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# Background

The current process for documenting co-marketing agreements is inconsistent and lacks standardization, with information scattered across various formats and no clear method for tracking execution and performance. This lack of transparency hinders the ability to assess return on investments (ROI), leading to inefficient budget allocation and suboptimal retailer negotiations. Focusing on co-marketing activities with spend greater than or equal to (>=) $250K - which represented 4.4% of total spend in 2024 and 2025 - the proposal suggests implementing a more structured approach to improve insight, accountability, and decision-making.

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| Related Documentation : [The Proposed Process - Part 1](https://docs.google.com/document/d/15WBGzHC-fsOTrjkqiLfvhQuaxA3zNlIgK2YmFz4A4Ng/edit?tab=t.0#heading=h.9h3dfaml9dqj) |
| Tasks: Config [T217577734](https://www.internalfb.com/intern/tasks/?t=217577734), Code [T217809046](https://www.internalfb.com/intern/tasks/?t=217809046) |
| Approvers: Eduardo Contreras |
| Business Sponsor/Stakeholders: Brandon Solberg |

# Problem

## Project Background:

The current process for documenting co-marketing agreements is inconsistent and lacks standardization, with information scattered across various formats and no clear method for tracking execution and performance. This lack of transparency hinders the ability to assess return on investments (ROI), leading to inefficient budget allocation and suboptimal retailer negotiations. Focusing on co-marketing activities with spend greater than or equal to (>=) $250K - which represented 4.4% of total spend in 2024 and 2025 - the proposal suggests implementing a more structured approach to improve insight, accountability, and decision-making.

## Problem Statement:

The current process for managing Proof of Performance in Material Co-Marketing Spend lacks a standardized way to document agreements and collect data, resulting in:

* Limited accountability
* Higher risk of errors and non-compliance
* Poor budget allocation decisions
* Insufficient data for analysis

Business Benefit/Impact:

Injecting structure and standardizing the process of documenting comarketing agreements between Meta and retailers will result in considerable business impact resulting in

* Improved accountability, accuracy and compliance
  + By providing a centralized location for storing agreements, the goal is to increase efficiency with real-time availability of information and enhanced accountability and compliance.
* Better budget allocation decisions and improved ROI
  + By making data driven decisions, the goal is to improve ROI and better performance throughputs
* Enhanced data analysis and improved visibility
  + The goal is to increase ROI by 5% for spend >= $250K in 2025. There is no current ROI measurement available.

## The Present Process:

Details of the present process are documented [here](https://docs.google.com/document/d/15WBGzHC-fsOTrjkqiLfvhQuaxA3zNlIgK2YmFz4A4Ng/edit?tab=t.0#heading=h.6nhlwdleuykg).

## The Proposed Process:

The proposed process is broken down into two parts:

1. Part 1 - Documentation and Process Standardization - H1 2025
2. Part 2 - Claims@ Integration Build - not in current scope

Part 1 - Documentation and Process Standardization.

1. CMM creates Co-Marketing header in Salesforce
2. When the header amount is >= $250K, a banner alert will appear to notify the CMM that the amount requested is >= $250K and that there is a documentation requirement before the header can be approved. A button will appear for CMM to download the agreement and to fill it out and attach the filled out agreement to the co-marketing record.
   1. The header can have more than one attachments
   2. Minimum one attachment
3. CMM must attach an agreement to the co-marketing header record before submitting it for approval.
   1. If the CMM submits a co-marketing header for approval without attaching a comarketing agreement, an error will appear: “Given your co-marketing amount is >=$250k, you must submit a retailer agreement for approval”
   2. Note: A standard agreement will be provided to all CMMs. This agreement letter will have a pick list to include the relevant information in their agreement form. A signature is not required from the retailer.
4. CMM must then check 2 check boxes, if the answer is “yes”
   1. Check box 1 should say: “Has the co-marketing agreement been shared with the retailer?” – Mandatory field to check for submission
      1. Note: this label is longer than the 40 character Salesforce limit so shorten this to ‘Agreement shared with Retailer’
   2. Check box 2 should say: “Were goals outlined in the agreement validated by the Demand Planning team?” – Optional field to check for submission
      1. Note: this label is longer than the 40 character Salesforce limit so shorten this to ‘Agreement validated by Demand Planning’

