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.

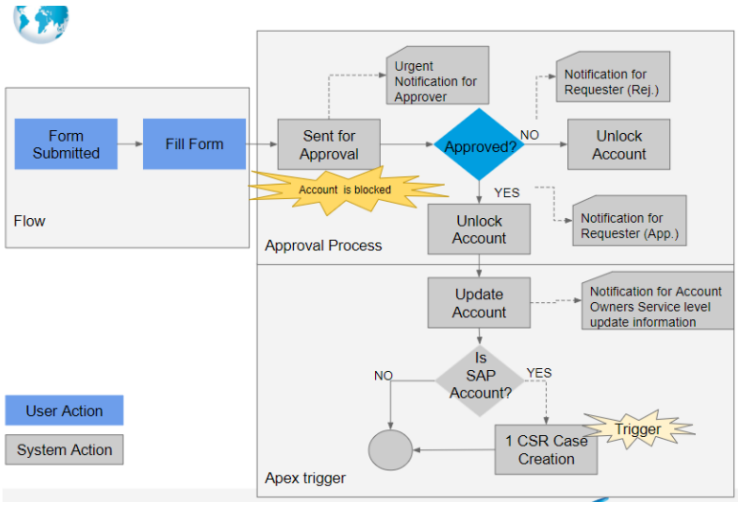
Pricing Campaign Technical Documentation

• 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.doCheckIfProductIsAllowedOnQuote		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.

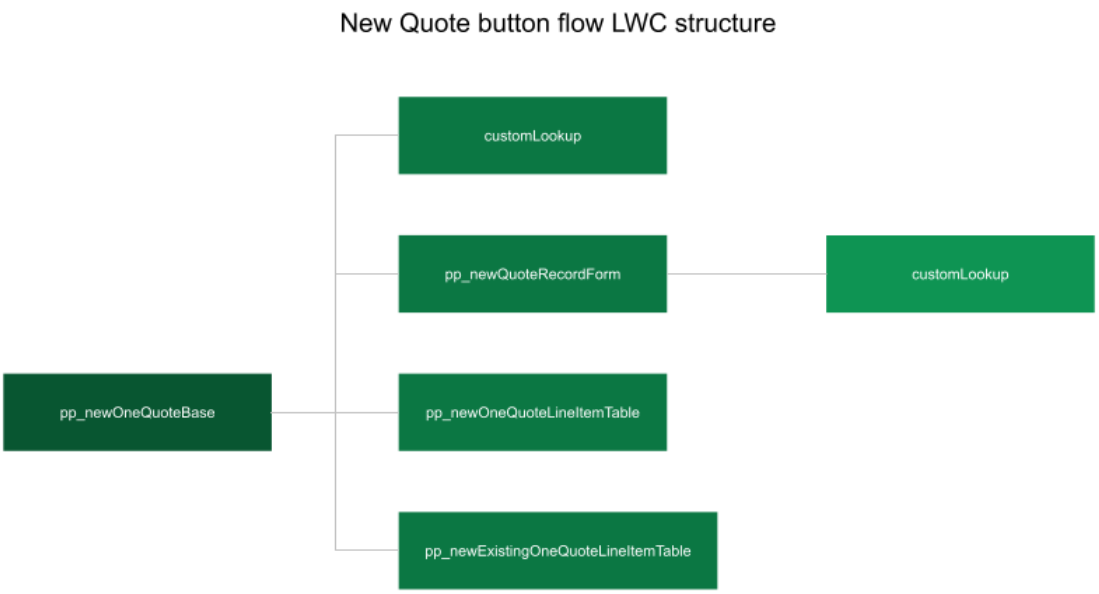
	PP_Pricing_Campaign_CPC_Helper.doSetAccountManagerReview		Set account manager review field.
	PP_Pricing_Campaign_CPC_Helper.doSetShipToRegion		Find and set ship-to region.
	PP_Pricing_Campaign_CPC_Helper.doCheckUtilities		Is the current user doesn't have bypass validation rules flag - validate utility 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.doCheckIfProductIsAllowedOnQuote		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.

