

# FD - [CORE] 4 - Configure Product Details

Once the Account Manager has created a one quote line item he has to set all needed information.

This document describe all requested p

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rocess and behaviour during that process.

This is based on the new Ux redesign from Summer 2023'

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- 1/ Table Features
  - Unit of Measure (UOM) (7)
- 1/ Set OQLI data
  - 1.1/ Manufacturing plant
  - 1.2/ Shipping plant
  - 1.3/ Ship To
  - 1.4/ Incoterms
  - 1.5/ Estimated Annual Volume
  - 1.6/ Quoted Price
  - 1.7/ Description & Special Customer information
  - 1.8/ Legal Entity
  - 1.9/ Contractual Commitment
  - 1.10/ Minimum Order Quantity & Lead Time Days
  - 1.11/ Scale Pricing
  - 1.12/ specific shipping plant
  - 1.13/ Created from CPC
  - 1.14/ Status
  - 1.15/ Last Quoted price
- 2/ Price Settings / Calculations
  - Freight Guidance Granularity Display
- 3/ Price Settings inactivation
- 4/ VAT

## 1/ Table Features

- All One Quote line items are displayed on line that can be expanded
- Main information are displayed on every lines
- At Draft Status, user can update the following fields: (1)
  - Ship To
  - Incoterms
  - Estimated annual volume
  - Quoted Price

At All One Quote stage :

Chatter Details Configuration & Products Rebates Email Offer

Additional Filters

Incoterms: CIP X Line Status: OK X

| Product 5               | Ship To       | Incoterms | Estimated annual volume | UOM | Guidance     | Filter    | Last Quoted Price | Quoted price | ICM% | Status | Action |
|-------------------------|---------------|-----------|-------------------------|-----|--------------|-----------|-------------------|--------------|------|--------|--------|
| ADHOC SPECIFIC 10000 1H | HEMEL AG & CO | FOB       | 1000                    | KG  | EUR 13.33    | EUR 20    | EUR 44.00         | 72.7%        | ✓    | ✖      |        |
| ADHOC SPECIFIC 10000 1H | HEMEL AG & CO | CIP       | 2000                    | T   | EUR 18000.33 | EUR 20000 | EUR 30000.00      | 60.00%       | ✓    | ✖      |        |

Chatter Details Configuration & Products Rebates Email Offer

Additional Filters

Incoterms: CIP X Line Status: OK X

| Product 5               | Ship To       | Incoterms | Estimated |
|-------------------------|---------------|-----------|-----------|
| RHODACAL BSS 70MRL BULK | KNAUF GIPS KG | CIP       | 14        |

- The Account manager can Sort all columns except "Action" (2)
- The Account manager can use a Quick find search (3)
  - Product Level 5
  - Ship To
  - Ship To Code (PRS /RCS)
- The Account manager can use a filter panel to filter : (4)
  - Product Level 4
  - Incoterm
  - Ship-to
  - Approval Status
  - Accepted by the customer?

- Can be yes, no or none



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- Approver

- The Account manager can see the additional filters or remove filters if needed one by one (5) of all of them (6).



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configuration.

## Unit of Measure (UOM) (7)

The field is a select list that is used to specify the unit of measure used for a particular product.

- Field is pre-populated using UOM value selected on ONE Quote record
- End user can change this selection when adding products on "Add products" screen
- By default, user can select any standard UOM for each line item added to ONE quote
  - (Standard UOM's: **G, KG, LB T**)
- Additionally, if selected product supports alternative UOM's, they will be available for selection
  - (Currently supported alternative UOM's: **L, GAL**)

UOM Selection can be found here [FD - \[CORE\] Alternative Units of Measure \(UOM\)](#)

Full epic for alternative UOM's and it's features



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## 1/ Set OQLI data

The Account manager need to fill some data at OQLI level.

### 1.1/ Manufacturing plant

User can select From the object "Material plant SKU" and the record that match the following :

- OQLI. Product = MPSKU  
Product
- MPSKU.Record type =  
Manufacturing plant
- MPSKU is Active

[illegible]

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If there are only one option available then the system autofill the Manufacturing plant field

If there are more than one option the system display a dropdown list where the user need to select the appropriate Manufacturing plant

### Additional Rule

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To avoid any confusion on dummy plants by region and avoid issues on price guidance calculation, The Manufacturing plant is set as read only on the OQLI LWC if One Quote BU = "AT - Polymer Additives"

## 1.2/ Shipping plant

User can select From the object "Material plant SKU" and the record that match the following :

### 1.3/ Ship To

The Ship to is automatically set to the Quote.  
Ship To.

