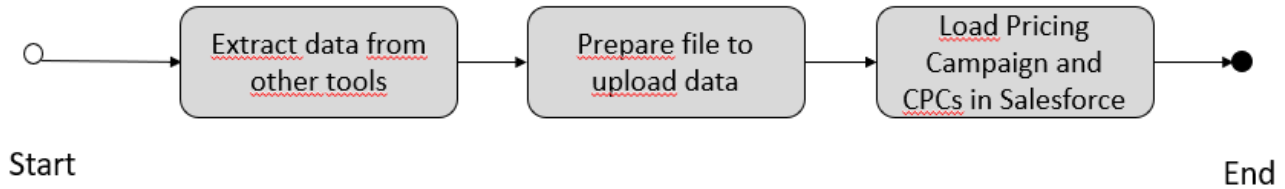
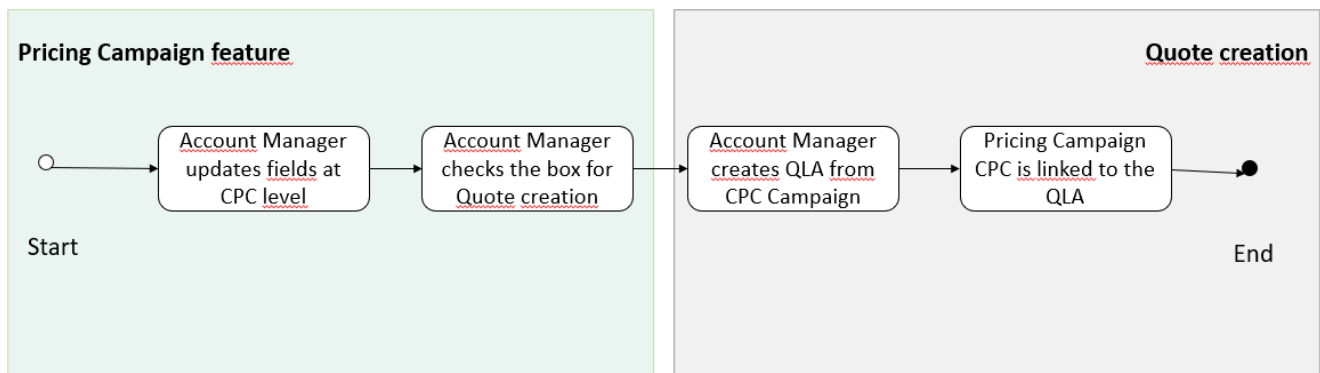


FD - [iCARE] Pricing Campaign

1/ Pricing Campaign processes

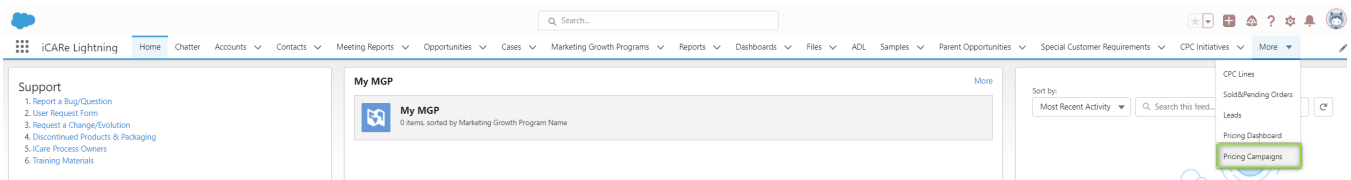


- Data extracted from other tools can be found in GoogleSheet:
- Template to fill in to upload data in Salesforce :
- Only Data Steward and Pricing Manager profile will upload Pricing Campaign and CPC into Salesforce. Uploading process below:

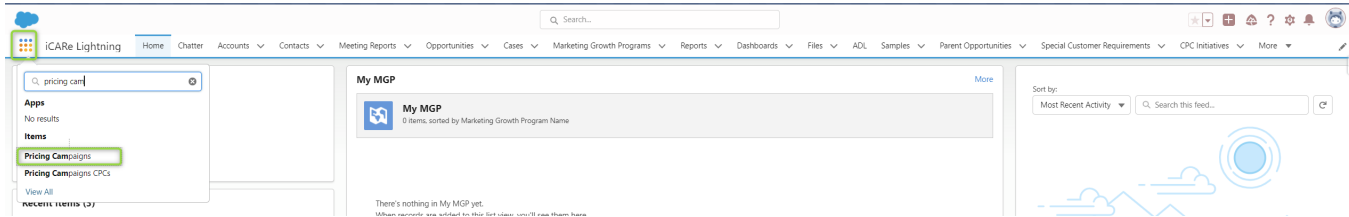


2/ User Access to Pricing Campaign feature

User, with the correct profile and permissions, can access to the Pricing Campaign feature through the top menu:



Otherwise, they can also access to the Pricing Campaigns through the App Launcher:



3/ Lightning Web Component - Pricing campaign

A. Table 'Pricing Campaign CPC'

Pricing campaign CPC records are displayed in the LWC below.