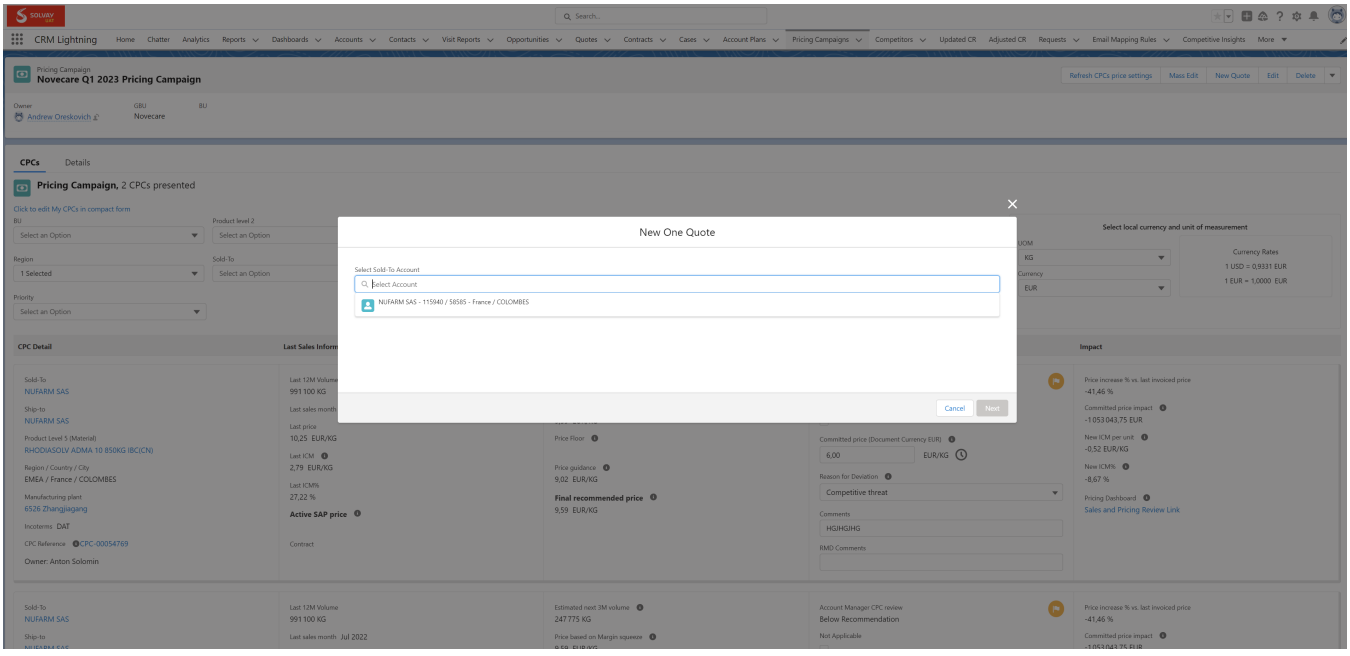
- **Lightning Components**

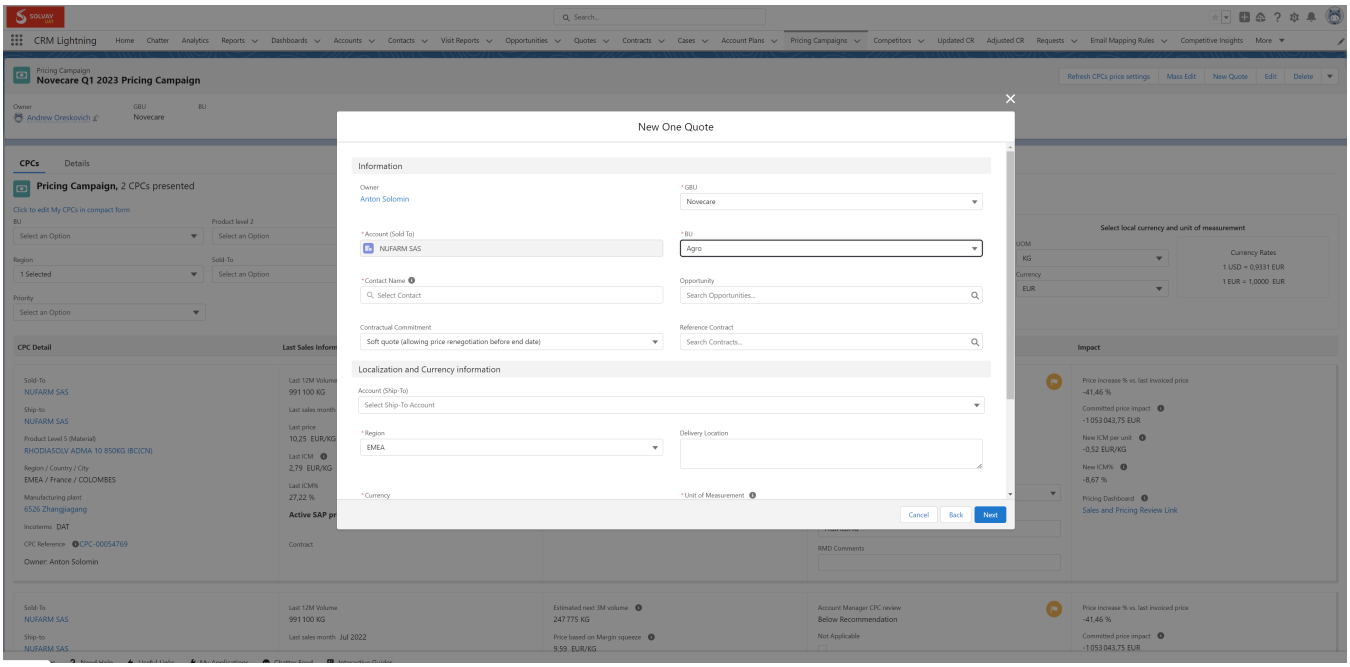
There's a number of LWC components that were created sometimes to extend the standard functionality and sometimes to accommodate completely custom logic not possible in standard. Here's an overview of LWC that are used in the Campaigns module:

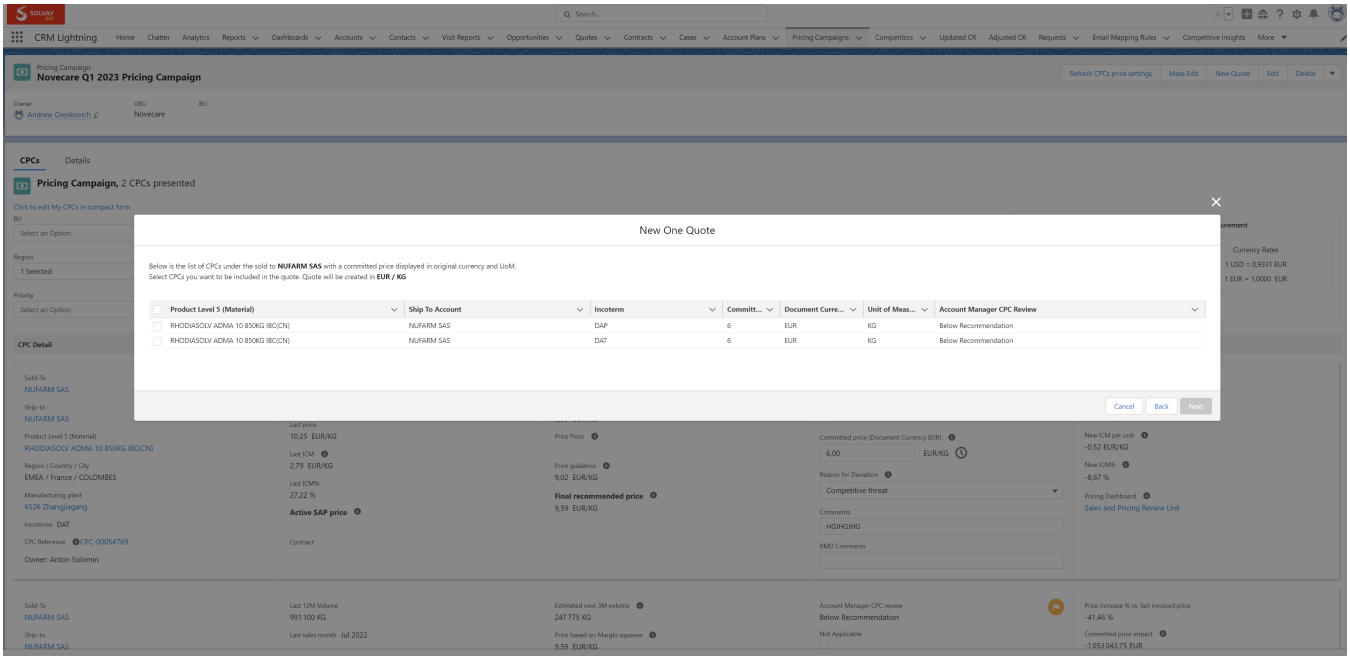
LWC Name	Nested	Nested	Description	Why not standard (description for not standard at the time of implementation)
customLookup			A custom lookup component that is used to let the user select a lookup field based on a given logic. Used in several places in the application.	There's a standard lookup component, 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_pricingCampaignReportRedirection		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 OQLIs.	No standard component available.
pp_cpcRecommendedPriceUpdaterBase			Update multiple CPCs with recommended price	No standard component available.

