

Foundational use case 00 – master data and general system setup

As a [Pricing Manager/Sales Rep], I want to have basic master data in my system, like product master, customer master, transaction data, currency data and Product Unit of Measure data. Also I want to have roles and entitlements, SSO and Plasma set up.

Functional Requirements

This use case 00 covers all basic inbound data that are needed to implement every use case.

- **Inbound data:**
 - Product Master
 - Product Cost Data
 - Product Unit of Measure
 - Customer Master
 - Transactional data / Invoice line items
 - Currency data
- **Roles & Entitlements**
- **Single Sign-On**
- **Pricefx Plasma**

Non-Functional Requirements

- This use case is a foundational use case, supporting the other use cases.

Reporting and Dashboards

- Outside the Plasma dashboards mentioned in the user stories, there are no dashboards part of this use case.

Measures, Calculation and Decision-Making Key Performance Indicators

- For the inbound data no calculations are in scope of this use case; data needs to be delivered clean and fully

Solution Design

- **Roles & Entitlements**
 - Use out of the box Business Role, Business Group, User Role of the PFX
 - The user permissions will be setup at the Business Role level
- **Single Sign-On**
 - Enable the SSO configuration in the SAML setup
 - Allow admin users to login by using username/password
- **Pricefx Plasma**
 - If the partition has the "Plasma_Audit" CP table already, please truncate it before deploying the packages.
 - The user entitled to deploy packages to a particular partition in PlatformManager has to have all the available user roles in that partition
 - Deploy Plasma Transaction Processor Package and Plasma Quote Processor Package
 - Plasma Harvester Package is only deployed on the Plasma partition, not the client partition.
 - Plasma Harvester steps are sequenced with a combination of Plasma_Harvester_Sequencer logic, Plasma_Harvester_Sequencer_Reset CalculationFlow and Plasma_Harvester_SequenceControlTable PP table

- After the selected packages are deployed, the following configuration needs to be taken care of:
 - Plasma Transaction Processor Package Configuration
 - Plasma Quote Processor Package Configuration
 - Plasma Configuration Tables
 - Plasma General Configuration
 - Plasma KPI Dashboards Configuration
 - Plasma Deployment Troubleshooting
- Full documentation of Plasma deployment: [Plasma Deployment](#)
- **Product Master**
 - Product master must have the Id as the key
 - Product master will be in CSV format
 - Product master will be put into an agreed shared SFTP folder
- **Product Cost Data**
 - Create a Product Extension for the Product cost
 - Product cost will be in CSV format
 - Product cost will be put into an agreed shared SFTP folder
- **Product Unit of Measure**
 - Use system uom datasource for holding the Alternative Product UOM
 - The Product Unit of Measure table will have the product ID and the alternative UoM as the key
 - Product UOM will be in CSV format
 - Product UOM will be put into an agreed shared SFTP folder
- **Customer Master**
 - Customer master must have the Id as the key
 - Customer master will be in CSV format
 - Customer master will be put into an agreed shared SFTP folder
- **Transactional data / Invoice line items**
 - Create a datasource for Transactional data
 - Create a Datamart that uses the Transactional data source, Product Datasource, Customer Datasource
 - Transactional data will be in CSV format
 - Transactional data will be put into an agreed shared SFTP folder
- **Currency data**
 - Use system ccy Datasource for holding the currency
 - The ccy Datasource will contain daily exchanged rate
 - Currency will be in CSV format
 - Currency will be put into an agreed shared SFTP folder

Input Data

The following tables can be either manually loaded in Pfx via Pfx Excel Client or can be automatically integrated using CSV files in a Pfx dedicated SFTP folder:

- Price Waterfall data (typically based in invoice line items)
- Product Master
- Customer Master
- Product Cost data

- Currency data
- Unit of Measure

Out-of-scope business functions and features (Can be configured, but not included in the Chemical Industry Catalog)

- Any Reporting and Dashboards, other than the ones explicitly mentioned above
- Notifications and alerts
- API method integration
- Customer-Facing templates

Implementation Level of Effort

1.5 sprints/1FTE CE
 1 sprint/1FTE IE

Base Line Projected Annual Impact*

Direct Benefit = \$XK Per \$100M ARM
 Indirect Benefit = \$X Per \$100M ARM
 *Assumptions: Gross Margin % = 10%, Overhead = \$150K per annum

