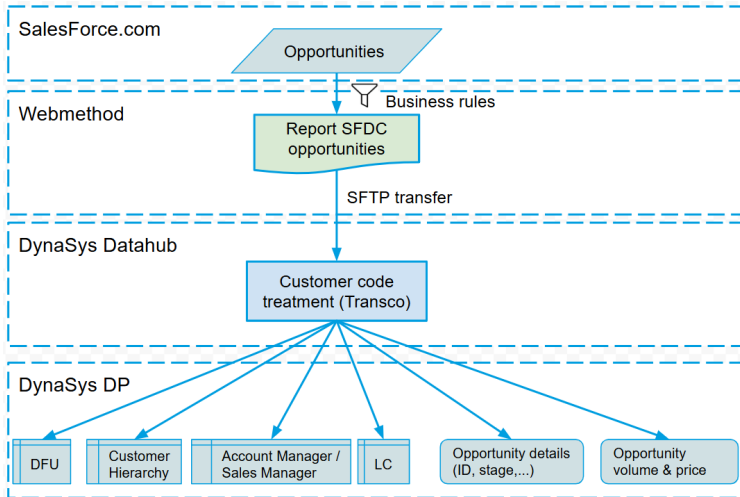


4.4.1 - Prospects and Opportunities interface

- Overview of the integration process
- Opportunities extract from SFDC
- Prospects/CRM DFU creation and/or transcodification
- Suffix based on the source system
 - Customer/DFU transcodification
 - Master table data integration
- Opportunities details integration
 - Opportunity details
 - Opportunity volume and price
- GBU functional documents

Overview of the integration process



Opportunities extract from SFDC

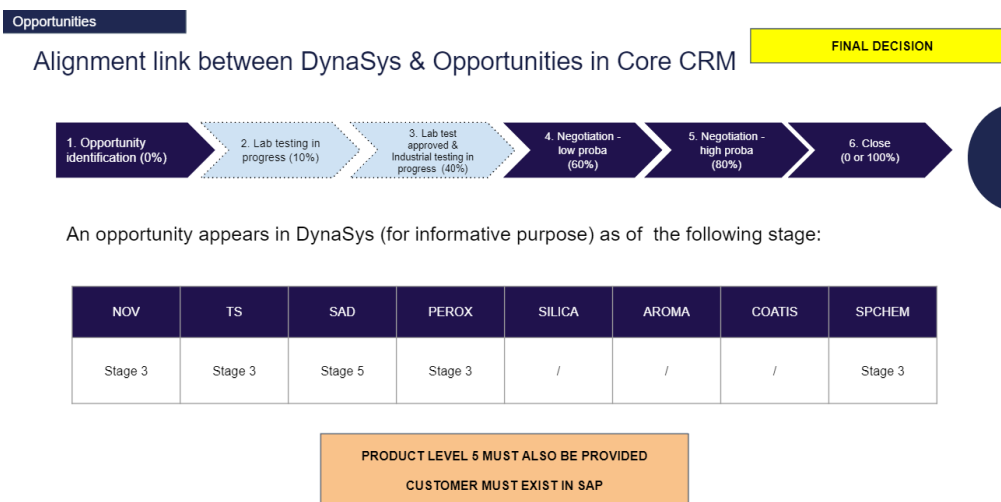
The opportunities are extracted from SFDC based on 2 criteria :

- Product level :

Material (=Product level 5 in SFDC) must be registered in the Opportunities.

- Stage :

Opportunity management process was reviewed in July 2021. Each GBU defined from which stage the Opportunities should be integrated in DynaSys :



Opportunities are extracted from SFDC by Webmethod (Middleware) only based on the generic rules as defined during the project.

The rules to extract SFDC fields into the .csv file DYS_SF_CRM.

The specific integration rules are implemented in DynaSys (in the GetUnC).

