

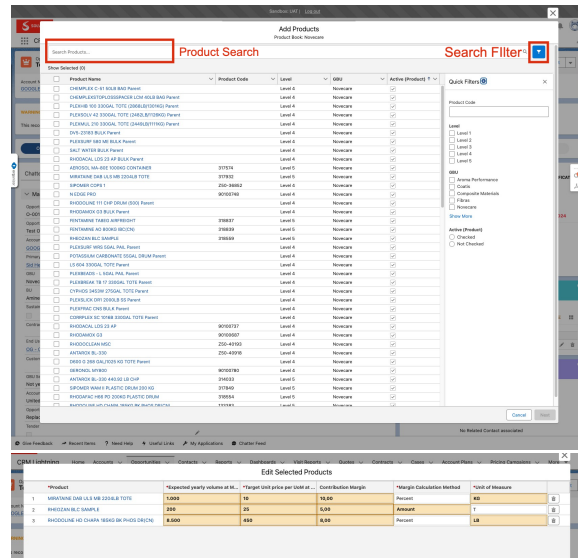
3. Add Product(s) to Opportunity

- 1. Add Product(s)
- 2. Filtering Products
- 3. Edit Selected Products
- 4. Opportunity Line Item Details
- 5. Update Product
- 6. Convert Product volumes to T
 - 5. Error Handling and Validation

Change Log	Date	Owner
Added details for CPROMOG-61 - Getting issue details... STATUS	15 Jan 2025	MILIC-ext, Nikola
and CPROMOG-14 - Getting issue details... STATUS		

1. Add Product(s)

- Once Opportunity is saved, user will automatically be prompted to "Add product" page,
- "Add Products" page will be loaded with list of active products that belong to opportunity selected GBU,
- User can search and select multiple products at this stage.
- User can see following columns that can be used for search:
 - **Product Name** - hyperlink that guides to price book entry (standard salesforce behaviour)
 - **Product Code**
 - **Level** - list only shows levels 4 and 5.
 - **GBU** - equal to opportunity GBU
 - **Active (Product)** - displays if product is active or not. Only active products should be displayed.



2. Filtering Products

- List of products can be filtered using a filter icon on the right of the search bar. These are called quick filters.
- All available columns can be used for quick filtering products, however, filter has to be used so that first, user enters keywords for a product. Then adds filters and click Apply.
- If user does not find the right product using search option, they can go back by pressing "View all" link. This will show all products again.

3. Edit Selected Products

- Once products have been selected, user presses next which leads to "Edit Selected Product" screen
- In this step user has to populate following fields:
 - **Expected Yearly Volume at Maturity** (Required)
 - **Target Unit Price per UOM at Maturity** (Required)
 - **Contribution Margin**
 - **Margin Calculation Method** (Required) - Percent is set as default,
 - **Unit of Measure** (Required) - Tons (T) is set as default.
- Once user fills ins all required fields and presses next, opportunity line items are created.

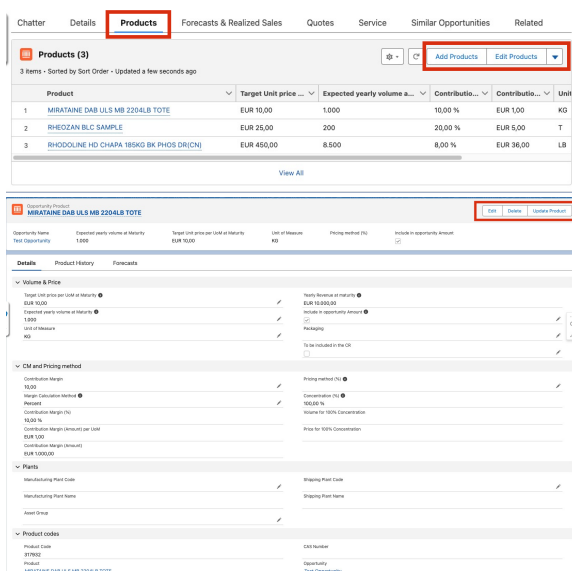
4. Opportunity Line Item Details

- Once products are added to opportunity, user will be redirected back to opportunity page.
- From there, user can open a list of opportunity line items by navigating to "Products" tab on opportunity page.
- User can see a list of products with added details (Volume, Price, Margin)