Pricing campaign CPC	Account (Sold-To)	Product	Pricing Region	Pricing Currency	UOM	Quote History	Annual volume	Forecasted Annual Volume	Weighted average price	Last Price	Recommended Price - Pricing Currency	Forecasted impacts	Rationale	Account Manager Review	Committed price	Res
Pricing CPC -00007522	POEPELMANN KUNSTSTOFF-TECHNIK	PRA A-1145 H5 NT	Europe	EUR - Euro	Kg	Link	150.00	150.00	6.10	6.10	7.93	1.83	Click to view price reco rationale	Not yet Reviewed	7.93	S
Pricing CPC -00007521	MERCK SCHUCHARDT OHG	VDC P200	Europe	EUR - Euro	To	Link	19,200.00	18.65	6,350.00	6,350.00	6,350.00	3,650.00	Click to view price reco rationale	Committed	10,200.00	S
Pricing CPC -00007520	UNITED INITIATORS GMBH	PVDC A050	Europe	EUR - Euro	To	Link	135,000.00	173.88	4,699.70	2,725.83	3,134.67	408.84	Click to view price reco rationale	Not yet Reviewed	3,134.67	S
Pricing CPC -00007532	CHRISTIAN BOURRASSE SA	PVDC A050	Europe	EUR - Euro	To	Link	502.00	0.50	10,051.70	5,829.99	6,704.51	844.01	Click to view price reco rationale	Committed	6,674.00	S
Pricing CPC -00007547	ROEHLING SUSTAPLAST KG	PK KT-820 NT	Europe	EUR - Euro	Kg	Link	33,000.00	33,000.00	45.15	45.15	53.84	-0.15	Click to view price reco rationale	Not yet Reviewed	45.00	S

First part of this WBL : filters

The main goal of these filters on this LWC for users were to be as useful and helpful as possible.

User must easily find CPCs with key information. Due to this requirement, we implemented logic explained below:

- Once a first filter is applied, the remaining filters only display the values of the remaining records still being displayed in the LWC instead of all the CPC records initially loaded in the table.
- Users can select multiple items per dropdown filter (e.g. multiple Sold-To Account Names), and consequently the table present the records matching the 2 (or more) items selected.
- Button 'Clear Filter' clears all values selected for all filters

Second part of this WBL : CPCs

1/ Frozen Column

Two columns have been frozen for helping the user during the navigation of this table from left to right:

- Account (Sold-to)
- Product

2/ Quote History Link

Quote history link redirect the user to a Salesforce report 'Account and Product Price History'

CPC(s)								
Pricing Campaign input								
Pricing campaign CPC	Account (Sold-To)	Product	Pricing Region	Pricing Currency	UOM	Quote History	Annual volume	For An Vo
Pricing CPC -00007522	POEPELMANN KUNSTSTOFF-TECHNIK	PPA A-1145 HS NT	Europe	EUR - Euro	Kg	Link	150,00	15
Pricing CPC -00007521	MERCK SCHUCHARDT OHG	VDC P200	Europe	EUR - Euro	To	Link	19 200,00	18
Pricing CPC -00007520	UNITED INITIATORS GMBH	PVDC A050	Europe	EUR - Euro	To	Link	135 000,00	17
Pricing CPC -00007532	CHRISTIAN BOURRASSE SA	PVDC A050	Europe	EUR - Euro	To	Link	502,00	0,5

 iCARE Lightning

[Home](#) [Chatter](#) [Accounts](#) [C](#)

 Report: Opp + Opp Line Item + Opp Bracket

Account and Product Price History

3/ Rationale link

Rationale link redirects the user to a google sheet:

CPC(s)

Pricing Campaign input								Account Manager input			
Account (Sold-To)	Product	recasted inual lume	Weighted average price	Last Price	Recommended Price - Pricing Currency	Forecasted impacts ↑	Rationale	Account Manager Review	Committed price	Reason for rejection	Rejection description
SK INNOVATION	PVDF 5140/1001	51,00	35 654,00	35 654,00	41 002,10	-35 618,00	Click to view price reco rationale	Committed	36,00	Select an Option	
YINFU MATERIAL TECH CO LTD	FOMBLIN ZMF-402	00	178 762,23	178 762,23	178 762,23	-23 182,23	Click to view price reco rationale	Rejected	155 580,00	Competitive threat	Customer are impacted by M30 cracking grade. And
J.K. FENNER (INDIA) LIMITED	TECNOFLOX FOR TF838K	00	3 000,00	3 000,00	3 000,00	-3 000,00	Click to view price reco rationale	Not yet Reviewed	0,00	Select an Option	
PROMED MOLDED PRODUCTS	EVIVA EV-500	00	1 940,58	1 940,58	1 940,58	-1 929,58	Click to view price reco rationale	Rejected	11,00	Price fixed by contract	

- Third part: Pricing Campaign information

At the bottom of this LWC, Pricing campaign layout is available with Pricing Campaign key information:

Campaign Info	
Campaign Name	Campaign Scope
SpP Price Increase Campaign 2022	SpP Price Increase Campaign 2022
Campaign Description	Owner
SpP Price Increase Campaign 2022	SFS Admin User
Timeline	
Campaign Start Date	Campaign End Date
1/1/2022	6/30/2022
Quote Valid From (Internal Only)	Offer Expiration Date (External)
12/1/2021	6/30/2022
Quote Valid To (Internal Only)	
6/30/2022	
Price recommendations data	
Source	Total # CPCs in campaign
File Upload	5,675
Campaign projected sales impact	
293,053,756	
System information	
Created By	Date of data upload
Pedro Infante, 10/27/2021 11:58 AM	12/16/2021
Last Modified By	SF Campaign ID
Andre Savio, 3/14/2022 1:27 PM	a17V000004ZQIN

B. Table 'Related'

- Pricing Campaign CPC
- Pricing Campaign History

Pricing Campaign CPC										
Related										
Pricing Campaigns CPC (10+)										
Pricing Campaign CPC Name	Account Manager Review	Sold-To	Sold-To Code	Product	Pricing Regi...	Pricing Currency	Annual volume	Committed price		
1 Pricing CPC -00007518	Historical Data	MAPA GMBH	0001011544	PPSU D-3000 NT MF	Europe	EUR - Euro	4,975.00	21.95		
2 Pricing CPC -00007519	Historical Data	OQEMA GMBH	0001011698	PM AI-10 LS	Europe	EUR - Euro	280.00	102.17		
3 Pricing CPC -00007520	Not yet Reviewed	UNITED INITIATORS GMBH	0001011821	PVDC A050	Europe	EUR - Euro	135,000.00	3,134.67		
4 Pricing CPC -00007521	Committed	MERCK SCHUCHARDT OHG	0001012125	VDC P200	Europe	EUR - Euro	19,200.00	10,200.00		
5 Pricing CPC -00007522	Not yet Reviewed	POERELMANN KUNSTSTOFF-TECHNIK	0001014303	PWA A-1145 HS NT	Europe	EUR - Euro	150.00	7.93		
6 Pricing CPC -00007523	Committed	CONTINENTAL REIFEN DEUTSCHLAND GMBH	0001014339	TECNORFON P 757	Europe	EUR - Euro	32,000.00	29.95		
7 Pricing CPC -00007524	Committed	CONTINENTAL REIFEN DEUTSCHLAND GMBH	0001014339	TECNORFON P 457	Europe	EUR - Euro	450.00	29.95		
8 Pricing CPC -00007525	Committed	CONTINENTAL REIFEN DEUTSCHLAND GMBH	0001014339	TECNORFON T 636	Europe	EUR - Euro	8,750.00	27.93		
9 Pricing CPC -00007526	Committed	CONTINENTAL REIFEN DEUTSCHLAND GMBH	0001014339	TECNORFON T 549L	Europe	EUR - Euro	38,625.00	29.95		
10 Pricing CPC -00007527	Historical Data	GEHR KUNSTSTOFFWERK	0001014599	PPSU R-5500 BK37	Europe	EUR - Euro	1,000.00	34.06		
View All										
Pricing Campaign History (2)										
Date	Field	User	Original Value	New Value						
1 1/11/2022 10:31 AM	Offer Expiration Date (External)	Charlene Belleuf		2022-06-30						
2 10/27/2021 11:58 AM	Created	Pedro Infante								
View All										

E. Filtering and field dependencies

- 'x' function to clear individual filters

There is the cross option on each filter. When the AM clicks on the cross, the system will clean all the values previously selected for that filter.

Pricing Campaign CPC							Related
Pricing Campaign CPC							
Sold To (Account Name)	Pricing Currency	Owner (Account Manager)	Pricing Region	Product H4	Product Name	CPC Status	
2 values sele		1 values sele		1 values sele		1 values sele	Clear Filters

- Filter dependency function

When the AM is opening one filter to select some values, the system must filter on the other filter in the back-end, so when the AM is opening another filter, he is not seeing the values that do not match the first filter(s).

Since the values that didn't apply are hidden, the list of options is reduced.

After the AM selects the values in a filter, when he opens that filter again, the system should

- display the values selected on the top of the filter list, ordered alphabetically
- the remaining values from the list, if they exist, should come after, ordered alphabetically

The screenshot shows a web interface for 'Pricing Campaign CPC'. At the top, there are tabs for 'Pricing Campaign CPC' (active) and 'Related'. Below the tabs, there are several filter fields: 'Sold To (Account Name)', 'Pricing Currency', 'Owner (Account Manager)', 'Pricing Region', 'Product H4', 'Product Name', and 'CPC Status'. Each field has a search icon and a placeholder text '0 values seler'. The 'Product H4' field is currently selected, showing a dropdown list with three items: 'Hyflon PFA', 'Ketaspire', and 'SOLEF Suspension'. To the right of the filters is a 'Clear Filters' button. Below the filters, there is a section labeled 'CPC(s)' with a table that is currently empty.