GBU SCo	Opportunities integration	Additional specific integration rules
Aroma Performance	No	N/A
Novecare	Yes	Opportunities stage <> Closed Priority project <> E Revenue > 50 000 €
Technology Solutions	Yes	/

GBU ECo	Opportunities integration	Additional specific integration rules
Perox	Yes	/
Silica	No	N/A
Soda Ash & Derivatives	Yes	/
Special Chem	In progress	

Prospects/CRM DFU creation and/or transcodification

Suffix based on the source system

Suffix is determined based on the Source system identified in the CRM file.

If the Source system = RCS, then the Suffix should "R"

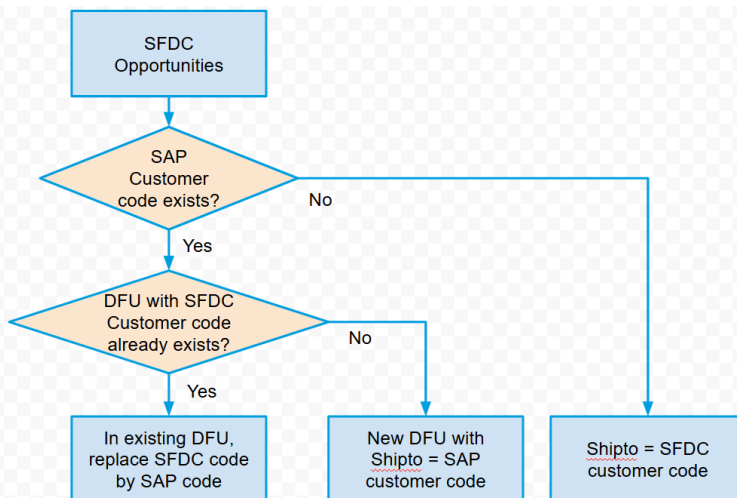
If the Source system = PF1, then the Suffix should "S"

Note : The source system is maintained in CRM SFDC based on the Product code (in case of inconsistency, a ticket must be rased to CRM team).

Customer/DFU transcodification

SFDC code = Account ID

Transcodification process to be described (INT_TRANSCO)



*In DFU check, ignore the DC dimension, only check the Material:Shipto combination.

Each new opportunity is imported as Material:shipto@DC in Dynasys hierarchy based on the SFDC codification of the prospect. Once the shipto is codified into SAP, the related opportunity has to be changed into the final DFU.

This process is performed through INT_TRANSCO table.

Master table data integration

- Material:Shipto@DC + Shipto@DC tables

Field	Rule
Material	= Product code + Suffix
Shipto	Result of customer algorithm for PF1 : if filled, customer PF1 + 'S' else customer SFDC for WP1 : if filled, customer WP1 + 'R' else customer SFDC
DC	= BU from Material hierarchy for PF1 or DC + 'R' for WP1

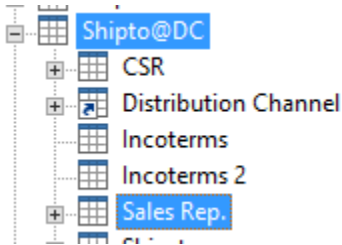
- Ship-to/Prospect

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Field	Rule
Shipto	Result of customer algorithm (Customer transcodification)
City	= [Customer_Country]_ZZ_[Customer_City]
Region	= [Customer_Country]_ZZ
Country	= Customer Country

- Sales Rep

Sales Rep. interfaced in Shipto@DC master table



If GBU = SD, PE, TS

Field	Rule
Shipto	= Result of customer algorithm (add suffix if SAP code) for PF1 : if filled, customer PF1 + 'S' else customer SFDC for WP1 : if filled, customer WP1 + 'R' else customer SFDC
DC	= BU from Material hierarchy for PF1 or DC + 'R' for WP1
Sales Rep	= Sales Rep code from DYS_BW_SREP interface for WP1

- Sales Rep / Account Manager

To be reviewed

If GBU = SD, PE

Interfaced in ProductGroup:Shipto@BU table

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Field	Rule
ProductGroup	= ProductGroup from Material hierarchy
Shipto	= Result of customer algorithm (add suffix if SAP code) for PF1 : if filled, customer PF1 + 'S' else customer SFDC for WP1 : if filled, customer WP1 + 'R' else customer SFDC
BU	= BU from Material hierarchy for PF1 or DC + 'R' for WP1
Account Manager	= Sales Rep Account Manager Code

If GBU = TS, no mapping.

