SPP - IPP-182 SF - Pricing Campaign CPC object and Details

- Pricing Campaign CPC object
- Data Dictionary - Pricing Campaign CPC
- Compact Layout
- Page Layout
- Lightning Record Page (activated as Org Default)
- Validation Rules
- Automations Required
    - 1. Account lookup retrieval
    - 2. CPC Owner retrieval
    - 3. Product retrieval
    - 4. Committed Price default value
- Notifications
- Permissions
- Reports Required for Data control purposes

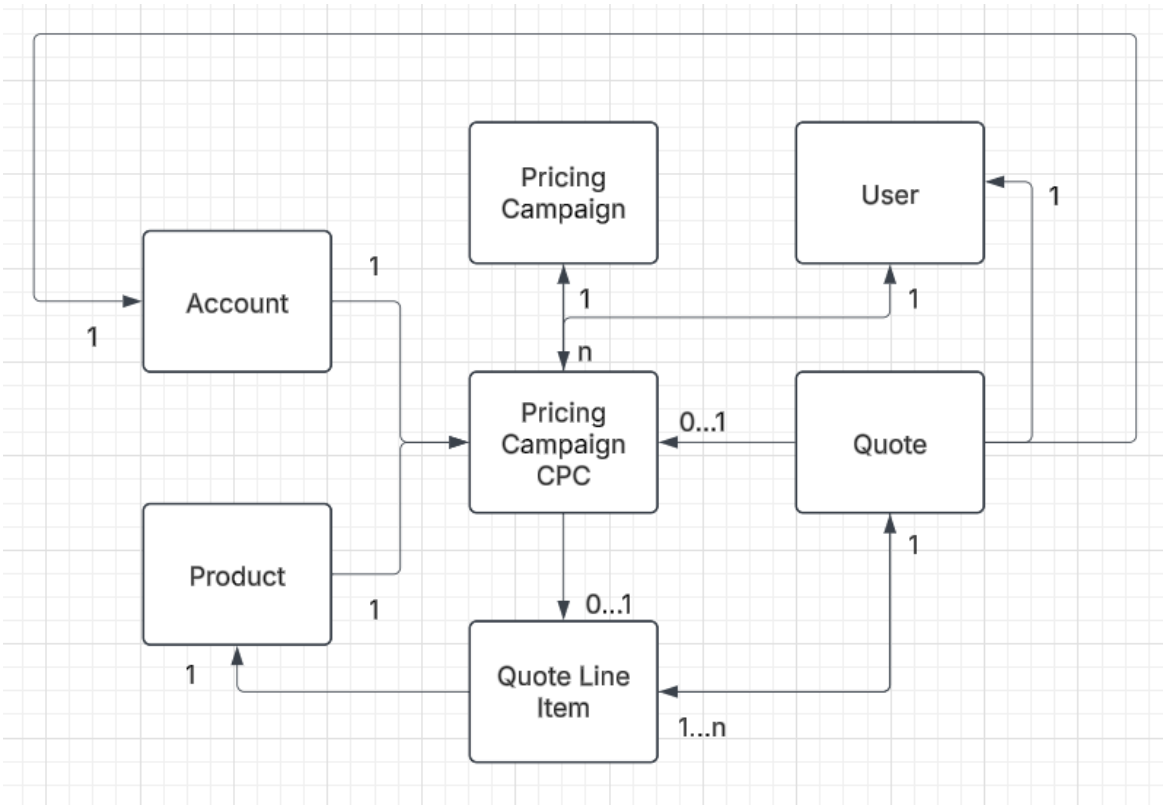
Original requirements in

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

Split from

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

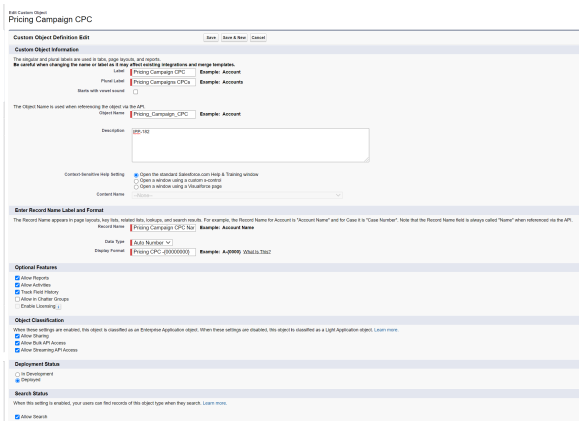
Pricing Campaign CPC object



Create a new custom object : named ***Pricing Campaign CPC*** with: the following characteristics:

Label	Pricing Campaign CPC
Plural Label	Pricing Campaign CPCs
Object Name	Pricing_Campaign_CPC

Description	IPP-182
Record Name	Pricing Campaign CPC Name
Data Type	Auto Number
Display format	CPC -{00000000}
Allow Reports	True
Allow Activitie	True
Track Field History	True
Allow in Chatter Groups	False
Enable Licensing	False
Allow Sharing	True
Allow Bulk API Access	True
Allow Streaming API Access	True
Deployment Status	Deployed
Allow Search	True
Record Types	None required (Master only)
Tab	No tab required



Data Dictionary - Pricing Campaign CPC

	Field Name	Current Implementation	Apex Class references	API Name	Data Type	Track History	Required	Read Only	Picklist Values formula
1	**Owner**			Owner	Lookup (User, Group)	Yes			
2	**Account Manager Review**			Account_Manager_Review__c	Picklist	Yes			• No Re d (de val • Re • Co ed
3	**Annual sales**			Annual_sales__c	Number (16, 2)			Yes, on layout	
4	**Annual volume**			Annual_volume__c	Number (16, 2)			Yes, on layout	
5	**Capped Reco price - Document Currency**	**Capped Recommended price - Document Curr**	**Updated**	Capped_Reco price_Document_Currency__c	Number (16, 2)			Yes, on layout	
6	**Capped Reco price - Pricing Currency**	**Capped Recommended price - Pricing Curre**	**updated**	Capped_Reco price_Pricing_Currency__c	Number (16, 2)			Yes, on layout	

7	**Capped Recommended price (%)**	**Capped Recommended price(Number)**	**ECCOPricingCampaignService**	Capped_Recommended_price__c	Percent (16, 2)			Yes, on layout	
8	**Committed price**			Committed_price__c	Number (16, 2)	Yes			
9	**Contracting model**			Contracting_model__c	Text Area (255)			Yes, on layout	
10	**Country**	**Picklist**		Country__c	Text Area (255)			Yes, on layout	
11	**CPC Status**	**Picklist**	**ECCOPricingCampaignService,** **ECCOPricingCampaignService_TEST**	CPC_Status__c	Formula (Text) blocked URL				IF(Quote_ = null, TE (Quote__r StageNam TEXT (Account_ ger_Revie))
12	**Dataiku ID**	**Dataiku__c**		Dataiku_ID__c	Text(50) (External ID)			Yes, on layout	
13	**Decision logic (path to microsegment)**			Decision_logic_path_to_microsegment__c	Text Area (255)			Yes, on layout	
14	**Document Currency**	**Picklist**	**updated**	Document_Currency__c	Text Area (255)			Yes, on layout	