4/ Quote creation from Pricing campaign CPCs

A. Rejected CPCs

If Account Manager Review ISCHANGED to **Rejected** - is not auto-saved, but instead:

1. Message pop's up: *"To Reject this CPC, please provide a Reason for Rejection."*
2. If the User then changes Reason for Rejection from null to not null:
 - a. auto-save and commit both values to database (Account Manager Review = Rejected and Reason for Rejection with whatever value the User chose).
3. if the User does not change Reason for Rejection from null to not null and instead refreshes the page:
 - a. do not save any changes made by the User - returning Account Manager Review to the value it had before it was changed to **Rejected**.
1. Alternatively, if the User just changes the Reason for Rejection from null to not null and the Account Manager Review != Rejected, present User with a validation Error:
 - a. "Please choose Rejected on Account Manager Review field before providing a Reason for Rejection".
 - b. Do not auto-save Reason for Rejection until User chooses Account Manager Review = Rejected.
2. Note: If User changes Account Manager Review value from **Rejected** to **Not Yet Reviewed** or **Committed** - the system needs to automatically make Reason for Rejection and Rejection Description = null

B/ CPCs automatically rejected by the system

1. The Account Manager can inputs the Committed Price when the Account Manager Review is Committed . When the Committed Price entered by the Account Manager is equals or less than the last price, the system should automatically Reject the CPC.

When the Recommended Price is equal or lower than the last price, the system should keep the Account Manager Review as Committed.

- a. When the Account Manager is updating the Account Manager Review to Committed or when the CPC Account Manager Review is Committed and the AM is updating the Committed Price, the system will evaluate
 - if the Committed price is equal or lower than the Last Price, evaluate the following:
 - if Last Price is greater than the Recommended Price - the system should do nothing
 - Committed Price <= Last Price && Last Price >= Recommended Price
 - Committed Price > Last Price
 - if Last Price is less or equal than the Recommended Price - the system should reject the CPC
 - Committed Price <= Last Price && Last Price < Recommended Price

The comparision of the values should be done after the system round up the values.

If the condition above is met, the system will automatically fill-in:

- The 'Account Manager Review' field in the CPC with Rejected value
- The 'Reason for Rejection' field with 'Other (Please describe)'
- The 'Reason for Rejection' field with 'Committed Price equal or lower than Last Price'

C/ Committed CPCs

User is able to create a quote only if at the CPC level:

- Account Manager review = Committed
- CPC Status = Committed
- Checkbox = TRUE

Pricing Campaign
SpP Price Increase Campaign 2022

Pricing Campaign CPC Related

Pricing Campaign CPC

Sold To (Account Name) Pricing Currency Owner (Account Manager) Pricing Region Product H4 Product Name CPC Status

Select an option... Select an option... Select an option... Select an option... Select an option... Select an option... Select an option... Clear Filters Create Quote

CPC(s)

Pricing Campaign Input							Account Manager Input				
Account (Sold-To)	Product	Weighted average price	Last Price	Recommended Price - Pricing Currency	Forecasted Impacts	Rationale	Account Manager Review	Committed price	Reason for rejection	Rejection description	CPC Status
POEPPELMANN KUNSTSTOFF-TECHNIK	PPA A-1145 HS NT	6.10	6.10	7.93	1.83	Click to view price reco rationale	Not yet Reviewed	7.93	Select an Option		Not yet Reviewed
MERCK SCHUCHARDT OHG	VDC P200	6,350.00	6,350.00	6,350.00	3,850.00	Click to view price reco rationale	Committed	10,200.00	Select an Option		Committed

■ No pricing setting matching

one

- Pricing_Setting__r.Product_Pricing__r.Product__r.Product_Availability__c != Inactive
 - AND
- Pricing_Setting__r.Product_Pricing__r.Valid_Active__c EQUALS TRUE
 - AND
- Pricing_Setting__r.Region__c EQUALS Pricing_Campaign_CPC__r.Pricing_Region__c
 - AND
- Pricing_Setting__r.CurrencyIsoCode EQUALS Pricing_Campaign_CPC__r.Pricing_Currency__c (only need to compare the first 3 characters of the Pricing Currency field of Pricing Campaign CPC)

Screen below is displayed to the user to explain the reason why a quote cannot be created:

Pricing Campaign CPC Related

Pricing Campaign CPC

Sold To (Account Name)

Select an option...

CPC(s)

Warning

The Selected Committed CPCs:

Pricing CPC -00013511

do not have an Active Pricing Setting.
Please deselect the CPC(s) in the table if you wish to proceed to Quote creation.
Alternatively, please contact the corresponding Product Manager of the Product(s) affected in order to request the creation of a valid Pricing Setting.

OK

■ One pricing setting is matching

After clicking the button 'Create Quote' and only if there is a Pricing setting matching, a screen dedicated to create a quote appears:

New Opportunity: Sales Quote

QUOTE INFORMATION

* Opportunity Owner

Charlene Belleuf

Account Name ⓘ

ROECHLING SUSTAPLAST SE & CO. KG

* Opportunity Name ⓘ

SpP Price Increase Campaign 2022

* Contact Name ⓘ

Search Contacts...

