

FD - [CORE] 7 - Price Admin - CSR Tasks : SAP Upload - Update Sales Order - Update Rebate - in SAP

Process & interface specification are all related to :

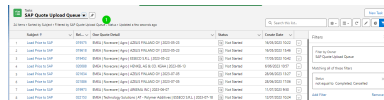
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- Load Price to SAP
- Task available buttons
 - In case of Manual Upload
 - Test on Condition Type
 - In case of Automatic Upload :
 - Test on SAP Customer WP1
 - Test on Condition Type
 - Price Condition Interface Specification
 - Update Sales Order task
 - 1/ Automatically :
 - 2/ Manual when the the task is completed
- Notification on task related to quote

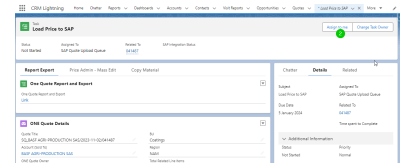
Load Price to SAP

As an Price Admin, I have a Task (Record type "SAP Quote Upload") list which I can check the "Load Price to SAP" tasks that have been assigned to the Queue of my region (1).

From there I can select a pending Task and assign it to myself. The task moves automatically to "In Progress" and I am able to click on the button "Send to SAP" or "Manually uploaded in SAP"



Task ID	Task Name	Status	Created By	Created Date	Updated Date	Task Type	Task Category	Task Sub-Category	Task Description	Task Details
1	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
2	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
3	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
4	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
5	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
6	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
7	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
8	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
9	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
10	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP



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3	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
4	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
5	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
6	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
7	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
8	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP
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10	Load Price to SAP	Pending	Price Admin	2023-01-01	2023-01-01	Task	Price Admin	Load Price to SAP	Load Price to SAP	Load Price to SAP

Note : Only Price Admin with the "Allow SAP Upload Task" can update these specific tasks

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Task Layout updated :

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Then as a in order to perform the following tasks:

- Assign the task to you (or any other Price admin) (2)
 - Automatically the status is moved to In Progress

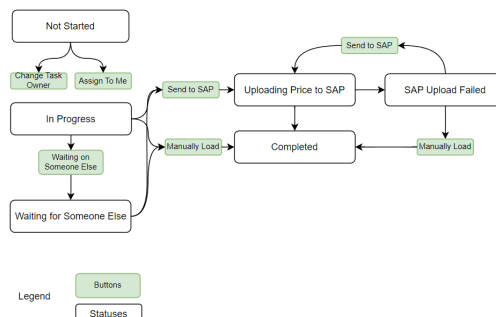
- Review the Quote pricing Data by checking the Quote linked to the Task (3) or quote quoted Details directly displayed on the task (4)
- Open the report with the pricing information of the Quote (5)
 - Check the Sales Org, Distribution Channel and adjust if needed

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- Price Admin can also mass edit OQLI (6) to set Sales Org & Distribution Channel
 - It list all material accepted by customer and let him to update values
 - This feature is only available when the quote is at "SAP Upload Preparation"
- Price Admin can use the "Copy Material" tab to copy all material in one go. (7)
 - It list all material accepted by customer

- Review the rebate if there is any and acknowledge the input in SAP
- For TS if Account Manager requested the Dynasis Update in the One Quote I will see in the task if there is a need for a Dynasis upload and I will need to acknowledge it before closing the task

Task available buttons





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In case of Manual Upload

- you can use the Report Export feature in CSV
- Once it is loaded to SAP go back to the task as click on "Manually loaded to SAP"
- If not all requirements are set you will get an error message
 - requirement =
 - PP_SAP_Sales_Org__c is not empty
 - PP_SAP_Distribution channel is not empty
 - Dyanasus upload Acknowledgment need to be set if Quote.Update Price inDynasis for 18 months = true



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◦ Test on SAP Customer WP1

- Add a test to make sure that all OQLI.SLV44_SAP_Customer__c is not null.

If one of them is null we should display the following error message when the user clicks on "Send to SAP"

One or more Ship to is not in SAP WP1. You can not use the Send to SAP interface. Please set the price manually in SAP.

Test on Condition Type

In case of Automatic Upload :

- Click on the button Send to SAP (6)
- If not all requirements are set you will get an error message
 - requirement =
 - PP_SAP_Sales_Org__c is not empty
 - PP_SAP_Distribution channel is not empty
 - Dyanasus upload Acknowledgment need to be set if Quote.Update Price inDynasis for 18 months = true



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• Test on SAP Customer WP1

Add a test to make sure that all OQLI.SLV44_SAP_Customer__c is not null.