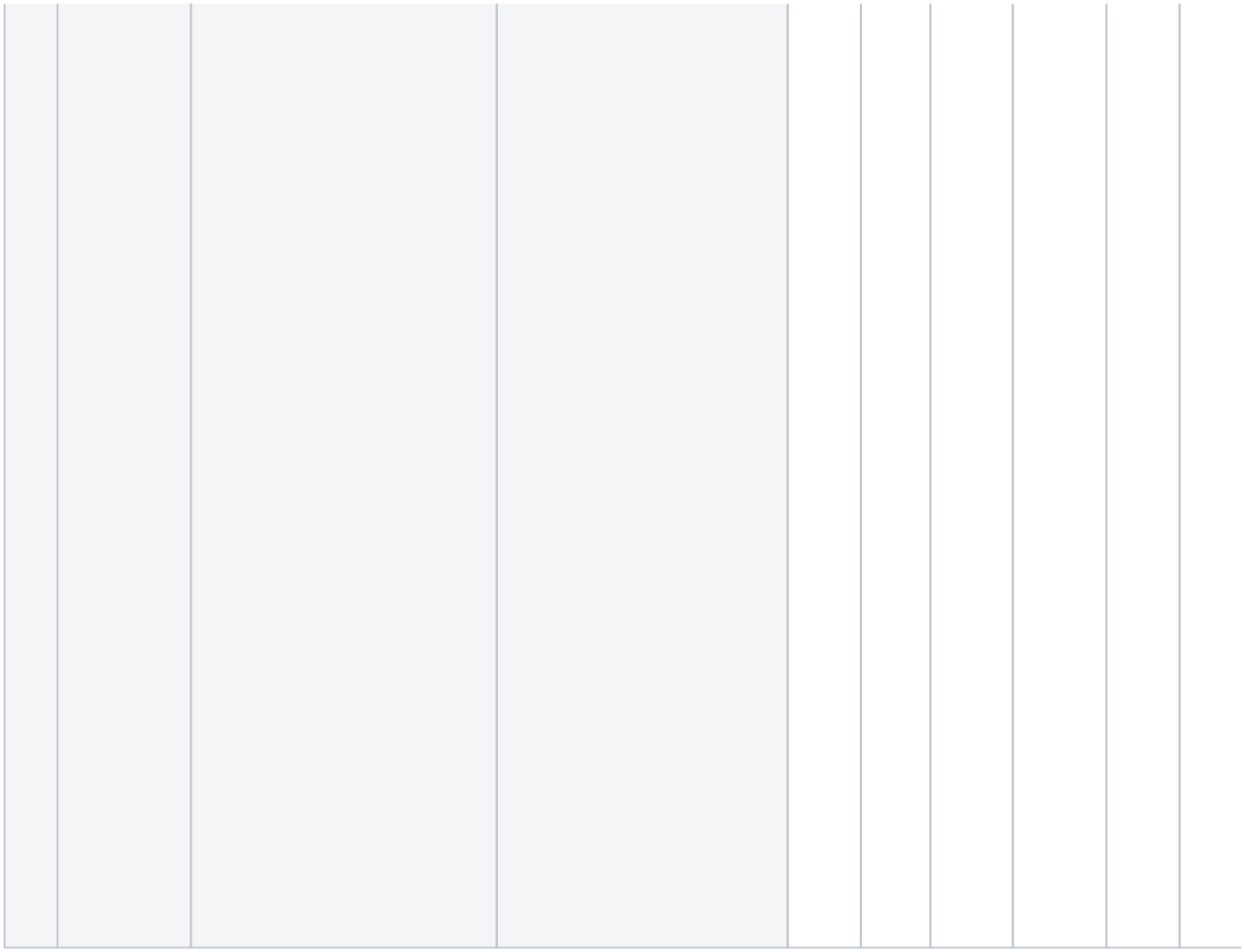
15	**End Use**	**Picklist**	**updated**	End_Use__c	Text Area (255)			Yes, on layout	

16	**Forecasted annual volume**			Forecasted_annual_volume__c	Number (16, 2)			Yes, on layout	
17	**FX rate used**			FX_rate_used__c	Number (16, 2)			Yes, on layout	
18	**Important features**	**Important_features_array__c**	**updated**	Important_features__c	Long Text Area (32768)				
19	**Last price**			Last_price__c	Number (16, 2)			Yes, on layout	
20	**Local Currency**	**Picklist**		Local_Currency__c	Text Area (255)			Yes, on layout	

21	**Market Cluster**	**Picklist**		Market_Cluster__c	Text Area (255)			Yes, on layout	
22	**Market Segment**	**Picklist**	**ECCOPricingCampaignService,** **ECCOPricingCampaignService_TEST updated**	Market_Segment__c	Text Area (255)			Yes, on layout	
23	**Microsegment (node)**			Microsegment_node__c	Number (16, 2)			Yes, on layout	
24	**Modelling approach**			Modelling_approach__c	Text Area (255)			Yes, on layout	
25	**Modelling level**			Modelling_level__c	Text Area (255)			Yes, on layout	
26	**Node price**			Node_price__c	Number (16, 2)			Yes, on layout	
27	**Price reco rationale**			Price_reco_rationale__c	URL(255)			Yes, on layout	
28	**Pricing Campaign**			Pricing_Campaign__c	Lookup (Pricing Campaign)			Yes, visible only on Compact Layout	