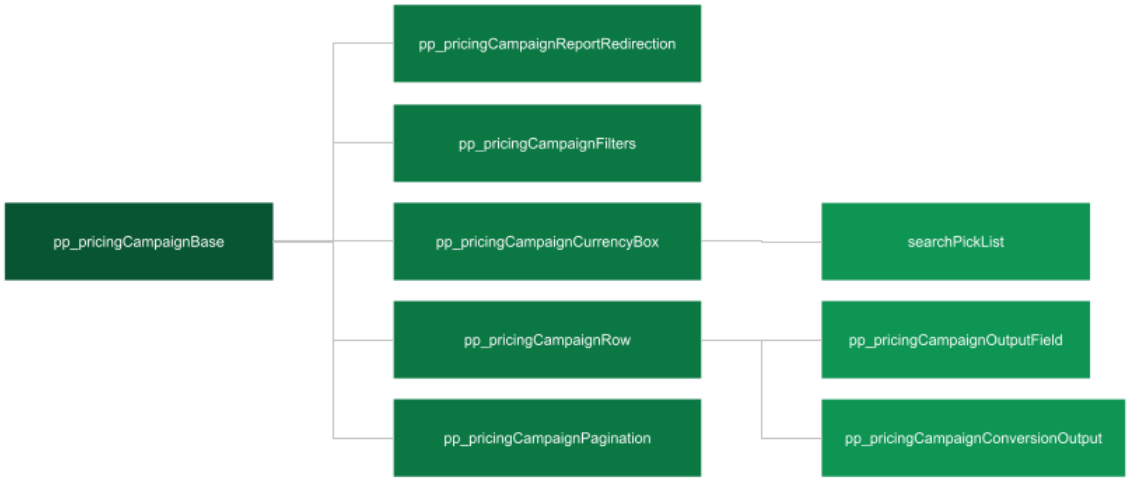


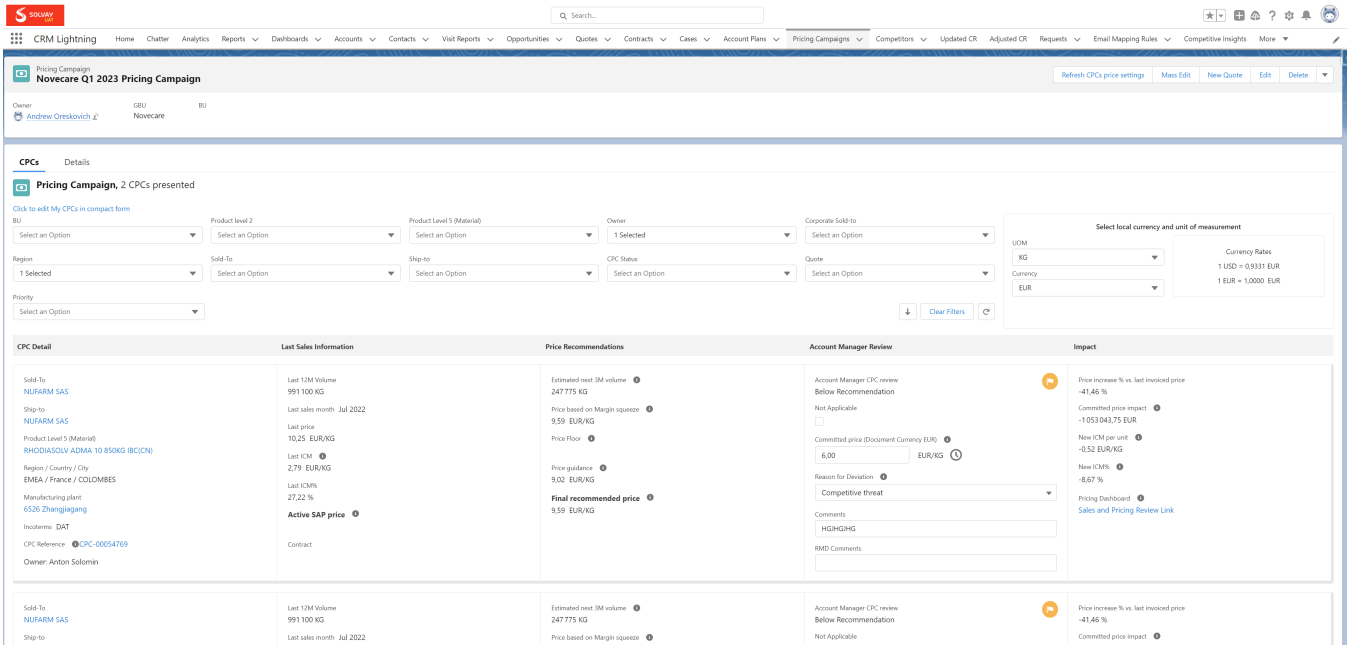



New One Quote
Information
Owner
Anton Solomin
*GBU
Novecare
*Account (Sold To)
NUFARM SAS
*BU
Agro
*Contact Name
Select Contact
Opportunity
Search Opportunities...
Contractual Commitment
Soft quote (allowing price renegotiation before end date)
Reference Contract
Search Contracts...
Localization and Currency information
Account (Ship-To)
Select Ship-To Account
*Region
EMEA
Delivery Location
*Currency
*Unit of Measurement
Cancel
Back
Next

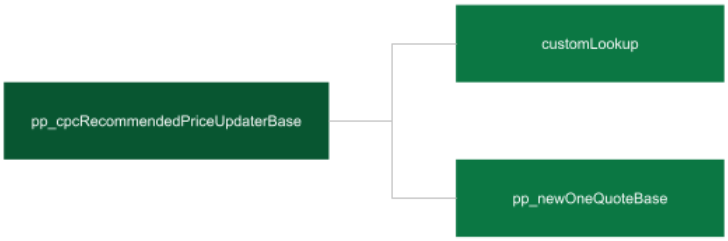

New One Quote