If one of them is null we should display the following error message when the user clicks on "Send to SAP"

One or more Ship to is not in SAP WP1. You can not use the Send to SAP interface. Please set the price manually in SAP.

Test on Condition Type

Add a test to make sure that all OQLI.SLV44_SAP_Condition_Type__c is not null

If one of them is null we should display the following error message when the user clicks on "Send to SAP"

*You have selected a Sales org not linked to any Condition Type. Either change the sales org or ask your Price admin to set the Condition type.**

- A popup is displayed and you can add the name of the CSR you want to receive the task to update sales order in SAP

Add a test to make sure that all OQLI.SLV44_SAP_Condition_Type_c is not null

If one of them is null we should display the following error message when the user clicks on "Send to SAP"

You have selected a Sales org not linked to any Condition Type. Either change the sales org or ask your Price admin to set the Condition type.
*

- A popup is displayed and you can add the name of the CSR you want to receive the task to update sales order in SAP

- Click on Next
- The task
 - Status = Completed
 - SAP Integration status = empty
- All OQLI, accepted by the customer, have the SAP Integration Status = Manually Integrated
- A table on the task display all lines updated

Here is the detail of the report and the data sent to SAP manually through the report :

<https://wiki.solvay.com/display/PFE/SF+-+Novecare+-+Data+push+to+SAP>

Price Condition Interface Specification

- Technically :
 - OQLI where Accepted by Customer = true, with Status = Pending T
 - Task GEN_SAP_Integration_Status_c = Pending
 - Task Status : Uploading price in SAP
 - The task can not be modified by the Price admin at this status
 - If there is an error in calling SAP an App Log is created

- These errors are monitored by the maintenance team
- At this stage the user can see on the task what has been sent to SAP and the status of each lines (only OQLI accepted by customer is displayed there) :

- Once SAP Call Back we update the OQLI and related task if needed :
 - On All accepted by customer OQLI, If ALL OQLI.SAP Integration Status = Integrated

■ Then

- Update Task.SAP Integration Status = Integrated
- Update Task.Status = Completed
- + Post on the CHatter of the TASK

◦ @Task OWNER this Quote #QuoteLink has been successfully integrated in SAP.

◦ Else

- Task.SAP Integration Status = ERROR
- + Post on the CHatter of the TASK

• @Task OWNER this Quote #QuoteLink has not been integrated in SF. Please check.

- If there is an error in the Lines, the user can press again Send to SAP and only not integrated lines will be resend to SAP

Update Sales Order task

Price Condition Interface Mapping :

Create Price Condition SF ->SAP - Specification

1/ Automatically :

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2/ Manual when the the task is completed

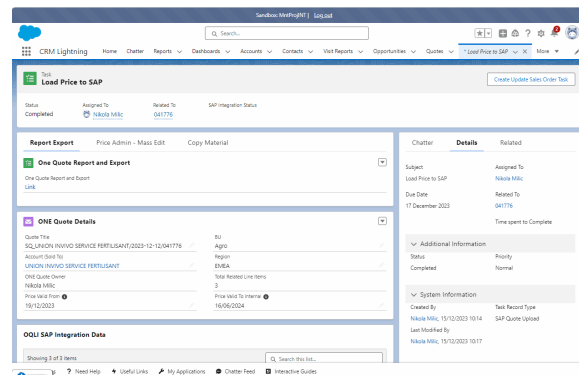
When the task is completed (price loaded) the CSR can go to the SAP Upload task that is completed.

He can create a task to ask a Price admin to update sales order only if the Quote status is closed sales started.

He can create multiple task if he wants.

Every task will have a unique Assignee (Price admin) and a description; The task created will be due to 2 business days after today.

The task will be linked to quote.



FD - [CORE] 7.1 - CSR Update Sales Order - in SAP

Notification on task related to quote

FD - [CORE] Pricing Email Notifications

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As a Price Admin/CSR

I get a reminder if my tasks) and not yet closed in 7 days

so that I take a look at them and close them

- For the task type **Update Open Orders** the
 - due date is 3 business days
 - reminder every 2 working days
- For the task type **Expire Quote, SAP Quote Upload**
 - due date is 2 business days ||
 - reminder every 2 working days || do not send the reminder if the status is "Waiting for Someone Else"
- We are also ok sending the reminder **every day**.

Subject: Task Overdue Notification

Dear [User's Name],

This is an automated notification to inform you that a task assigned to you is **overdue**.

Task Details:

- Task Name: [Task Name]
- Due Date: [Due Date]

Please take the necessary actions to complete the task as soon as possible. If you have already completed the task, please update its status in Salesforce.

Thank you for your prompt attention to this matter.

Best regards,
Pricing team