

# FD - [CORE] Pricing Email Notifications

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## Global

| Type                  | Name                                                   | Trigger by                                                                                                                                                                                                                                                        | Email to                                                                                                                                                | Configuration                                                                                                                                    | PO2                                           |
|-----------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|
| Pricing Campaign      | <a href="#">Price Update Success</a>                   | When the CPC Refresh Batch is finished<br><a href="#">FD - [CORE] Pricing Campaign - CPC Price Settings</a>                                                                                                                                                       | User that launch CPC Refresh Price Setting Patch                                                                                                        |                                                                                                                                                  | No Logo, No Solvay                            |
| Pricing Campaign      | <a href="#">Price Update Success HTML</a>              | When the CPC Refresh Batch is finished<br><a href="#">FD - [CORE] Pricing Campaign - CPC Price Settings</a>                                                                                                                                                       | User that launch CPC Refresh Price Setting Patch                                                                                                        |                                                                                                                                                  | No Logo, No Solvay                            |
| Pricing Campaign      | <a href="#">Price Update Success Owner</a>             | When the CPC Refresh Batch is finished<br><a href="#">FD - [CORE] Pricing Campaign - CPC Price Settings</a>                                                                                                                                                       | Any Impacted CPC owner will receive email notification                                                                                                  |                                                                                                                                                  | No Logo, No Solvay                            |
| Pricing Campaign      | <a href="#">Price Update Success Owner HTML</a>        | When the CPC Refresh Batch is finished<br><a href="#">FD - [CORE] Pricing Campaign - CPC Price Settings</a>                                                                                                                                                       | Any Impacted CPC owner will receive email notification                                                                                                  |                                                                                                                                                  | No Logo, No Solvay                            |
| Pricing Campaign      | (Inactive) <a href="#">Price Update Success</a>        |                                                                                                                                                                                                                                                                   |                                                                                                                                                         | Inactive                                                                                                                                         | N/A                                           |
| Quote                 | <a href="#">An active One Quote is about to expire</a> | Every Friday<br><br>SLV44_ONE_Quote_Valid_To_Notification__c = TRUE AND<br>SLV44_Status__c = Closed Sales Started AND<br>PP_Is_Quote_Renewed__c = FALSE                                                                                                           | An Account manager will receive on <b>every Friday</b> an Email that will let him now that he has some quotes to renew within 15 Days (Price Valid To). | Flow : ONE Quote Valid To Notification                                                                                                           | <a href="#">Logo</a> , No Solvay              |
| Quote                 | Sent for approval Notification                         | Quote moved to the status : sent for approval + Email reminder is sent to the approver every <b>2 business days</b> if approver has not approved the quote since the first approval notification for more than 2 days<br><a href="#">FD - [CORE] 5 - Approval</a> | Notification send to all the approvers on the quote                                                                                                     | Flow : ONE Quote Notification + One Quote Approval Reminder                                                                                      |                                               |
| Quote                 | OQLI Rejected                                          | An OQLI is rejected<br><a href="#">FD - [CORE] 5 - Approval</a>                                                                                                                                                                                                   | Notification send to the One Quote owner                                                                                                                | Flow : One Quote Line Item Notification                                                                                                          |                                               |
| Quote                 | Approved Quote                                         | Quote moved to the status : "Approved" (fully approved)<br><a href="#">FD - [CORE] 5 - Approval</a>                                                                                                                                                               | Notification send to the One Quote owner                                                                                                                |                                                                                                                                                  |                                               |
| Quote                 | <a href="#">Send Email to Customer</a>                 | <a href="#">FD - [CORE] 6 - Send to Customer &amp; Customer Approves</a>                                                                                                                                                                                          |                                                                                                                                                         |                                                                                                                                                  | <a href="#">Logo</a> , No Solvay              |
| Quote                 | Quote PDF                                              | <a href="#">FD - [CORE] 6 - Send to Customer &amp; Customer Approves</a>                                                                                                                                                                                          |                                                                                                                                                         | All translation are made on Custom Labels in the category : Email Offer One Quote<br><a href="#">All Labels – Salesforce - Unlimited Edition</a> | <a href="#">Logo</a> , <a href="#">Solvay</a> |
| Task related to quote | Task - Overdue Daily Reminder                          | Flow : Task - Overdue Daily Reminder<br><a href="#">FD - [CORE] 7 - Price Admin - CSR Tasks : SAP Upload - Update Sales Order - Update Rebate - in SAP</a>                                                                                                        | Task Owner                                                                                                                                              | Flow : Task - Overdue Daily Reminder                                                                                                             |                                               |

