

**APT*TUS***

CPQ Quick Start

Apttus for Apttus Business Requirements

Configure Price Quote (CPQ)   
and   
Asset Based Ordering (ABO)

12/2/2016

**Document Control**

**Change Record**

| Date | Author | Version | Change Reference |
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|  | | | |
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Reviewers

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Approval

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Index

[Purpose 4](#_Toc468700990)

[Project Summary 5](#_Toc468700991)

[Assumptions 5](#_Toc468700992)

[Out of Scope 5](#_Toc468700993)

[CPQ - Requirements 6](#_Toc468700994)

[Quote 6](#_Toc468700995)

[Product Structure 9](#_Toc468700996)

[Bundle Structure 10](#_Toc468700997)

[Product Categories 11](#_Toc468700998)

[Constraint Rules 12](#_Toc468700999)

[Pricing 12](#_Toc468701000)

[Approval Workflow - Requirements 13](#_Toc468701001)

[Workflow 13](#_Toc468701002)

[[Flow chart or Diagram optional] 13](#_Toc468701003)

[ABO - Requirements 14](#_Toc468701004)

[Amendment 14](#_Toc468701005)

[Renewals 14](#_Toc468701006)

[Termination 14](#_Toc468701007)

[Swap 15](#_Toc468701008)

[Data Migration Requirements 16](#_Toc468701009)

[Assumptions and Exclusions 16](#_Toc468701010)

[Integration Requirements 17](#_Toc468701011)

[Assumptions and Exclusions 17](#_Toc468701012)

[Open and Closed Items 18](#_Toc468701013)

[Open Items 18](#_Toc468701014)

[Closed Items 18](#_Toc468701015)

[Appendix A—Terms and Definitions 19](#_Toc468701016)

[Appendix B—Quote Templates 23](#_Toc468701017)

[Appendix C- Calculations 24](#_Toc468701018)

[Appendix D - Initial list of Attributes 25](#_Toc468701019)

# Purpose

The Requirements document forms the foundation for the Solution Design document. This document will be used to specify the business use cases for the Apttus Quick Start configuration.

# Project Summary

Apttus has developed a Quick Start program to be used by Apttus new hires. The program is intended to provide actual hands-on experience with the Apttus CQP solution, using real-world use cases.

## Assumptions

|  |  |
| --- | --- |
| **No.** | **Description** |
| 1 | All functionalities configured in the system will use standard Apttus and Salesforce Product functions. |
| 2 | Searching, reporting & dashboards will use standard Salesforce capability. |
| 3 | Products and Pricing will be based on Apttus internal product catalog |

