'Details' sections, and a table of 'Last Sales Info'.

Novcare Q1 2023 Pricing Campaign

Owner: Andrew Oreskovich

Region: 1 Selected

Product Level 2: Select an Option

Contractual Commitment: Soft quote (allowing price renegotiation before end date)

Localization and Currency information: Region: EMEA, Unit of Measurement: Select

Information: Owner: Anton Solomin, Account (Sold To): NUFARM SAS, BU: Agro

Localization and Currency information: Region: EMEA, Unit of Measurement: Select

Price Increase % vs. last invoiced price: -41.46 %

Committed price impact: -1,053,043.75 EUR

New ICM per unit: -0.52 EUR/KG

New ICM%: -8.67 %

Price based on Margin square: 9.59 EUR/KG

Novcare Q1 2023 Pricing Campaign

Owner: Andrew Oreskovich

Region: 1 Selected

Product Level 2: Select an Option

Contractual Commitment: Soft quote (allowing price renegotiation before end date)

Localization and Currency information: Region: EMEA, Unit of Measurement: Select

Information: Owner: Anton Solomin, Account (Sold To): NUFARM SAS, BU: Agro

Localization and Currency information: Region: EMEA, Unit of Measurement: Select

Price Increase % vs. last invoiced price: -41.46 %

Committed price impact: -1,053,043.75 EUR

New ICM per unit: -0.52 EUR/KG

New ICM%: -8.67 %

Price based on Margin square: 9.59 EUR/KG

Final recommended price: 9.59 EUR/KG

Committed price (Document Currency EUR): 6.00 EUR/KG

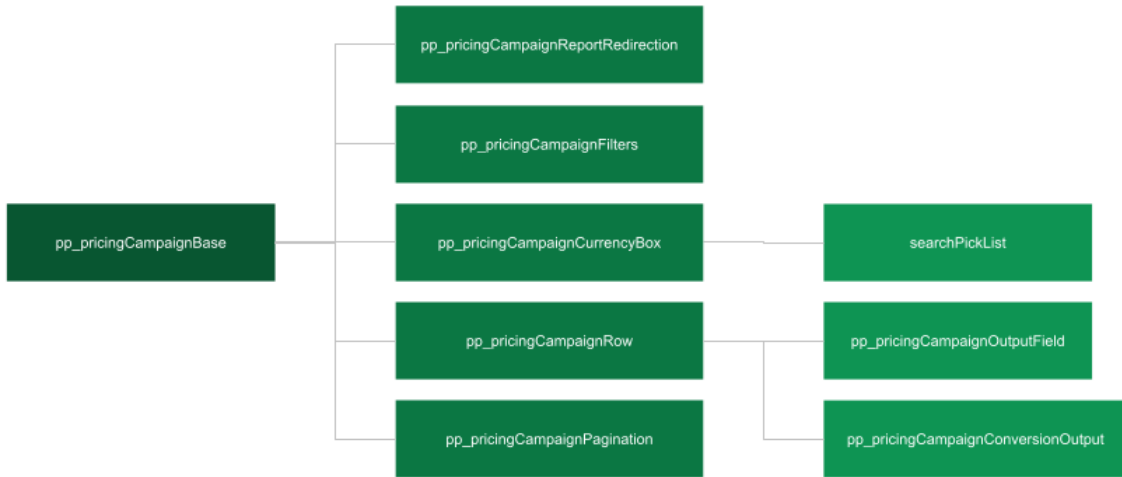
Reason for Deviation: Below Recommendation

Competitive threat: High

Comments: HQJHGHG

RMD Comments:

Pricing campaign table LWC structure



CRM Lightning interface showing a Pricing Campaign for Novocare Q1 2023. The page includes a navigation bar, a search bar, and a main content area with various filters and data tables.