## Technical detailed



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

| Action                                             | Description                                                                                                                                                                                                                                                                                        | When to trigger?                                                   | Flow Entry Conditions (if applicable)                                                                                                                                                                                                                                                                                                                                                                                                        | Specific Action Required            | Where is it used / called?             | Template Type                                                                                                                                                                                                                                                                                                                                                               | Who receives the notifications? |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|
| Status changed to "Approved"                       | When a quote does not need any approval or all line items have been approved, send a notification bell + email to the Quote Owner                                                                                                                                                                  | ONE Quote is Updated                                               | AND(<br>NOT(!{\$Permission.Bypass_Automation})),<br>OR(<br>ISCHANGED(!{\$Record.SLV44_Status__c}),<br>ISCHANGED(!{\$Record.<br>SLV44_Approved_Line_Items_by_Customer__c}),<br>ISPICKVAL(!{\$Record.SLV44_Status__c}, 'Sent for Approval')<br>)                                                                                                                                                                                               | Record Status = Approved            | PP_ON E_Quote_Notification             | Email built on the flow by using a created Text Template with merge fields. Flow also checks if user is ECO or SCO to send the email from the correct FROM address. This email is sent with the ECO/SCO logo                                                                                                                                                                | Quote Owner                     |
| Line Item Approval Rejected                        | When a quote is moved to "Sent for Approval", all approvers receive a notification email. If one of the products has been rejected, the Quote Owner receives a notification bell + email to properly proceed with changes.                                                                         | One Quote Line Item is Updated                                     | AND(<br>NOT(!{\$Permission.Bypass_Automation})),<br>ISPICKVAL(!{\$Record.SLV44_Approval_Status__c}, 'Rejected')<br>)                                                                                                                                                                                                                                                                                                                         | Not applicable                      | PP_One_Quote_Line_Item_Notification    | Email built on the flow by using a created Text Template with merge fields. Flow also checks if user is ECO or SCO to send the email from the correct FROM address. This email is sent with the ECO/SCO logo                                                                                                                                                                | Quote Owner                     |
| Abandoned Account Manager notification             | After a quote is abandoned a notification bell + email will be sent                                                                                                                                                                                                                                | ONE Quote is Updated                                               | Quote.Status ISCHANGED = True AND<br>Quote.Status = ("Closed - Sales Started" OR "Closed - Abandoned")                                                                                                                                                                                                                                                                                                                                       | Quote Status = "Closed - Abandoned" | PP_Update_SAP_Upload_Tasks             | Email is built on the flow by using a created Text template. No logos are sent with these emails. No check is made if the user is ECO or SCO                                                                                                                                                                                                                                | Quote Owner                     |
| Quote Expiration (when the quote validity is over) | Every day a flow runs at midnight and sends a notification bell + email to Quote Owners if the Valid To formula returns TRUE                                                                                                                                                                       | Daily at midnight                                                  | Quote.SLV44_ONE_Quote_Valid_To_Notification__c = True AND<br>Quote.Status = "Closed - Sales Started" AND<br>Quote.Is_Renewed = False                                                                                                                                                                                                                                                                                                         | Not applicable                      | SLV44_ON E_Quote_Valid_To_Notification | Uses the following Email Alert to notify the users: <a href="#">SLV44_One_Quote_Notification</a> . No logos are sent with these email. No check is made if user is ECO or SCO                                                                                                                                                                                               | Quote Owner                     |
| Quotes about to Expire                             | Apex batch job that runs weekly and sends a email to Quote Owners                                                                                                                                                                                                                                  | Every monday at 8am UTC                                            | SELECT Count(Id) recordCount ,OwnerId FROM<br>SLV44_ONE_Quote__c WHERE ((SLV44_Status__c = :oneQuoteStatusSalesStarted AND<br>(SLV44_Quote_valid_to_External__c = NEXT_N_DAYS:30 OR<br>SLV44_Quote_valid_to_External__c = TODAY)) OR<br>(SLV44_Status__c = :oneQuoteStatusExpired AND<br>(SLV44_Quote_valid_to_External__c = LAST_N_DAYS:10 OR<br>SLV44_Quote_valid_to_External__c = TODAY))) AND<br>PP_RenewedTo__c = NULL GROUP BY OwnerId | Not applicable                      | APEX: PP_Notify_Quote_Batch            | The following Email Template is used: <a href="https://syensqo-crm.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00X080000016bfQ%3Fsetupid%3DCommunicationTemplatesEmail">https://syensqo-crm.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00X080000016bfQ%3Fsetupid%3DCommunicationTemplatesEmail</a> | Quote Owner                     |
| Multiple Sold Tos Error                            | When a Task is Completed and a Quote is moved to "Closed - Sales Started", if the Quote is marked as a Multiple Sold To's quote, a batch runs on the backend and created child records. If there is an issue with the creation a App Log record is created and an email is sent to the Quote Owner | Launched from code when issue is found on creation of Child Quotes | Expected_Quotes != Inserted_Quotes OR<br>(Expected_Quotes * Expected_Lines) != Inserted_Lines                                                                                                                                                                                                                                                                                                                                                | Not applicable                      | PP_Batch_Processing_Notification       | Email is built on the flow by using a created Text template. No logos are sent with these emails. No check is made if the user is ECO or SCO                                                                                                                                                                                                                                | Quote Owner                     |