Below is the list of CPCs under the sold to NUFARM SAS with a committed price displayed in original currency and UoM.
Select CPCs you want to be included in the quote. Quote will be created in EUR / KG
Product Level 5 (Material)
Ship To Account
Incoterm
Committ...
Document Curre...
Unit of Meas...
Account Manager CPC Review
RHODIASOLV ADMA 10 850KG IBC(CN)
NUFARM SAS
DAP
6
EUR
KG
Below Recommendation
RHODIASOLV ADMA 10 850KG IBC(CN)
NUFARM SAS
DAT
6
EUR
KG
Below Recommendation
Cancel
Back
Next

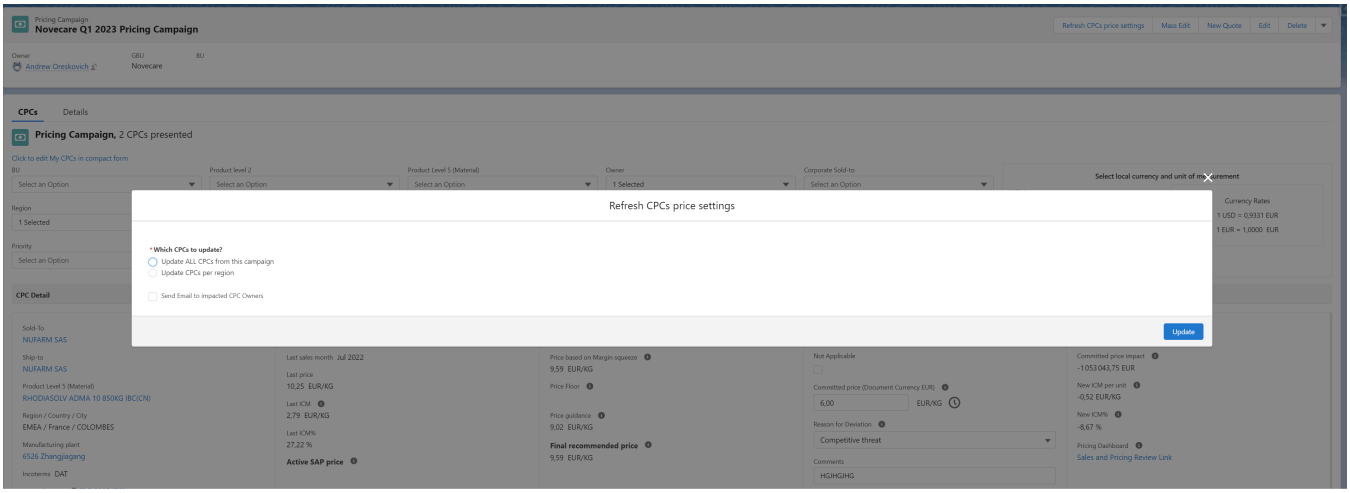
Pricing campaign table LWC structure





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