## Out of Scope

|  |  |
| --- | --- |
| **No.** | **Description** |
| 1 | e-Signature |
| 2 |  |

# CPQ - Requirements

## Quote

| **Req. ID** | **Category** | **Requirement Title** | **Requirement** | **Priority** | **Actors** | **Comments (optional)** |
| --- | --- | --- | --- | --- | --- | --- |
| **CPQ-01** | Quote | Quote creation | Ability to create Quote(s) from an existing Opportunity. All relevant fields such as Account, Primary Contact, should carry over to the Quote from the Opportunity | High | Sales, Finance, Legal, System |  |
| **CPQ-02** | Quote | Quote Types | Ability to define and setup pricing in USD,EUR and GBP currencies | High | System |  |
| **CPQ-03** | Quote | Deal Maximizer Ratings and Recommendations is not available for Microsoft platform in Enterprise CPQ | Ability to prevent Deal Maximizer Ratings and Recommendations for Enterprise CPQ when Microsoft is the platform. |  | Sales |  |
| **CPQ-04** | Quote | Auto Include PS with Ultimate CPQ | Ability to automatically include Professional Services, when purchasing Ultimate CPQ, when the account Industry is "Technology" and the account has >$2 Billion in Revenue. |  | Sales |  |
| **CPQ-05** | Quote | E-Commerce Product can only be added once to cart. | Ability to limit the number of E-Commerce Products added to the cart, to one E-Commerce. The quantity of E-Commerce can be greater than 1. |  | Sales |  |
| **CPQ-06** | Quote | When selecting Ultimate CPQ, set and hide the attributes for the sub-products. | Ability to automatically set an attribute at a sub-product level that is the same as the parent bundle and do not display the sub-product's attribute in the cart. Ex. If buying Ultimate CPQ, then automatically select the salesforce attribute for the Enterprise CPQ and automatically include required options. |  | Sales |  |
| **CPQ-07** | Quote | Hide picklist values based on user's profile. | Ability to customize which pick list values a user will see in the attribute and Adjustment Type fields based on the user's Profile. The sales user should only see a subset of the picklist values. |  | Sales |  |
| **CPQ-08** | Quote | Ultimate CPQ Professional Services Platform Attribute should agree with the Platform selected for Ultimate CPQ. | Ability to automatically change the Professional Services platform attribute to agree with the Ultimate CPQ platform attribute when Professional Services are added to the cart with Ultimate CPQ. Ultimate CPQ Professional Services should be recommended if the Account industry is "Technology" and the Account revenue is >$2B. |  | Sales |  |
| **CPQ-09** | Quote | For Enterprise type of accounts, Sprint CPQ should not be listed in the catalog. | Ability to prevent "Sprint CPQ" from appearing in the catalog if the account is an Enterprise type account. |  | Sales |  |
| **CPQ-10** | Quote | Enterprise type of industry will get discount of 10% on all products | Ability automatically provide a 10% discount to Enterprise accounts. |  | Sales |  |
| **CPQ-11** | Quote | Add $10/unit more to any Microsoft platform. | Ability to automatically mark-up any Microsoft specific product by $10 per unit. |  | Sales |  |
| **CPQ-12** | Quote | Include Implementation fee if "Technology" customer is buying Ultimate CPQ for Microsoft platform. | Ability to include an implementation fee if a "Technology" customer is buying Ultimate CPQ for Microsoft platform. |  | Sales |  |
| **CPQ-13** | Quote | Quantity based discount on "Ultimate CPQ" product. | Ability to set Ultimate CPQ discount based on quantity ordered. If Quantity <= 5, then no discount If Quantity is between 6 and 10, then provide a 10% discount If Quantity is between 11 and 15, then provide a 20% discount If Quantity is between 16 and 20, then provide a 30% discount If Quantity is greater than 20, then provide a 40% discount |  | Sales |  |
| **CPQ-14** | Quote | Auto include price book (Standard Price Book) when opptunity is 75% or more. | Ability to automatically set the opportunity's Price Book to "Standard Price Book" when the Opportunity probability is 75% or greater. |  | Sales |  |
| **CPQ-15** | Quote | Accounts in EMEA should use EMEA Price List. | Ability to automatically set a quote's Price List to the "EMEA Price List" if the account is in EMEA region. The "EMEA Price List" should be based on the "USA Price List" with a $20 markup). |  | Sales |  |
| **CPQ-16** | Quote | Ensure Quote Account is populated. | Ability to automatically update a Quote's Account to the Opportunity Account when user does not provide the Account on the Quote. |  | Sales |  |
| **CPQ-17** | Quote | Compare customer sat for different product choices while in the cart. Include ability to filter within cart based on the field value. | Ability to compare products in my cart based on a custom field (Ex: # of Happy Customers). While in the cart, I want to be able to filter the available products by this field. |  | Sales |  |
| **CPQ-18** | Quote | Display the Account's location on the cart page. | Ability to display the Account's location on the cart page. This should not be editable by the user. |  | Sales |  |
| **CPQ-19** | Quote | Sort catelog by other fields. | Ability to sort products on the cart catalog page by fields other than Product Name. |  | Sales |  |
| **CPQ-20** | Quote | Associate multiple features to a product. | Ability to define one or more sets of features to a product. |  | Admin |  |
| **CPQ-21** | Quote | Show Attributes on cart page. | Ability to show selected attributes on the cart page. |  | Sales, Admin |  |
| **CPQ-22** | Quote | Use enhanced CSS for cart and catalog pages. | Ability to customize the look and feel of the cart and catalog pages. |  | Admin |  |
| **CPQ-23** | Quote | Docusign Integration | Ability to add E-signature button on Quote's Action page. |  | Admin |  |
| **CPQ-24** | Quote | Provide "Proposal" as a value for template "Agreement Types" | Ability to select "Proposal" from the template "Agreement Type" field. |  | Sales |  |
| **CPQ-25** | Quote | Manually adjust a bundle's options. | Ability to manually adjust a bundle's options. |  | Admin |  |
| **CPQ-26** | Quote | Recommend appropriate support product. | Ability to recommend a support package (either Standard Premium or Premium Plus). |  | Sales, Service |  |
| **CPQ-27** | Quote | Apply premium discount for Channel Distributors who are a Premium Channel Distributor. | Ability to automatically set a Premium Discount rate on quotes where the Type of Account is "Channel Distributor" and the account is a "Premium Channel distributor" as selected in Channel Discount VF page on account otherwise apply "Standard Discount Rate" on Line Item's List Price. |  | Sales |  |
| **CPQ-28** | Quote | Show Actual Bundle Discount on Cart (On each LI) | Ability to display the actual discount, including options, at the bundle level. Currently, if we provide adjustment on options then it will not get counted in "Net Adjustment %", so business would like to see the actual discount including options on bundle level. |  | Sales |  |
| **CPQ-29** | Quote | Maintain two products quantity same on cart and Asset | Ability to validate that the quantity of an add-on is the same as the base product's quantity. These quantities should apply in both the cart and the resulting asset. In our case the base product is "Sprint CPQ " and Add-on Product is "X-Author". |  | Sales |  |
| **CPQ-30** | Quote | If base product exists as an asset then only allow Add-on product to be purchased. | Ability to prevent an existing asset, if it has add-on options, from being ordered again. Only add-on options may be purchased. |  | Sales |  |
| **CPQ-31** | Quote | Discount on some specific product when people buy any another product with it. | Ability to specify a product discount when customers buy any other product at same time. |  | Sales |  |
| **CPQ-32** | Quote | Automatically reprice a cart if additional products added result in a new discount level. | Ability to have cart automatically reprice if adding additional products changes the discount level. |  | Sales |  |