Novocare Q1 2023 Pricing Campaign

Owner: Andrew Oreskovich | BU: GBU Novocare

CPC Details

Click to edit My CPCs in compact form

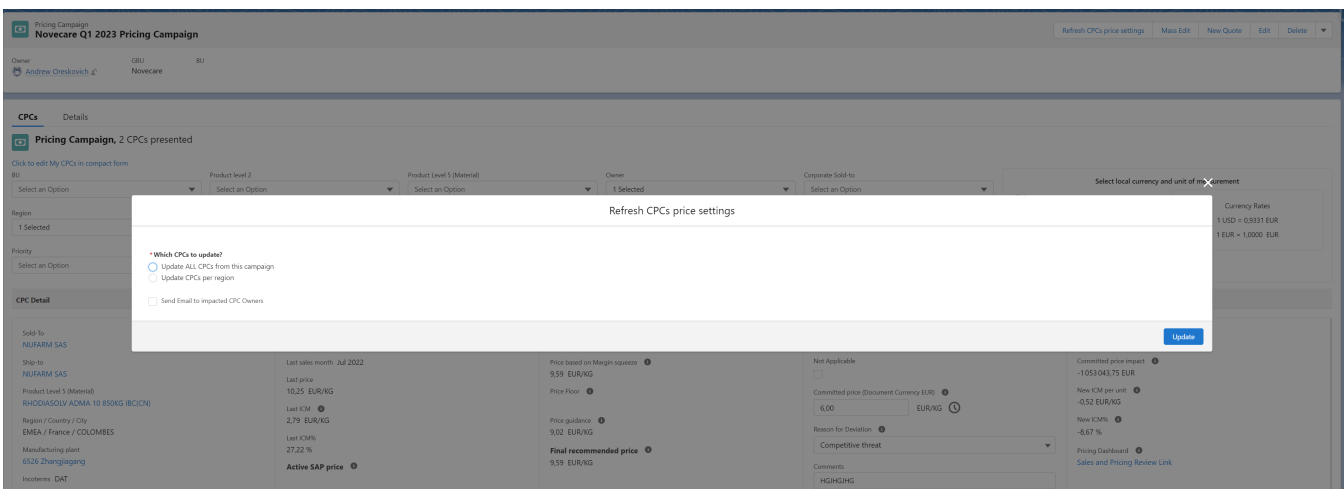
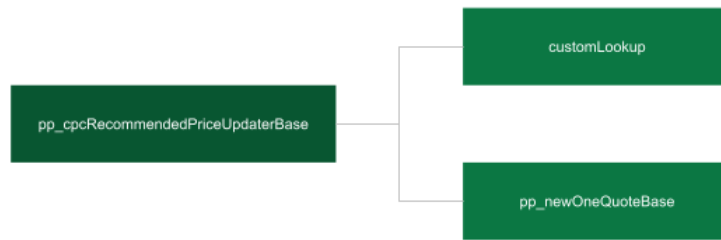
BU: Select an Option | Product Level 2: Select an Option | Product Level 3 (Material): Select an Option | Owner: 1 Selected | Corporate Sell-to: Select an Option
 Region: 1 Selected | Sold To: Select an Option | Ship-to: Select an Option | CPC Status: Select an Option | Quote: Select an Option
 Priority: Select an Option

Select local currency and unit of measurement

UoM: KG | Currency Rates: 1 USD = 0.9331 EUR
 Currency: EUR | 1 EUR = 1.0000 EUR

CPC Detail	Last Sales Information	Price Recommendations	Account Manager Review	Impact
Sold To: NUFARM SAS Ship-to: NUFARM SAS Product Level 3 (Material): RHODIASOLV ADMA 10 850KG IBC1CN Region / Country / City: EMEA / France / COLOMBES Manufacturing plant: KES2 Zhongguang Incoterms: DAT CPC Reference: CPC-00054769 Owner: Anton Solomin	Last 12M Volume: 991100 KG Last sales month: Jul 2022 Last price: 10,25 EUR/KG Last ICM: 2,79 EUR/KG Last ICM%: 27,22 % Active SAP price	Estimated next 3M volume: 247775 KG Price based on Margin sequence: 9,59 EUR/KG Price Floor: 9,02 EUR/KG Price guidance: 9,02 EUR/KG Final recommended price : 9,59 EUR/KG	Account Manager CPC review: Below Recommendation Not Applicable Committed price (Document Currency EUR): 6,00 EUR/KG Reason for Deviation: Competitive threat Comments: HGHG+HG RMD Comments:	Price increase % vs. last invoiced price: -41,46 % Committed price impact: -1053043,75 EUR New ICM per unit: -0,52 EUR/KG New ICM%: -8,67 % Pricing Dashboard: Sales and Pricing Review Link
Sold To: NUFARM SAS Ship-to:	Last 12M Volume: 991100 KG Last sales month: Jul 2022	Estimated next 3M volume: 247775 KG Price based on Margin sequence:	Account Manager CPC review: Below Recommendation Not Applicable	Price increase % vs. last invoiced price: -41,46 % Committed price impact:

Update With Recommended Price button flow LWC structure



• Custom Permissions

Custom Permission	Description
PP_canRefreshCPCCustomSettings	Enables the user to refresh CPC price settings.
PP_canEditCampaignEndDate	Enables the user to edit campaign end date.
PP_abilityToMassCreateRMPs	Enables the user to see the button to mass create RMPs & volume brackets

- **Static Resources**

Custom Permission	Description
PP_WideModalCss	CSS to display OQLIs table

- **Screen Flows**

API Name	Label	Where is it used	Description
PP_WideModalCss			CSS to display OQLIs table

Annex