29	**Pricing Currency**			Pricing_Currency__c	Picklist	Yes		Yes, on layout	Global Va Set: Pricin Currency • EU Eu • BG Bu n L • BR Bra Re • CH Sw Fra • CN Ch Yu • GB Bri Po • HK Ho Ko Do • IN Ind Ru • JP Jap e Y • KR Ko Wo • KZ Ka tan Te • RU Ru Ro • SE Sw Kro • SG Sin re • TH Tha Ba • US U.S Do
30	**Pricing Increment - Document Currency**			Pricing_Increment_Document_Currency__c	Number (16, 2)			Yes, on layout	
31	**Pricing Increment - EUR**			Pricing_Increment_EUR__c	Number (16, 2)			Yes, on layout	
32	**Pricing Increment - Pricing Currency**			Pricing_Increment_Pricing_Currency__c	Number (16, 2)			Yes, on layout	
33	**Pricing region**			Pricing_Region__c	Picklist			Yes, on layout	Use the n created G Value Set ng Region
34	**Product**			Product__c	Lookup (Product)	Yes		Yes, visible only on Compact Layout	

35	**Product Code**	**Text Area(255)**	**ApexClass SmartFactory ApexClass ECCOPricingCampaignService ApexClass PricingCampaignCPC_UpdateFields_Test ApexClass ECCOPricingCampaignService_TEST ApexClass PricingCampaignCtrl_Test Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications Flow Pricing Campaign CPC sold to Notifications**	Product_code__c	Text(20) (External ID)	Yes		Yes, on layout	
36	**Product H4**	**Picklist**	**updated**	Product_H4__c	Formula (Text) blocked URL				TEXT (Product_ Product_H acket__r. Product_H ame__c)
37	**Product Manager**			Product_Manager__c	Formula (Text) blocked URL				Product__ Product_M er__r. LastName " & Produc Product_M er__r. FirstName
38	**Projected sales impact**			Projected_sales_impact__c	Number (16, 2)			Yes, on layout	
39	**Quantified importance of feature**	**Quantified_importance_of_feature_array__c**		Quantified_importance_of_feature__c	Number (16, 2)			Yes, on layout	
40	**Quote**			Quote__c	Lookup (Opportunity)	Yes		Yes, visible only on Compact Layout	

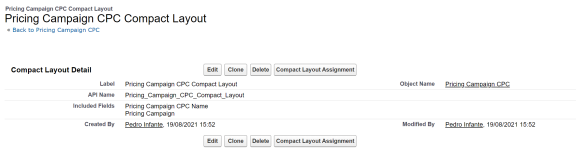


41	**Reason for rejection**			Reason_for_rejection__c	Picklist	Yes			• Co tive thr • Gr cus r o init • Pri fix co • Cu er pro dis ue • Oth (Pl des)
42	**Region**	**Picklist**	**ApexClass SmartFactory ApexClass ECCOPricingCampaignService ApexClass AccountController ApexClass PricingCampaignCPC_UpdateFields_Test ApexClass ECCOPricingCampaignService_TEST ApexClass PricingCampaignCtrl_Test**	Region__c	Formula (Text) blocked URL				Sold_To_Reporting_on_ECCO
43	**Rejection description**			Rejection_description__c	Text Area (255)	Yes			
44	**Sold-To**			Sold_To__c	Account Lookup	Yes		Compact Layout	
45	**Sold-To SAP Name**	**Not present**	**created**	Sold_To_SAP_Name__c	Text Area (255)			Yes, on layout	
46	**Sold-To Code**			Sold_To_Code__c	Text Area (255)			Yes, on layout	
47	**Team Cluster**	**Picklist**		Team_Cluster__c	Formula (Text) blocked URL				TEXT (Sold_To_Team_Clu _c)
48	**Uncapped Recommended price - EUR**			Uncapped_Recommended_price_EUR__c	Number (16, 2)			Yes, on layout	
49	**Uncapped Recommended price (%)**			Uncapped_Recommended_price__c	Percent (16, 2)			Yes, on layout	