Description

Final Consignee

Search Accounts...

* Visibility

Region Restricted

* Stage ⓘ

Draft

Quotation Date

16 Mar 2022

* Contractual Commitment

--None--

Reference Contract

Search Contracts...

Stage Description Details

Salesforce Sans ▾ 12 ▾ **B** *I* U

Renewed From

Search Opportunities...

QUOTE DATES & TIMELINE

Quote Valid From (Internal Only) ⓘ

1 Dec 2021

Offer Expiration Date (External) ⓘ

30 Jun 2022

Quote Valid To (Internal Only) ⓘ

30 Jun 2022

REGION & CURRENCY INFORMATION

Region

Europe

Opportunity Currency

EUR - Euro

SYSTEM INFORMATION

* Close Date ⓘ

15 Apr 2022

Probability (%) ⓘ

Logic has been implemented for the fields below in order to make the quote creation the easiest possible for the user:

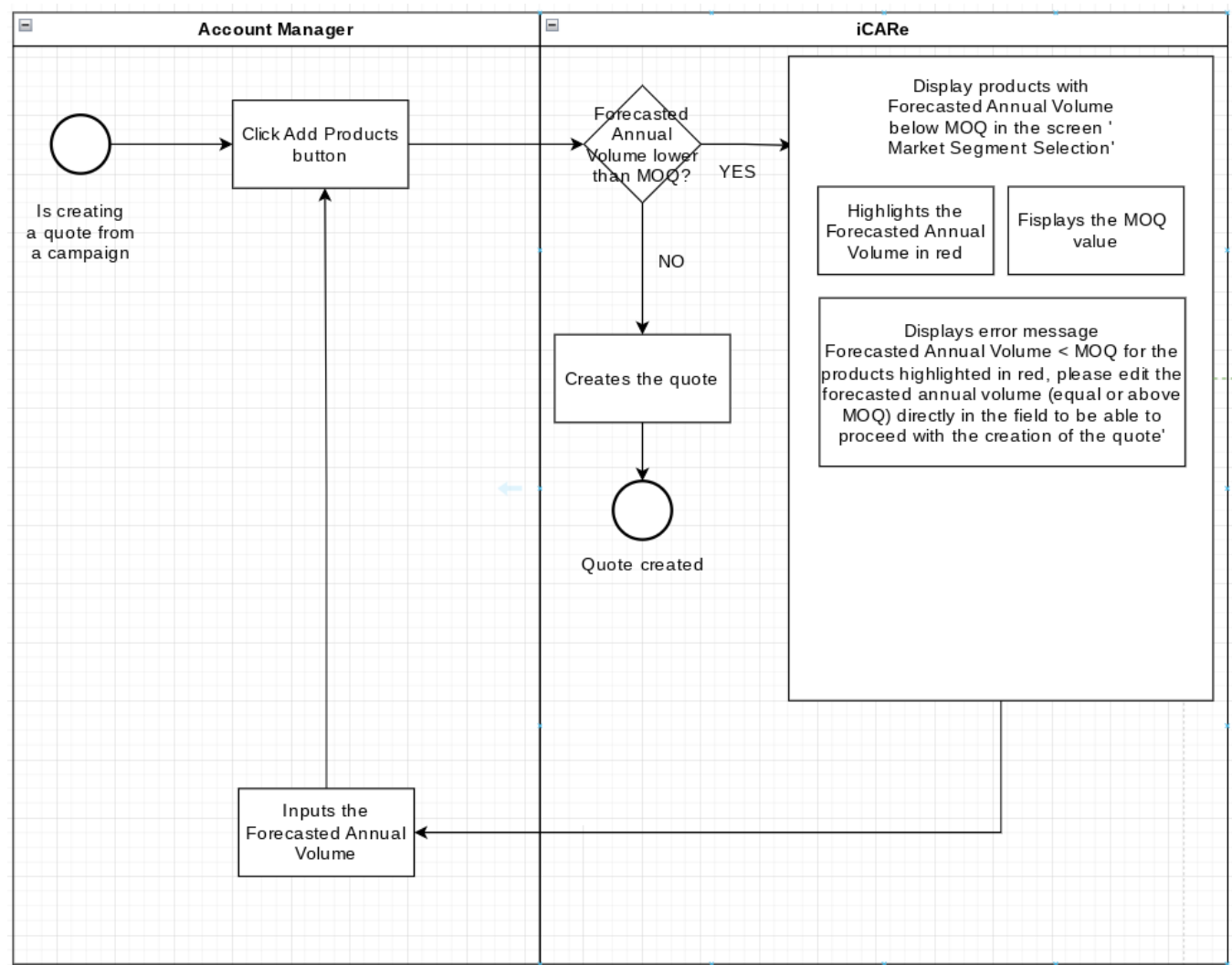
- Contact: user can paste the name of the Account name = contacts related to this account will be display in the dropdown
- Stage = Draft by default
- Quotation date = Today
- Quote valid From (internal only) = Quote valid From (internal only) FROM the Pricing Campaign record
- Quote valid to (internal only) = Quote valid to (internal only) FROM the Pricing Campaign record
- Offer expiration date = Offer expiration date FROM the Pricing Campaign record
- Region = Pricing region FROM the CPC record
- Currency = Pricing currency FROM the CPC record
- Close date = 30 days after the creation date so 'Today + 30 days'