## 1.4/ Incoterms

Incoterms are set automatically base on the Quote.Incoterms

- OQLI.Product = MPSKU.Product
- MPSKU.Record type = Shipping plant
- MPSKU is Active

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If there are only one option available then the system autofill the Manufacturing plant field

If there are more than one option the system display a dropdown list where the user need to select the appropriate Manufacturing plant

However the user can decide to remove it and change it to a new one.

The user can select ANY ship to. (no restrictions are applied)

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

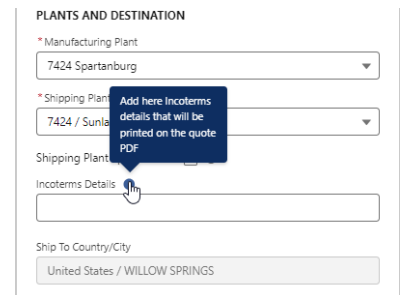
The Ship To Country / City is also displayed below ship to. It is related to the field :

OQLI.Ship To.SLV7\_ACC\_Country\_\_c

However the user can decide to change it to any values

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Incoterms details (13) can be added here. They will be added to the Email PDF of the quote



## 1.5/ Estimated Annual Volume

This field is a manual entry from the user in order to specify the Estimated Annual Volume of that product for the Sold to.

Based on the value set, the system will automatically try to identify the appropriate volume bracket based on the following :

- Product Level 4 + Quote.Region + Quote.Country + Is Active ==> RMP

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- Country level is only active for Aroma

## 1.6/ Quoted Price

The quoted price need to be set by the user.

At OQLI creation the quoted price is prefilled to the Price Guidance.

If the quoted price is below the "Price Guidance" it is requested to set a "Rationale". A validation rule will test this rule

==> Describe calculations of all prices : See [2 / Price Settings Calculation](#)

==> Described calculation of VAT : [see 4/ VAT](#)

==> JPY quotes : a quote with JPY currency can not move to Send for approval if there are some decimals in the quoted price or any scale price.

A warning message is displayed if the user clicks on "Send for Approval"

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 Warning  
Decimal values are not allowed for Quoted Price when the currency is JPY.

## 1.7/ Description & Special Customer information

The user can add any comment in the description. It is used by the Account manager to share information with the line approver.

The Special Customer information set by the Account Manager will be set in the Quote PDF

If a combinaison Product Level 4 + Quote.  
Region + Quote.Country + Is Active is found  
we select the RMP otherwise we try to go at :  
Product Level 4 + Quote.Region + Quote.  
Country + Is Active

- Estimated Annual Volume ==>  
Volume bracket
  - For all volume bracket of the  
RMP select the max "From  
Volume" where From  
Volume >= Estimated  
Annual volume

Based on that selection the following fields are  
calculated :

- Margin Guidance
- Price Guidance

Yearly Financial Impact has been removed

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configuration.

## 1.8/ Legal Entity

Prefilled with the quote Legal Entity

Can be modified by the account manager

## 1.9/ Contractual Commitment

By default it is set to Soft.

User can change it to the following :

- Contract (separate, written, legally  
binding document)
- Hard quote (preventing price  
renegotiation before end date)
- Soft quote (allowing price  
renegotiation before end date)

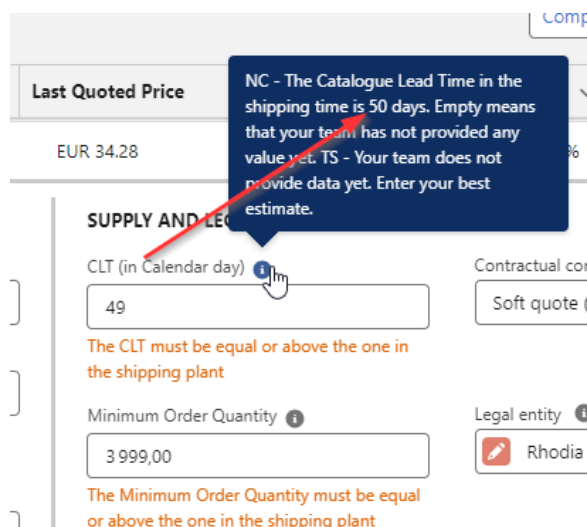
## 1.10 / Minimum Order Quantity & Lead Time Days