## Business Requirements:

*Critical - Must be in scope*

*High - Should be in scope*

*Medium - Nice to have*

*Low - Future functionality request*

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| --- | --- |
| Priority | Requirements Description |
| Critical | Agreements apply to co-marketing headers greater than or equal to $250k in reportable spend only (for fixed and accrual based co-marketing spend types). |
| Critical | Agreement must be attached on the co-marketing header in order for it to be submitted for approval. Many attachments are to be allowed but only 1 needed for submission. |
| High | Standardized agreement letter used for each retailer. This agreement letter is a template with a pick list for CMMs to edit as they see fit. This template will be available for download in SFDC. |
| Critical | Applies to all accounts. |
| Critical | If a CMM tries to submit a header for approval and does not attach an agreement, an error message appears, “Given your co-marketing amount is >=$250k, you must submit a retailer agreement for approval.” |
| High | Check box 1 available: “Has the co-marketing agreement been shared with the retailer?” (mandatory field to check for submission) |
| High | Check box 2 available: “Were goals validated by the Demand Planning team?” (optional field to check for submission) |

#### 

#### Functional Design and Requirements:

Overview:

1. Provide a warning and call to action when a header amount is greater than or equal to $250K and there is no attachment detected. The call to action is to download the agreement and fill out the information before re-attaching it back to the co-marketing record.
2. Provide a means for CMM to download the retailer agreement template
3. Provide a means for CMM to attack the filled-out agreement to the co-marketing header record
4. Detect that an agreement has been attached

## Assumptions

1. Assume that if a document is detected as attached to the co-marketing header record, that it is the right document. No verification of document content is required.
2. The Agreement letter and its contents will be furnished by business.
3. The Agreement letter will be housed in Salesforce as a content file with a public link.

**Goals**

|  |  |  |
| --- | --- | --- |
| Req # | Priority | Details |
| 1 | Critical | Agreements apply to co-marketing headers greater than or equal to $250k in reportable spend [field:Roll-up - Amount (Requested Summary] only (for fixed and accrual based co-marketing spend types). |
| 2 | Critical | Agreement must be attached on the co-marketing header in order for it to be submitted for approval. Many attachments are to be allowed but only 1 needed for submission. |
| 3 | High | Standardized agreement letter used for each retailer. This agreement letter is a template with a pick list for CMMs to edit as they see fit. This template will be available for download in SFDC. |
| 4 | Critical | Applies to all accounts. |
| 5 | Critical | If a CMM tries to submit a header for approval and does not attach an agreement, an error message appears, “Given your co-marketing amount is >=$250k, you must submit a retailer agreement for approval.” |
| 6 | High | Check box 1 available: “Has the co-marketing agreement been shared with the retailer?” (mandatory field to check for submission) |
| 7 | High | Check box 2 available: “Were goals validated by the Demand Planning team?” (optional field to check for submission) |

### 

Technical Solution Design

Instead of using a validation rule and enforce the gates after the CMM submits the co-marketing record for approval, be proactive and use a banner text to guide the CMM on the pre-requisite steps to be met before being able to submit the record for approval. This approach is more proactive instead of stopping the user on the tracks and back-tracking.

Use banner text to guide the user to complete the pre-requisite steps. Once the pre-requisite steps are met, display the Submit for Approval button.

**Goal 1: Critical**

1. Display Text - guide pre-requisite steps
2. Submit for Approval

**Display Text - guide pre-requisite steps**

For any co-marketing record header with amounts >= 250K, in draft mode, and no attachment has been detected, display an alert and call to action message for the CMM to download the retailer agreement, fill it out and re-attachment it to the co-marketing record before submitting it for approval.

Banner1 (Rich Text field):

Rich Text Content:

“Your requested amount is greater than $250K. Before you can submit the header for approval, you must first carry out the following steps. Once you have carried out the required pre-approval steps, the [Submit for Approval] button will appear”

1. Download the retailer agreement by clicking on the [Download POP] button
2. Fill it out fully
3. Share it with the Retailer
4. Have demand planning team review it
5. Check the [Agreement shared to Retailer] checkbox
6. Attach the agreement back to the header record
7. Check the [Document reviewed by Demand Planning] checkbox (optional)