5/ Forecasted Annual Volume field editable

SpP wants to transfer the accountability on the figures to Account Managers, so they should be able to edit the forecasted annual volume. The system by default an populate the Forecasted Annual Volume with the MoQ if the Forecasted Annual Volume is below MOQ. The Forecasted Annual Volume can be changed or updated by the account manager if needed (with a value higher than the MOQ).

The Forecasted Annual Volume should be updated in the CPC and in the OLI, to keep consistency.

Flow Diagram - <https://app.diagrams.net/#G1KW2yeZrTajQ4qgYA2lwDof8ta-IgfbIm>



Adjustment the Forecasted Annual Volume in the Market Segment Selection screen

Market Segment Selection

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market	Forecasted Annual Volume	MOQ
HALAR 901	North America	USD	AUTOMOTIVE (AUTO)	AUTO - AIR AND EX...	BLANK	2500	3000

Forecasted Volume < MOQ, please edit the forecasted annual volume to be able to proceed with the creation of the quote

Add Products
Cancel

When the AM clicks on Add Product button, the system will confirm if the Forecasted Annual Volume in the CPC is below the MOQ from the corresponding Pricing Setting.

if the Forecasted Annual Volume in the CPC is below the MOQ in the Pricing Setting, the system will display:

- in edit mode the 'Forecasted Annual Volume' field
- in read only the MOQ field according to the selected Pricing Market
- the products impacted with Forecasted Annual Volume highlighted in red

- an error message at the bottom of the screen, to advise the account manager to edit the Forecasted Annual Volume for the products highlighted in red:
Forecasted Annual Volume < MOQ for the products highlighted in red, please edit the forecasted annual volume (equal or above MOQ) directly in the field to be able to proceed with the creation of the quote'

The AM should change the Forecasted Annual Volume to a value equal or greater than the MOQ shown in the screen and then press the 'Add Products' button.

The system will validate again the Forecasted Annual Volume and will allow the AM to save the quote with the selected products. The system will update the Forecasted Annual Volume field in the CPCs linked to the OLIs that were updated before.

For the products with Forecasted Annual Volume above MOQ, they will appear in the quote with the original Forecasted Annual Volume value from campaign.

Remarks:

1 - if the AM also updates the Pricing Market along with the MOQ, when he clicks on Add Products, the system will validate the Forecasted Annual Volume against the MOQ again.

Different Pricing Markets can have different MOQ thresholds and the MOQ value provided by the AM could end-up again in error-

The system will run the rules described in the previous slide and, in case of non compliance, the same behavior will be applied.

2 - If the quote is not created from the pricing campaign, if it's a quote renewal or a quote created from scratch, the Forecasted Annual Volume and MOQ fields are grey out

- MOQ is already grey out
- Forecasted Annual Volume is empty and grey out when the OLI is not created from a CPC

6/ Market Segment, End Use and Market Cluster automatically calculated and assigned for CPCs

1)

When the CPC is created and every time the Account or the Product or the End Use are updated to a different Account/Product in the CPC,, the system will:

- Get the Account and the Product in the CPC and search for them in the End Use (end_use_c rules) table
 - If there is one match, populate the end use and market segment in the CPC
 - Otherwise, leave them blank (if business needs to update the end use or market segment on the CPC, the update must be done at end use rules by updating the rule or creating a new rule. The account manager needs to request the GBU Data Steward to manage the end use rule).

2)

When there is a new end use rule created or updated (end_use_c rules), take all the CPCs from all campaigns with the Account and Product present in the rule and update the End Use and Market segment in the CPC.

3)

When the End Use is updated by the system, the system will: calculate the market cluster, reusing the existing logic:

- If Account Team Cluster equals to null/Empty then Market Cluster = "Not Identified" If not, the system goes to the next rule.
- If Account Team Cluster equals to "Channel Partners & Digital Sales" then Market Cluster = "Channel Partners & Digital Sales". If not, the system goes to the next rule.
- If End Use equals to null/Empty then Market Cluster = "Not Identified". If not, the system goes to the next rule.
- If End Use not equals to null/Empty then we use the end use mapping to get the Market Cluster for each specific End Use (using End_Use_Mapping_mdt.). If not, the system goes to the next rule.
- If End Use equals to null/Empty then Market Cluster = "Not Identified"

If the code reaches the last rule, create an app log twith the end use value o alert admins that an end use is missing from the metadata.