When the Shipping plant is specified or  
updated we retrieve the following  
information and set it to the One Quote  
Line Item :

- Can not be modified :
  - Stock Holding  
Strategy
- Can be modified :
  - Quote Line .  
Minimum Order  
Quantity = Shipping  
Plant . Minimum  
Order Quantity
  - Quote Line . Lead  
Time Days =  
Shipping Plant . Lead  
Time Days

The Account manager can change  
theses values following some validation  
rules :

- The "Lead time" must be  
greater than the established  
catalogue lead time
- You can't define a minimum  
order quantity below the  
catalog one.:  
[SLV49\_Minimum\_order\_quant  
ity\_\_c]



Comp

Last Quoted Price

EUR 34.28

**SUPPLY AND LEAD**

CLT (in Calendar day) 

49

NC - The Catalogue Lead Time in the shipping time is 50 days. Empty means that your team has not provided any value yet. TS - Your team does not provide data yet. Enter your best estimate.

The CLT must be equal or above the one in the shipping plant

Minimum Order Quantity 

3 999,00

The Minimum Order Quantity must be equal or above the one in the shipping plant

Contractual commitment

Soft quote (

Legal entity 

 Rhodia



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configuration.

In order to help the Account manager  
the value stored on the Shipping plant  
is displayed in the hover

## 1.11/ Scale Pricing

The Account Manager can specify 3  
Scale pricing if needed.

By clicking on "Enable Scale Pricing"  
we have the following behaviour

- New small table that display  
the following :
  - Bracket 1 :
    - From
      - Must be above from the Bracket 1.
    - Price
      - Must be above from the Bracket 2.
  - Bracket 2 :
    - From
      - Must be above from the Bracket 2.
    - Price
      - Must be above from the Bracket 3.
  - Bracket 3 :
    - From
      - Must be above from the Bracket 3.
    - Price
      - Must be above from the Bracket 4.
- Validation rule based on the  
Price are set :

The screenshot shows the 'Configure & Products' interface. At the top, there's a navigation bar with 'Configure & Products' selected. Below it, there's a table with columns: Product, Buy To, Sell To, Estimated annual volume, UOM, Unit price, Last Used Price, and Scaled price. The table has one row for 'Product 1' with values: Buy To: 10000.00, Sell To: 10000.00, Estimated annual volume: 100, UOM: 1, Unit price: 2.00, Last Used Price: 2.00, and Scaled price: 2.00. Below the table, there's a section for 'Scale Pricing' with a checkbox 'Enable Scale Pricing' and a table for scale pricing. The table has columns: Scale, From, and Price. There are three rows for Scale 1, Scale 2, and Scale 3. The 'From' column for Scale 1 has a value of 10000.00, and the 'Price' column has a value of 2.00. A red arrow points to the 'Enable Scale Pricing' checkbox, and another red arrow points to the 'Scale 1' row in the table.



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o Only at OQLI  
UPDATE

■ &

o One Quote = Draft

■ &

o Enable Scale Pricing  
= True

■ &

o (SLV44\_SAP\_Amount  
2\_\_c >=  
SLV44\_Quoted\_Price  
\_\_c ) OR  
(SLV44\_SAP\_Amount  
3\_\_c >=  
SLV44\_SAP\_Amount  
2\_\_c )

o Error Message

■ Scaling  
Price does  
not fit this  
rule :  
Quoted  
Price >=  
Price  
(Bracket 2)  
>= Price  
(Bracket 3).  
Please  
update  
prices.