Prescribed User Stories

Use Story Name	I want to...	so I can ...	Acceptance criteria
Epic: roles and entitlements and SSO			
SSO	Have SSO setup	Log on seamless without having to enter my user/password	<ul style="list-style-type: none"> • Pricefx supports SSO using Azure Active Directory, ADFS, Okta and Salesforce • Users can access Pricefx without having to enter a userid/password
Business Roles	Several business roles available	Use these in workflows and steer the functionalities these user groups can access	<ul style="list-style-type: none"> • In the standard delivery we have the roles Account Exec, Sales Manager, Global Pricing Manager and Pricing Manager available. • These roles can be used to activate certain functionalities in the system. • These roles can be assigned to users
Epic: Inbound data			
Invoice line items	I need to have my invoice line items or transactional data	Use this data is several metrics	<p>Data to be loaded in Pfx Data Source table either manually through Pfx Excel Client, or automatically integrated via using CSV file placed on a Pfx dedicated SFTP folder on a pre-agreed frequency.</p> <p>Must have column definition: Unique transaction ID, Date, Customer-id, Document type, Product-id, quantity, all relevant waterfall elements like List price, all applicable discounts, all applicable surcharges, the invoice price, all rebates, the net price, the relevant cost elements, the final margin, the currency of the transaction.</p> <p>All ETL activities must be done outside Pricefx; the transactional data must be provided in a waterfall type format.</p>
Product Cost data	I want to store product cost data on product level in Pricefx	So I can use that to project margins	<p>Data to be loaded in Pfx Data Source table either manually through Pfx Excel Client, or automatically integrated via using CSV file placed on a Pfx dedicated SFTP folder on a pre-agreed frequency.</p> <p>Must have column definition: Date, Product-id, cost per unit, currency</p>
Product Master	I need to have my Product Master available	So I can use products in my reports, pricelists and agreements	<p>Data to be loaded in Pfx Data Source table either manually through Pfx Excel Client, or automatically integrated via using CSV file placed on a Pfx dedicated SFTP folder on a pre-agreed frequency.</p> <p>Must have column definition: Product ID, Description, Priceable product (Y/N), base unit of measure, relevant product attributes like business unit, product group, product line, sub product group, EAN, packaging type</p>

Unit of measure	I need to have alternative unit of measure for my products	So I can price them in different units of measure	Data to be loaded in Pfx Data Source table either manually through Pfx Excel Client, or automatically integrated via using CSV file placed on a Pfx dedicated SFTP folder on a pre-agreed frequency. Must have column definition: Product ID, Additional UoM, Conversion factor
Customer master	I need to have my customers in Pricefx	So I can use them in my agreements and analysis	Data to be loaded in Pfx Data Source table either manually through Pfx Excel Client, or automatically integrated via using CSV file placed on a Pfx dedicated SFTP folder on a pre-agreed frequency. Must have column definition: Customer ID, Customer Name, Account Group, Top level hierarchy, Top Level hierarchy name, Continent, Region, Country, Address, ZIP, City, State, Customer Classification, Customer Type, Industry, Customer Segment, Customer Currency, Sales Org, Salesperson, Payment terms, Customer Active (Y/N)
Currency data	I need to have my currency conversion rates in Pricefx	So I can do proper analysis on my data and set prices in the right currency	Data to be loaded in Pfx Data Source table either manually through Pfx Excel Client, or automatically integrated via using CSV file placed on a Pfx dedicated SFTP folder on a pre-agreed frequency. Must have column definition: valid-date, From-currency, to-currency, conversion rate
EPIC: Pricefx Plasma			
Transaction waterfall mapping	translate (map) my transactional data to the corresponding categories used in PricefxPlasma transaction waterfall	see my transactional data in standardized PricefxPlasma structure	Customer transaction data is mapped to the standardized PricefxPlasma structure in <i>Plasma_TransactionMapping</i> PP table
Quote Extractor mapping	translate (map) my quote data to the corresponding categories used in Plasma_Quotes Data Source	see my quoting data in standardized PricefxPlasma structure	Customer quoting data is mapped to the standardized PricefxPlasma structure in <i>QuotesDataExtractorMappingConfiguration</i> PP table
Executive Summary Dashboard	see Executive Summary Dashboards with predefined KPIs (as per PricefxPlasma documentation)	compare my performance with the provided benchmark and make pricing decisions	Customer can see the displayed KPI with benchmark and customer data. *The charts use either transactional or quote data. In case any of those are missing, Customer will still see the KPI with benchmark results for each chart but not the results representing Customer own data.
Plan Dashboard	see Plan Dashboards with predefined KPIs (as per PricefxPlasma documentation)	compare my transaction related performance with the provided benchmark and make pricing decisions	Customer can see the displayed KPI with benchmark and customer transactional data. *if Customer do not have transactional data, the KPI benchmark results will be still visible for this dashboard but without the result representing Customer own data.
Price Dashboard	see Price Dashboards with predefined KPIs (as per PricefxPlasma documentation)	compare my transaction related performance with the provided benchmark and make pricing decisions	Customer can see the displayed KPI with benchmark and customer transactional data. *if Customer do not have transactional data, the KPI benchmark results will be still visible for this dashboard but without the result representing Customer own data.
Profit Dashboard	see Profit Dashboards with predefined KPIs (as per PricefxPlasma documentation)	compare my quote performance with the provided benchmark and make pricing decisions	Customer can see the displayed KPI with benchmark and customer quote data. *if Customer do not have Quote Configurator and quote data, the KPI benchmark results will be still visible for this dashboard but without the result representing Customer own data.

Scope Validation and Project Readiness Workshop – Validation Questions:

Questions		Answers	
Q1	Do you have alternative units of measure for your products that you price?	A1	
Q2	For sales analysis, are there any regional attributes to consider when benchmarking prices? (e.g., sales region, channel)		
Q3	Is you the pricing relevant customer hierarchy more than two levels deep?	A3	
Q4	Can one customer id be present in multiple sales organization with different data like payment terms or currencies?	A4	
Q5	Waterfall setup; how should your pricing waterfall look like?	A5	
Q7		A6	
Q8		A7	
Q9		A8	
Q10		A9	
Q11		A10	
Q12		A11	
Q13		A12	
Q14		A13	
		A14	