4)

When the Account Manager is creating the quote from CPC in the Market Segment Selection' screen (in the screenshot below), the system should

- display the end use and market segment fields as read-only and pricing market as editable.
- when the end use or market segment are empty,, all the fields end use, market segment and pricing market must be editable (but the values selected by the account manager will not be copied from the OLI into the CPC)

Market Segment Selection

Product	Pricing Region	Currency	Market Segment	End Use	Pricing Market
FOMBLIN Y 06	North America	USD	AUTOMOTIVE (AUTO) ▼	AUTO - CHASSIS ▼	BLANK ▼
FOMBLIN DA 306/VAC	North America	USD	AUTOMOTIVE (AUTO) ▼	AUTO - BEARINGS ▼	BLANK ▼
FOMBLIN YR	North America	USD	CHANNEL PARTNERS (C... ▼	CH - AUTO COMPOUN... ▼	CHANNEL PARTNERS (C... ▼

7/ Permissions & Sharing

A. Pricing Campaign object

Profile Object Permissions - only the Profiles meeting the following criteria should be able to **Read** Pricing Campaigns:

1. Profile.User License = Salesforce
 2. Profile.Custom = TRUE
- System Administrator, System Admin (Lite) and GBU Data Steward must have **full permissions** for this object (Read, Create, Edit, Delete, View All and Modify All).
 - All other Profiles meeting criteria 1 and 2 above should not have anything other than Read permission for this object (no Create, no Edit, no Delete, no View All, no Modify All).

B. Pricing campaign CPC Permissions & Sharing

Only Owner can see Pricing Campaign CPC records (Private object).

- Grant Access Using Hierarchies = TRUE
 - no other Sharing Rules will be implemented

Profile Object Permissions - only the Profiles meeting the following criteria should be able to **Read and Edit** Pricing Campaigns:

1. Profile.User License = Salesforce
 2. Profile.Custom = TRUE
- System Administrator and GBU Data Steward must have **full permissions** for this object (Read, Create, Edit, Delete, View All and Modify All).
 - System Admin (Lite) Profile will have access to this object via the z__Object_Permissions_for_AdminLite Permission Set
 - adjust this permission set to grant Access to Pricing Campaign CPC (Read, Create, Edit, Delete, View All and Modify All).
 - All other Profiles meeting criteria 1 and 2 above should only have **Read and Edit** permission for this object (no Create, no Delete, no View All, no Modify All)

8/ Link Committed CPCs belong to an Active Campaign with a quote created outside of a Pricing Campaign

The data steward wants to monitor and identify which OLIs were created outside of the campaign, that can match with any CPC inside an active campaign, so he can link the OLI with the matching CPC.

It was created an automation in the system to identify and link Committed CPCs with matching quote line items (OLI), if the AM or KAM is not creating the quote from the Active Pricing Campaign.

To identify OLIs created outside of an active campaign and populate the CPCs with a matching OLI, the system should check for the following criteria:

1 - CPCs included within an active campaign (Quote Valid From (Internal Only) less or equal than today and Quote Valid To (Internal Only) greater or equal than today)

2 - With the status equals to Committed

3 - with the same Account, Product, Region and Currency

4 - with the same Account, Product, Region

The logic is **1 AND 2 AND 3**

if no matches found in the logic above, run the logic **1 AND 2 AND 4**

If a match is found between OLI and CPC, the field Pricing_Campaign_CPC__c in the Opportunity Line Item is updated with matching CPC ID.

The field Generated Opportunity Line Item in the OLI is updated with CPC ID.

The field Generated Opportunity Line Item in the CPC **is not updated by this process.**

Important Assumptions:

1 - Sometimes the currency in the CPC is not matching the currency in the OLI, that's why the system evaluates the rule with and then without currency matching.

2 - Due to the final consignee at the OLI level, we can have multiple OLIs matching one CPC. In the CPC we don't have the final consignee to add into the criteria for comparison.

If the system finds more than one OLI matching the CPC, we take one of the CPCs randomly.

The field **OLI Matching Criteria** in the Opportunity Line Item describes how the field Generated Opportunity Line Item was populated in the CPC:

- if the quote was created from the campaign tool, the field contains 'CPC created inside an active campaign'
- if the quote was created from the quotation tool and the system finds an OLI to match with the Committed CPC, the field contains 'CPC created outside an active campaign'
- if the quote was created from the quotation tool and the system finds an OLI to match with the Committed CPC, the field contains CPC 'created outside an active campaign with currency mismatch'
- if the system doesn't find any OLI to match with the committed CPC, the field contains 'no active OLI for this CPC'

The report **CPCs with or without OLIs** was provided to business for them to have this analysis consolidated.