If GBU = SI, no mapping. (no opportunities imported for SI)

- Local Currency

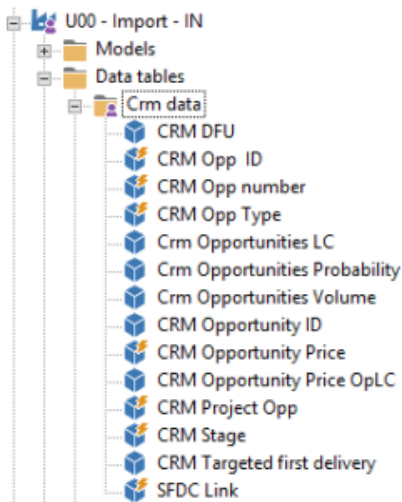
Parameter at level 2:

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Field	Rule
Material	= Product code + suffix
Shipto	= Result of customer algorithm (add suffix if SAP code)
BU	= BU from Material hierarchy
LC	= Currency code (last column)

Opportunities details integration

Opportunities details are imported in the User model U00 :



Opportunity details

Different information are imported :

- Opportunity Number
- Opportunity ID
- SFDC Link (based on the Opportunity ID)
- Opportunity Stage
- Opportunity Probability
- Opportunity Targeted First delivery
- Opportunity Project Opp

Opportunity volume and price

Forecast volume = Expected Yearly Volume

Split by month from the Targeted First Delivery Date

-

Field	Rule
Material	= Product code + Suffix
Shipto	= Result of customer algorithm (add suffix if SAP code)
DC	= BU from Material hierarchy
Month	-
CRM Opportunities	Volumes are all received in tons (i.e., "Opportunities_volume_Y0", "Opportunities_volume_Y1", "Opportunities_volume_Y2"). A conversion has to be done to kg before integrating them. The "UoM" column is only being displayed as information (i.e. the original UoM associated with the Production in SFDC BEFORE conversion to tons) and is NOT related to the volumes that are all in tons.
CRM Opportunities Price	Prices are received in €/ton. The "Currency" column is only being displayed as information (i.e. the original Currency in SFDC). <i>The prices are not converted when "Targeted first delivery date">current year (because volume Y+0 = 0 and no conversion is calculated) and unit of measure different from T (as in T no need to convert) => a fix was set up directly into the DH</i>

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- Opportunity Monthly Volume calculation :

TFD = Target First Delivery date

If TFD(year) < Current year,

(Vo/12) from Jan Y0 -> Dec Y0

(V1/12) from Jan Y1 -> Dec Y1

(V2/12) from Jan Y2 -> Dec Y2

Else if TFD(year)= Current year (Y0),

(Vo/number of months from TFM -> End of TFY) from TFD -> Dec Y0

(V1/12) from Jan Y1 -> Dec Y1

(V2/12) from Jan Y2 -> Dec Y2

Else if TFD(year) = Y + 1,

0 from Jan Y0 -> Dec Y0

(V1/number of months from TFM -> End of TFY) from TFD -> Dec Y1

(V2/12) from Jan Y2 -> Dec Y2

Else if TFD(year) = Y+2

0 from Jan Y0 -> Dec Y0

0 from Jan Y1 -> Dec Y1

(V2/number of months from TFM -> End of TFY) from TFD -> Dec Y2

- Opportunity Monthly Price determination

CRM price = P0 from current month -> Dec Y0

CRM price = P1 from Jan Y1 -> Dec Y1

CRM price = P2 from Jan Y2 -> Dec Y2

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GBU functional documents

Not all the GBUs are currently importing the Opportunities into DPx (ex: Spe Chem). What is more, Opportunities DFUs tend to be less followed/taken into account than standard (SAP) DFUs.

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