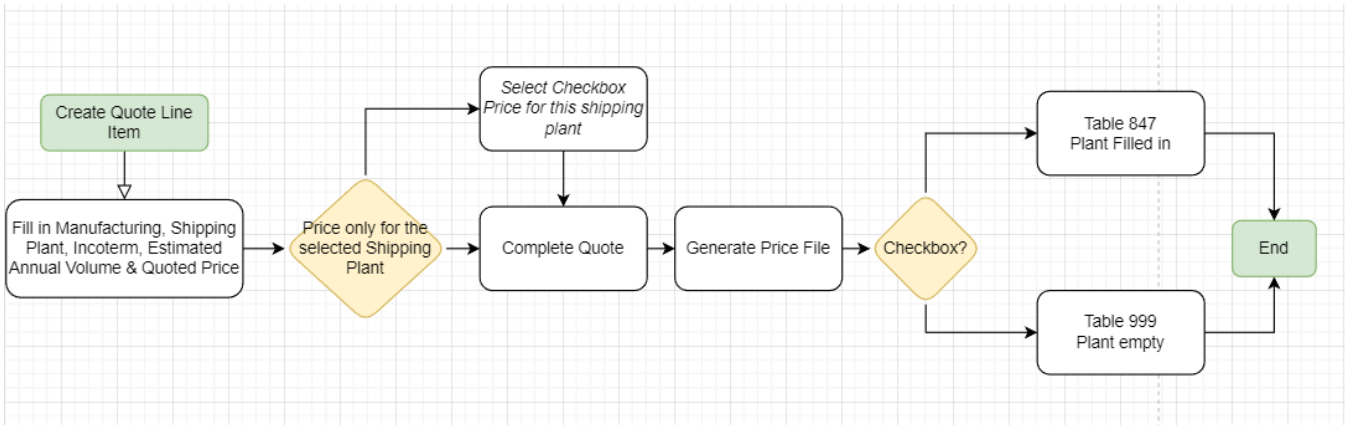
- The Minimum price set here will be used in the Approval Process : [FD - \[CORE\] 5 - Approval](#)

If the user unsets the "Enable Scale Pricing" all the bracket and price are set to null.

## 1.12 / specific shipping plant

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Let the Account manager have the possibility to decide if my price applies to a specific shipping plant or to all.



This field is used in both fields : SLV44\_SAP\_Plant & SLV44\_SAP\_Table from OQLI.

See the detail here : [SF - Novocare - Data push to SAP](#)

## 1.13 / Created from CPC

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If the Display the field "Created by CPC" in the OQLI - SLV48\_Created\_by\_CPC\_c in the OQLI LWC as a blue label below Scatter Plot

Only display it if the value is TRUE

## 1.14 / Status

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At every OQLI we calculate a Status on the fly.

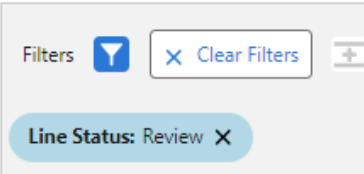
1/ The line has all valid settings and it has a Scale Pricing

2/ There is a warning on the line such as missing information, it blocks the status to be moved to Send for Approval

3/ The line has all valid settings

| <div>Compact Report</div> <div>Add Product</div> |          |        |        |   |
|--------------------------------------------------|----------|--------|--------|---|
| Noted price                                      | ICM%     | Status | Action |   |
| EUR 2.09                                         | -56.46%  | ✓ 1    | 🗑️     | ⌵ |
| EUR 1.00                                         | -108.00% | ⚠️ 2   | 🗑️     | ⌵ |
| EUR 4.09                                         | 55.00%   | ✓ 3    | 🗑️     | ⌵ |

The Account manager is able to filter it if needed in order to eas the process to update lines.



1.15 / Last Quoted price

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

We calculate **Last Quoted Price & Last Quoted Quote Line** when we insert a line to a quote (add product or renew) :

- Status = Draft
- Every modification of “Account OR Region OR BU OR Product Level 5 OR Manufacturing Plant OR Shipping Plant OR Incoterm OR Ship-to”

“We need to find the last quoted price send to SAP”

The last quoted price logic is as the following

- We try to find first an Active QLI with the key : Account + Region + BU + Product Level 5 + Manufacturing Plant + Shipping Plant + Incoterm + Ship-to + **Status = Closed Sales Started + SLV44\_Is\_Active\_\_c = True + Accepted by Customer = True**
- If not, we look up the most recent- QLI (quote.SLV44\_Quote\_valid\_to\_External\_\_c most recent) in Closed Sales Started & Accepted by Customer = true
  - Account + Region + BU + Product Level 5 + Manufacturing Plant + Shipping Plant + Incoterm + Ship-to + **Status = Closed Sales Started + Accepted by Customer = True**
- If not, we look up the most recent - QLIs (quote.SLV44\_Quote\_valid\_to\_External\_\_c most recent) in Expired & Accepted by Customer = true
  - Account + Region + BU + Product Level 5 + Manufacturing Plant + Shipping Plant + Incoterm + Ship-to + **Status = Expired + Accepted by Customer = True**
- If nothing is found, then it displays empty.