Report: Opportunities with Opportunity Line Items and Generated Opportunity Line Item
CPCs with or without OLIs

total Active
1

	Stage	Active	Account Name	Product	Region	Opportunity Currency	Generated Opportunity Line Item: Pricing Campaign CPC Name	OLI Matching Criteria	
1	J. KG/2022-11-17/254232	Sent for Approval	☐	KACO GMBH & CO. KG	ALGOFLOX L 206 R	Europe	EUR	Pricing CPC -00051081	CPC created inside an active
2	/2022-11-15/254164	Draft	☐	AMPHENOL CORP	PAI 4203 L HF	North America	USD	Pricing CPC -00056877	CPC created inside an active
3	-11-15/254159	Draft	☐	SIEMENS AG	GALDEN HS 240	Europe	EUR	Pricing CPC -00050314	CPC created inside an active
4	TECHNIK-/2022-11-19/254327	Draft	☐	ASSCON SYSTEMTECHNIK-	GALDEN HS 240	Europe	EUR	Pricing CPC -00053220	CPC created inside an active
5	TECHNIK-/2022-11-19/254328	Draft	☐	ASSCON SYSTEMTECHNIK-	GALDEN HS 240	Europe	EUR	Pricing CPC -00053220	CPC created inside an active
6	TECHNIK-/2022-11-19/254329	Draft	☐	ASSCON SYSTEMTECHNIK-	GALDEN HS 240	Europe	EUR	Pricing CPC -00053220	CPC created inside an active
7	TECHNIK-/2022-11-19/254327	Draft	☐	ASSCON SYSTEMTECHNIK-	GALDEN LS 230	Europe	EUR	Pricing CPC -00053221	CPC created inside an active
8	TECHNIK-/2022-11-19/254328	Draft	☐	ASSCON SYSTEMTECHNIK-	GALDEN LS 230	Europe	EUR	Pricing CPC -00053221	CPC created inside an active
9	TECHNIK-/2022-11-19/254329	Draft	☐	ASSCON SYSTEMTECHNIK-	GALDEN LS 230	Europe	EUR	Pricing CPC -00053221	CPC created inside an active
10	J. KG/2022-11-17/254232	Sent for Approval	☐	KACO GMBH & CO. KG	TECNORFLON PL 455	Europe	EUR	Pricing CPC -00054822	CPC created inside an active
11	J. KG/2022-11-17/254232	Sent for Approval	☐	KACO GMBH & CO. KG	TECNORFLON P 757	Europe	EUR	Pricing CPC -00053122	CPC created inside an active
12	INOING ITALY SPA/2022-11-17/254225	Quote Expired	☐	DAIKIN COMPOUNDING ITALY SPA	ALGOFLOX FS/5	Europe	EUR	Pricing CPC -00026719	CPC created outside an acti
13	INOING ITALY SPA/2022-11-17/254226	Closed - Sales Started	☒	DAIKIN COMPOUNDING ITALY SPA	ALGOFLOX FS/5	Europe	EUR	Pricing CPC -00026719	CPC created outside an acti
14	-11-15/254159	Draft	☐	SIEMENS AG	FOMBLIN Y 25	Europe	EUR	Pricing CPC -00052810	CPC created inside an active

Filters

Close Filter Panel

Show Me

All opportunities

Created Date

All Time

Opportunity Status

Any

Probability

All

Record Type Developer Name

equals ECCO_Sales_Quote

Opportunity Line Item: Created Date

greater or equal 15-Nov-2022

In the transparency dashboard, the OLI will be visible, regardless if the quote was created in the campaign tool or in the quotation tool

The story was moved to production with the following business agreements:

1 - the OLIs (products in the quote) and the CPCs can be linked in both ways

- **CPC contains a lookup field to the OLI**
- **OLI contains a lookup to the CPC**

Actually, when the quote is created from the campaign and the OLI is created from the CPC, the lookup fields are populated in both ways, in the OLI and CPC (is a one-to-one relationship between OLI and CPC).

In this Jira we implemented the rule **OLI contains a lookup to the CPC** when the quote is created outside the campaign and the OLI is created for the same account, product, region and currency but is not created based on the CPC information. The system is populating the lookup field in the OLI. with the CPC id. In the CPC, the lookup remains empty.

Why we did not implemented the link between CPC and OLI?

Due to the final consignee, we can have two active OLIs for 2 different final consignees that can match with one CPC. Since the CPC doesn't have Final Consignee, we don't know the rule to decide which is the correct OLI to assign to the CPC.

However, in the report tat will be provided to the business, for one CPC we will see all the OLIs that can match the CPC and, if needed, the CPCs can be mass uploaded to fill-in them with the correct OLI.

We need the rule to determine which is the correct OLI to link the CPC and implement the first point mentioned

2 - Since we are not populating the the CPC with the OLI, in the transparency dashboard nothing will change. The table used in the transparency is the CPC, and with this Jira we are not changing the CPC.

Jim (@James Flock) also highlighted that, if we link the CPC with an OLI created outside of the campaign, the price in that OLI is not the recommended price or the committed price that we have in the CPC.

When we will link the CPC with the OLI created outside of the campaign, we need to update the CPC with the **Quote Price (after discount)** listed in the OLI before send the information to the transparency dashboard. Otherwise, we will have misalignments.

When an OLI created outside the campaign is matching the CPC, the system needs to update the Committed Price on the CPC with the value in **Quote Price (after discount)** in the OLI.

Reference Jira story:



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