

CPO 101

The complete guide to getting started with CPO, or Configure, Price, Quote, the Salesforce tool for companies to price their products in an assortment of configurations.

Provided by

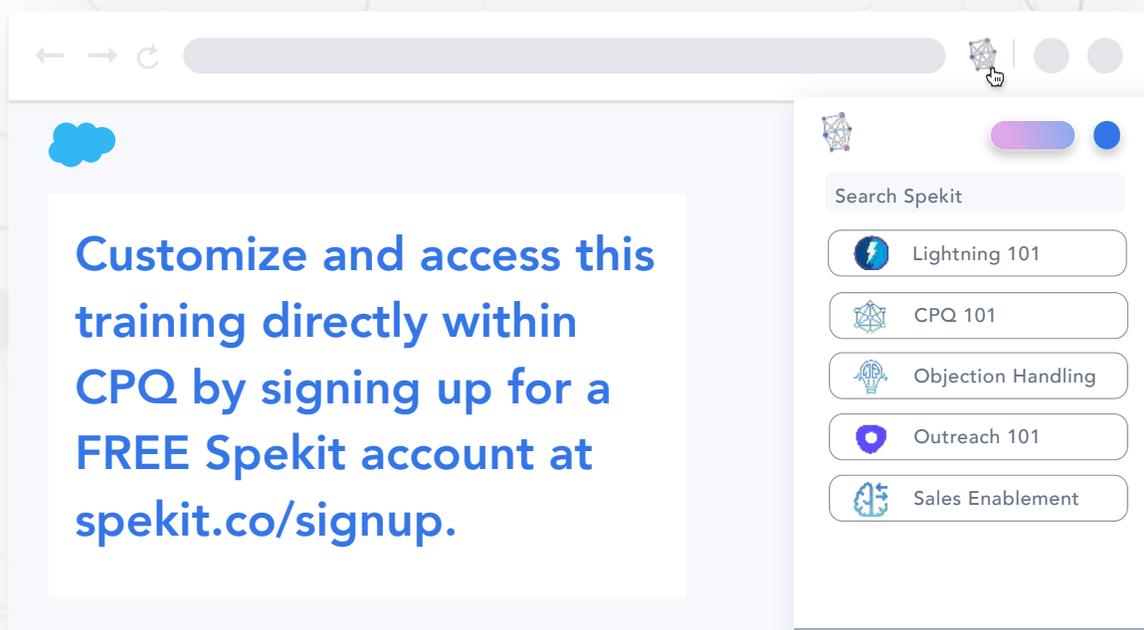


Table of Contents - CPQ 101

- 01. Table of Contents - CPQ 101
- 02. CPQ Object and Term Glossary
- 03. About - Quote Line Editor
 - 03.1. How to edit a Quote on an Opportunity
 - 03.2. Quote Line Groups
 - 03.3. Create Quote Line Groups
 - 03.4. How to Edit Lines on a Quote
 - 03.5. How to create and manage Quotes
 - 03.6. Guidelines for Cloning Quote Lines
 - 03.7. How to locate a Primary Quote
 - 03.8. Quote Calculator and Calculate button
- 04. How to create a new Contract
 - 04.1. How to create a Contract from an Order
 - 04.2. How to amend from a Contract
 - 04.3. How to amend an Account
 - 04.4. How Start/End dates work
 - 04.5. End date vs. Subscription Term
 - 04.6. About - Contracted Price Fields
 - 04.7. About - Discount Schedules
 - 04.8. About - Discount Tiers
- 05. How to add a Product to an Opportunity
 - 05.1. How to use filters to find the Product
 - 05.2. Product keyword search
 - 05.3. About - Configurator
- 06. CPQ Favorites
 - 06.1. Problem with your CPQ instance?
 - 06.2. Quote Line Editor icons
 - 06.3. Quick Save
 - 06.4. About - Advanced Approvals
 - 06.5. Block Prices and Slab Discount Schedules

02. CPQ Object and Term Glossary

Batch Quantity

This feature allows you to price products component or accessory product options by lots or bunches, such as \$10 for every 32 units. Batch pricing recalculates the quantity you enter by a divisor you assign to a product. Salesforce CPQ divides the product option's quantity by its batch quantity and uses that value for the resulting quote line's quantity. For example, a \$500 App License product option has a batch quantity of 4, and your sales rep enters a quantity of 8 for that product option in the configurator. The resulting quote line has a quantity of 2 and a net total of \$1000.