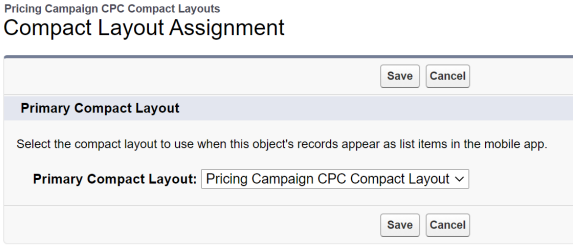
50	**Unit of Measurement**	**Picklist**	**ApexClass ECCOPricingCampaignService ApexClass ECCOPricingCampaignService_TEST**	Unit_of_Measurement__c	Text Area (255)			Yes, on layout	
51	**Weighted average price**			Weighted_average_price__c	Number (16, 2)			Yes, on layout	

Compact Layout

New Compact Layout



Compact Layout Assignment



Compact Layout Selected Fields

Page Layout

See

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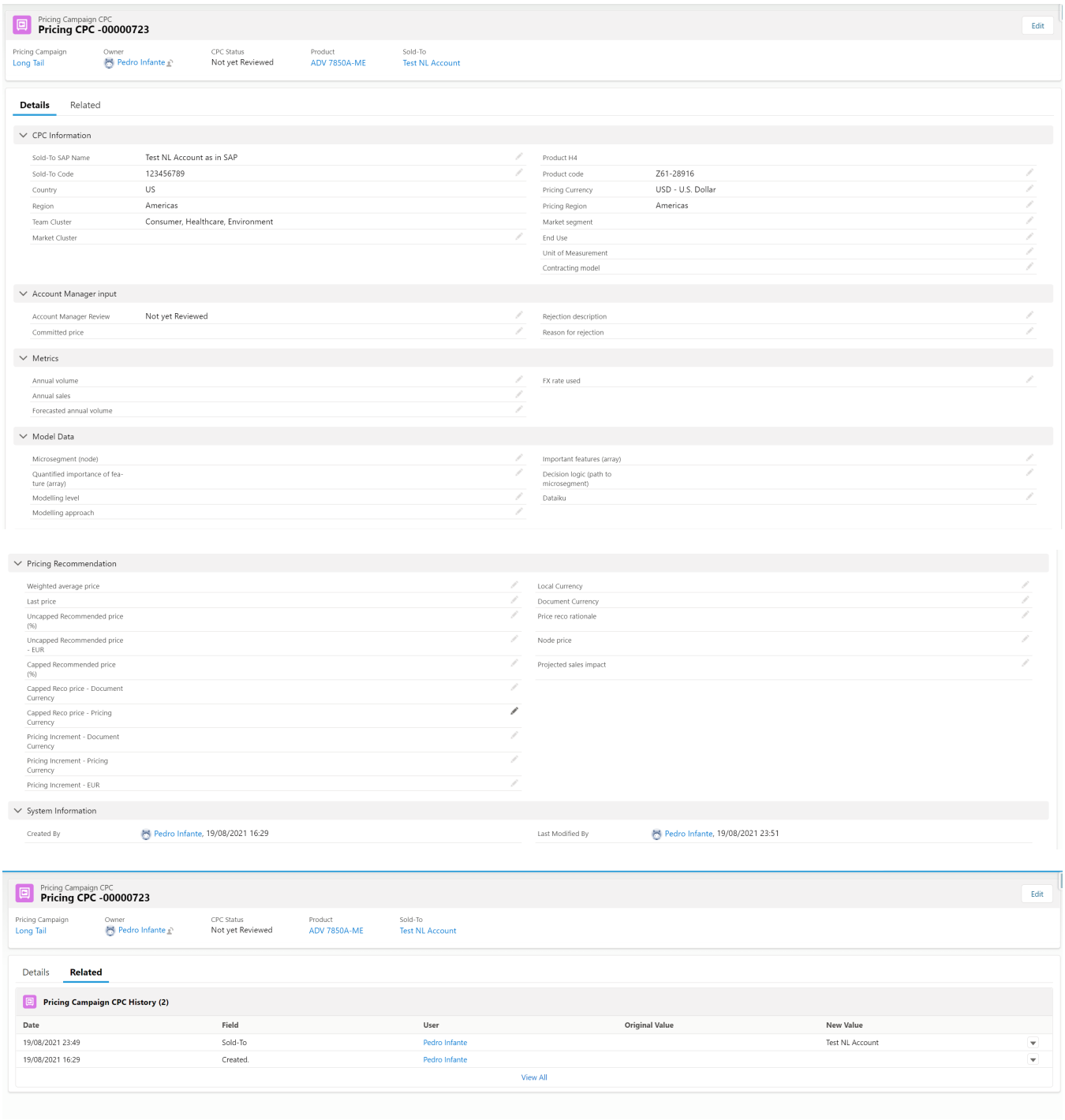
for new layout definition