Last Quoted price is displayed on the table view of the OQLI

2/ Price Settings / Calculations

==> [FD - \[CORE\] Quote Price Settings](#)

Freight Guidance Granularity Display

Every time relevant information change in the Quote we reset the following records in the OQLI :

- Manufacturing Plant
  - Set by user, see 1.1
- Shipping Plant
  - Set by user, see 1.2
- Region and Market Pricing\*
  - See 1.5
- Volume Bracket
  - See 1.5
- Freight Guidance
- Transfer Cost

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

The label (The label goes just under the Freight Cost)

| Match Level | Message |
|-------------|---------|
|-------------|---------|

Based on these related record we set additional values in the quote. See table on the right

|                         |                                                                                                                                                                                                                                                       |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ship-to Party /Material | Customer-Specific Rate                                                                                                                                                                                                                                |
| Plant /Product Group    | Standard Group Rate                                                                                                                                                                                                                                   |
| No Match                | <p>NO F&amp;D GUIDANCE FOUND + Warning Icon</p> <div>  <p>Unable to locate Jira server for this macro. It may be due to Application Link configuration.</p> </div> |

Freight &amp; Duty Guidance ⓘ



### For the Help Text

1. **Customer-Specific Rate:** "Rate based on customer, material, incoterm. Highest accuracy level."
2. **Standard Group Rate:** "Derived from plant origin, material group, incoterm. General estimation."
3. **Contact Supply Chain:** "No specific freight cost guidance available. You can contact your supply chain team for a more accurate estimation"

### 3/ Price Settings inactivation

[illegible]



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configuration.

If an OQLI has price settings inactive  
and the status of the quote is Draft then

- IF **OQLI.Price Setting Active**  
**= FALSE && Quote.Status =**  
**DRAFT** THEN:
  - Disable all fields  
(except Delete  
button) of the Line  
Item and set a  
banner message on  
top of the Line Item  
with the following  
message:
    - "This Line  
does not  
have an  
active price  
setting : " +  
OQLI.Price  
Setting  
inactive  
Reason

## 4/ VAT

We allow the Account manager to  
select the "Display VAT" Option.

If the box is ticked then the quoted  
price including VAT is added in bracket  
close the quoted price.

Here is how VAT is Calculated : [FD -  
\[CORE\] - Quote PDF Details](#)

**Product(s)**  
[Click here for compact format edit](#)

☒ Display VAT [Add Product](#) [Send for Approval](#)

| Product & Plant                                     | Customer & demand             | Price Guidance                      | Quot of price                                  | Approval & Feedback                             | Supply & Legal info       | Actions                                          |
|-----------------------------------------------------|-------------------------------|-------------------------------------|------------------------------------------------|-------------------------------------------------|---------------------------|--------------------------------------------------|
| Product Level 4<br>(Product)<br>IGEPAL DAP-AT       | * Ship-to<br>CHAMORESE L. X   | Margin<br>Guidance<br>131<br>EUR/KG | * Quoted price EUR (with<br>VAT: 141,25 EUR/KG | <input checked="" type="checkbox"/> Display VAT | Rationale<br>New customer | Legal entity<br>Search Legal on Q                |
| Product Level 5<br>(Material)<br>IGEPAL DAP-AT BULK | * Incoterms<br>FBD            | Margin<br>Floor<br>111,00<br>EUR/KG | Discount<br>0%                                 |                                                 | Description               | Contractual<br>commitment<br>Soft quote (att...) |
| * Manufacturing Plant                               | Estimated Annual Volume<br>KG | Variable<br>Cost<br>11,00<br>EUR/KG | ICM%<br>91,87%                                 |                                                 |                           | Special customer                                 |