Block Price

Allows you to assign a fixed price to a product based on quantity, overriding the automatic calculation of quantity * unit price.

Configuration Attribute

Help guide the configuration when tied to product rules. For example, they can allow a user to specify the number of students of a training product. They can be associated to features and be specified where they are displayed so there can be different sets of Configuration Attributes within each feature. Configuration attributes are mapped to fields on the product option object and can be mapped to the quote Line object. They can be used to enter information on the quote line specific to certain products or used to drive Product Selection rules.

Contracted Prices

Prices that you have negotiated with specific customers and should be automatically applied to all quotes for that customer. They are available on the account and can be applied to any product in any price book. Contracted prices can be constrained to a specific time period.

Co-Terminated Subscriptions

Users can add subscription products to an active contract. Salesforce CPQ automatically prorates prices to co-terminate the subscription with the contract. Users are presented with a prompt at the time of quote creation if the account has an active contract eligible for co-termination.

Customer Price

Price of the product after applying discretionary discount. It is calculated as regular price - additional discount.

Distributor Discount

This is a discount that is applied to partner price and reflected in the net price.

Guided Selling

Create a set of questions to prompt users to narrow down the number available to select from based on their responses. Users can quickly find the products they're looking for even if you have a large catalog. You can also display different prompts for the rep for different groups of

products. This is useful if you have two different product lines on a single quote and you want a different guided selling process invoked for these product lines based on the quote line group.

Line Column

Record that allows an administrator to define a specific quote line field to be displayed in one or multiple line items template sections.

List Price

Salesforce CPQ handles list prices like Salesforce product pricing on opportunities. Each quote line has a list price that originated in the price book.

Markup Price

Salesforce CPQ can determine price by the product cost plus a markup amount. The calculated value is stored in the regular price.

Merge Fields

Salesforce CPQ quote Templates allow you to create mail-merge documents that dynamically populate your quote. Merge Fields allow you to set up placeholders for this data in your template content or dynamic quote terms, and generate a PDF Document using the layout in your quote Template.

Option Constraints

Constraints placed on products defined in the Options Related List. They control which options may or may not be purchased together. Option Constraints are used to set up option dependencies and exclusions; they can be applied to real-time rule processing, which gives immediate feedback to the sales rep.

Partner Discount

If your organization sells through a channel/VAR, you can give a “partner discount” on quote or the individual product line item on the quote. By default, partner discounts are applied after all automatic and discretionary discounts. Salesforce CPQ applies the partner discount to the price and stores the result in the Partner Price.

Price Rules

Price rules set individual fields or a combination of fields within the Edit Lines screen. A flexible way of automating price calculations and updating quote line fields. Set price rules to automatically discount quote line items based on product or quote attributes. You can set as many conditions as you like and specify whether one or all conditions should be met to trigger the resulting actions. In this case, each price rule must have at least one condition and one action, allowing you to deliver the desired discount when your conditions are met. You can also specify the order in which multiple price rules should be evaluated.

Product

Anything that can be identified as an individual line item on the quote. Core product offerings that the customer sells are products. Ancillary products, options, accessories, add-ons, spares,

or other forms of supplementary products are also products. Any product, component, accessory, or part that could possibly be a quote line or an option in a bundle, needs to be added as a product record in Salesforce.

Product Configuration Rules

Configuration rules tie a product rule to one or several product bundles.

Product Features

Categories or groups of product options within a bundle. Product options of the same feature may have several constraints, such as “pick one or more” and “pick 2 of 5.”

Product Options

Components of a bundle that are also products and could contribute to the bundle price. Product options can be associated with features; how the different components behave in relation to configuration, pricing, and constraints can also be configured.

Product Rules

Checks the quote line items and verifies that there are no invalid product combinations at the line editor level. The number of active quote product rules affects performance of the Edit Lines screen and should be limited to avoid Salesforce governor limits.