- Following actions will be available:
 - **Add Products** - Open "Add products" screen
 - **Edit products** - Opens existing products with ability to change initial values, same as edit selected products screen.
 - **Sort Products** - products can be sorted in a certain sequence

When user presses opportunity line item hyperlink, they are guided to the record where they can see additional information:

Field	Description
Target Unit price per UoM at Maturity	Target Unit Price per UoM = Reporting Unit in SAP. Numbers are at maturity.
Expected yearly volume at Maturity	Yearly volume expected to be sold at maturity. Updates the Negotiation history if updated.
Unit of Measure	Determines the UOM for that specific Line Item.
Yearly Revenue at maturity	Expected yearly sales at maturity for this product (Target Unit Price * Expected Yearly Volume)
Contribution Margin	Universal field for calculating contribution margin. Is used in conjunction with Margin Calculation Method. Then calculates the rest of fields based on these inputs.
Margin Calculation Method	Define the master for calculating the Contribution Margin. If “%” in selected, the CM in amount will be automatically calculated based on the % entered. If “Amount” is selected, then it is the reverse.
Contribution Margin (%)	<ul style="list-style-type: none"> • If the Margin Calculation Method is set to 'Percent': <ul style="list-style-type: none"> ○ Calculate Contribution Margin divided by 100. • Otherwise: <ul style="list-style-type: none"> ○ Calculate Contribution Margin divided by Target Unit price per UoM at Maturity
Contribution Margin (Amount) per UoM	<ul style="list-style-type: none"> • If the Margin Calculation Method is set to 'Amount': <ul style="list-style-type: none"> ○ Return the value of Contribution Margin. • Otherwise: <ul style="list-style-type: none"> ○ Calculate (Contribution Margin / 100) * Target Unit price per UoM at Maturity.
Contribution Margin (Amount)	Contribution Margin (Amount) per UoM * Expected yearly volume at Maturity
Include in opportunity Amount	Check this field to include the "Product Total Amount" into the "Expected Yearly Revenues" of the Opportunity
Packaging	Text field
To be included in the CR	



1. Automatic Conversion of Units of Measure

- Converts product volumes from supported UOMs (e.g., L, GAL, KG, LB) into metric tons (T) automatically.
- Ensures consistency across records, regardless of the original UOM.

Example:

If a product volume is entered as 1,000 liters (L), the field calculates its equivalent in metric tons based on the product's density or conversion factor.

Year	Volume	Unit of Measure	Product Price	Price	Price in EUR
2025	1,000.00	GAL	45.443	EUR 19.30	19.30
Subtotal	1,000.00	GAL	45.443	EUR 19.30	19.30
Year report (L)	100.00	L	100.000	EUR 19.30	19.30
Subtotal	100.00	L	100.000	EUR 19.30	19.30
Year report (T)	1,000.00	T	1,000.000	EUR 19.30	19.30
Subtotal	1,000.00	T	1,000.000	EUR 19.30	19.30
Subtotal	2,100.00		1,145.443	EUR 38.60	38.60

2. Predefined and Customizable Conversion Factors

- Uses predefined conversion factors for standard UOMs, such as:
 - **1 Liter Metric Tons** (based on density)
 - **1 Gallon Metric Tons** (specific to product data)
- Allows for dynamic updates when product details, such as alternative UOMs, are modified.

3. Seamless Integration with Records

- Available on key objects such as:
 - **Opportunity Line Items (OLI)**: For sales forecasting and opportunity management.
 - **Product Forecasts**: For forward-looking volume predictions.
- Updates dynamically during record creation or updates, ensuring real-time accuracy.

4. Reporting and Analytics

- **Visibility in Reports**: The field is included in standard and custom report types to facilitate:
 - Sales performance analysis.
 - Forecast accuracy assessment.
 - Regional or product-level volume comparisons.
- **Hidden on Layouts**: By default, it may not be visible on record pages but is always accessible for reporting.

5. Error Handling and Validation

- Automatically sets the field to **0** if:
 - No valid conversion factor is available.
 - The selected UOM is unsupported.
- Marks records for review when data is missing, ensuring data integrity.