**Visibility filter:**

1. PopSetVisible = true

Create custom fields

1. Has\_Attachment\_\_c (boolean, default value is false)
   1. Code is needed here to detect the presence of a file attachment.
   2. Code will query a system object called ContentLinkEntity for any link entity ID that starts with the object code for co-marketing records ‘aMw’.
   3. If there is one, Has\_attachement\_\_c field will be set to true
   4. Here is the task with detail specifications [T217809046](https://www.internalfb.com/intern/tasks/?t=217809046)
2. Code to detect when a file is attached to the co-marketing record and sset Has\_Attachment\_\_c to true.
3. Agreement\_shared\_with\_Retailer\_\_c (Type: checkbox, default: unchecked)
4. Goals\_Reviewed\_by\_Demand\_Planning\_\_c (Type: checkbox, default: unchecked)
5. PopSetVisible\_\_c (Type: formula

Formula : AND(TEXT( Status\_\_c) = 'Draft',

Roll\_up\_Amount\_Requested\_Summary\_\_c >= 250000,

OR (Has\_Attachment\_\_c = false,

Agreement\_Shared\_with\_Retailer\_\_c = false)

)

**Submit for Approval button**

1. Set visibility filters
   1. RecordType.Name = ‘Header’
   2. Status\_\_c = ‘Draft’’
   3. PopSetVisible = false
   4. Roll\_up\_Amount\_Requested\_Summary\_\_c < 250000
   5. Roll\_up\_Amount\_Requested\_Summary\_\_c >= 250000
2. Filter Logic : a and b and c and (d or e)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Co-Marketing Header (Comarketing\_\_c) | | | | |
| Label | API Name | Type | Editable | UI |
| Has Attachment | Has\_Attachment\_\_c | checkbox | Y | No |
| Agreement shared with Retailer | Agreement\_shared\_with\_Retailer | checkbox | Y | Yes |
| Document reviewed by Demand Planning | Document\_reviewed\_by\_Demand\_Planning\_\_c | checkbox | Y | Yes |

**Goal 2: Critical**

Agreement must be attached on the co-marketing header in order for it to be submitted for approval. Many attachments are to be allowed but only 1 needed for submission.

The implementation under Goal 1 covers this requirement using visibility setting on the ‘Submit for Approval’ button and using the banner alert display to guide the user on pre-requisite steps.

**Goal 3: High**

Standardized agreement letter used for each retailer. This agreement letter is a template with a pick list for CMMs to edit as they see fit. This template will be available for download in SFDC.

Create an upload button and attach the link to the upload button:

https://fb--sfull.sandbox.my.salesforce.com/sfc/p/DO0000000RsU/a/DO000000GrMv/n5PhuDsKbReeb1oTUFTauDnuqAyZvjziF7OUBycVe48

Add button to page layout

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Co-marketing (Comarketing\_\_c) | | | | |
| Button Label | API Name | Type | URL | UI |
| Download POP | Download\_POP | Detail Page Button | /sfc/p/DO0000000RsU/a/DO000000GrMv/n5PhuDsKbReeb1oTUFTauDnuqAyZvjziF7OUBycVe48 | Y |

**Goal 4: Critical**

Must apply to all accounts.

**Goal 5: Critical**

Do not allow CMM to submit for approval unless there is a file attachment detected (has\_attachment\_\_c = true).

Because we are using the banner message approach, the submit for approval button will not be visible until all criteria are satisfied including the detection of the presence of a file attachment and the field Has\_Attachment\_\_c set to true.

**Goal 6: High**

Display a checkbox field, [Agreement shared with Retailer], for the user to check to indicate that an agreement has been attached to the co-marketing record.

**Goal 7: High**

Display a checkbox field, [Goals validated by Demand Planning], for the user to optionally check to indicate that goals have been validated by the demand planning team.

## Scalability

<Optional: Discuss potential scalability bottlenecks (resource contention on I/O, CPU, memory, network requests, ...).>

# Scratchpad

<https://lucid.app/lucidspark/ef963827-7fa3-41fb-a1a5-a43c3da500ef/edit?viewport_loc=-1646%2C-793%2C2003%2C1015%2C0_0&invitationId=inv_ba59375e-b9ea-4847-a4c7-87e523e58d8f>

# Document History and Sign-Off

Captures all updates and signoffs to the document. Please add your name here whenever you make changes or review the document and describe the changes and what you have reviewed. *Note: see* [*https://fburl.com/devenv-reading-and-engaging-documents*](https://fburl.com/devenv-reading-and-engaging-documents) *for details on how to leave comments and sign documents.*

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| **Name** | **Date** | **R** / **W** | **Description** |
| Agnes Leslie | Apr 1, 2025 | **W** | Created document |
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