Lightning Record Page (activated as Org Default)



Validation Rules

See

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for updated solution

Validation Rule Name	Formula	Error Message	Error Location
Account_Manager_Rejected	`AND(ISPICKVAL (Account_Manager_Review__c,'Rejected'),ISBLANK(TEXT (Reason_for_rejection__c)))`	Please provide a Reason for Rejection.	Field: Reason for Rejection
Account_Manager_Review_cannot_be_null	`TEXT(Account_Manager_Review__c) = null && ! isNew()`	Account Manager Review cannot be null.	Field: Account Manager Review

Automations Required

1. Account lookup retrieval

On insertion of Pricing Campaign CPC record - the Sold_To_Code__c value should be used to do a lookup on all the Account records (specifically on its field Account___r.SAP_Sold_To_Number__c);

- If a match is found between Pricing_Campaign_CPC__r.Sold_To_Code__c AND Account___r.SAP_Sold_To_Number__c - populate Pricing_Campaign_CPC__r.Sold_To__c with the same ID as the one retrieved from the Account record with the matching Account___r.SAP_Sold_To_Number__c
- If no matching Account___r.SAP_Sold_To_Number__c is found - leave Pricing_Campaign_CPC__r.Sold_To_Code__c = null

2. CPC Owner retrieval

On insertion of Pricing Campaign CPC record - the standard Owner User lookup needs to be the same as the Account Owner from the Account lookup (Sold-To) retrieved from the automation Account lookup retrieval.

3. Product retrieval

On insertion of Pricing Campaign CPC record - the Product_Code__c value should be used to do a lookup on all the Product records (specifically on its field Product___r.Material_Group__c);

- If a match is found between Pricing_Campaign_CPC__r.Product_Code__c AND Product__r.Material_Group__c - populate Pricing_Campaign_CPC__r.Product__c with the same ID as the one retrieved from the Product record with the matching Product__r.Material_Group__c
- If no matching Product__r.Material_Group__c is found - leave Pricing_Campaign_CPC__r.Product__c = null

4. Committed Price default value

On record creation, the number field Committed_Price__c needs to be pre-populated with the same value inserted in the field Capped_Reco price_Pricing_Currency__c.

Notifications

Full requirements captured in the context of

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

Permissions

Detailed analysis being done in

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The object Pricing Campaign CPC needs to be aligned with Account access permissions (confidentiality, roll up to managers)

Sharing and security : Private (only Owner and user above in role hiearchy) + Edit access.

Do we need to give a view all and/or modify all to some profiles or users ?

Is some region managers who need to see more than their records ?

What about confidential accounts ? Access only by owner or account team ? Product manager access ?

Reports Required for Data control purposes

Report on any Pricing Campaign CPC record where Sold_To__c = null OR Product__c = null

Purpose: be able to see which CPC records where inserted where no match was found for the Account SAP Code or Product SAP Code or that were inserted without a value in ***Capped Reco price - Pricing Currency***

NOE, Julien - who will manage this data? What is the goal of "controlling" these failed insertions of CPC records? Will it be: analyzing the discrepancies and correct the data in Dataiku/SF/SAP so that the Codes match across the systems and no more CPC insertions fail in the future due to mismatched Product or Account Codes?

Story specific for reports - Placeholder Story not filled in yet -

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