## Product Structure

| **Req. ID** | **Product Name** | **Product Code** | **Product Description** | **Config Type** | **Product Family** |
| --- | --- | --- | --- | --- | --- |
| CPQ-33 | Apttus Intelligent Cloud | APT\_QTC\_001 |  | Standalone | QTC |
| CPQ-34 | E-Commerce | APT\_QTC\_002 |  | Standalone | QTC |
| CPQ-35 | Sprint CPQ | APT\_CPQ\_001 |  | Fixed Bundle | CPQ |
| CPQ-36 | Enterprise CPQ | APT\_CPQ\_002 |  | Variable Bundle | CPQ |
| CPQ-37 | Ultimate CPQ | APT\_CPQ\_003 |  | Variable Bundle | CPQ |
| CPQ-38 | Sprint CLM | APT\_CLM\_001 |  | Fixed Bundle | CLM |
| CPQ-39 | Enterprise CLM | APT\_CLM\_002 |  | Fixed Bundle | CLM |
| CPQ-40 | Ultimate CLM | APT\_CLM\_003 |  | Fixed Bundle | CLM |
| CPQ-41 | Order Management | APT\_REV\_001 |  | Standalone | REV |
| CPQ-42 | Billing Management | APT\_REV\_002 |  | Standalone | REV |
| CPQ-43 | Revenue Recognition | APT\_REV\_003 |  | Standalone | REV |
| CPQ-44 | Incentives | APT\_REV\_004 |  | Standalone | REV |
| CPQ-45 | Rebate Management | APT\_REV\_005 |  | Standalone | REV |
| CPQ-46 | Source to pay | APT\_STP\_001 |  | Standalone | STP |
| CPQ-47 | X-Author | APT\_XA\_001 |  | Standalone | XA |
| CPQ-48 | IWA | APT\_IWA\_001 |  | Standalone | IWA |
| CPQ-49 | Standard Support | APT\_TSP\_001 |  | Standalone | TSP |
| CPQ-50 | Premium Support | APT\_TSP\_002 |  | Standalone | TSP |
| CPQ-51 | Premium Plus Support | APT\_TSP\_003 |  | Standalone | TSP |
| CPQ-52 | Professional Services | APT\_PS\_001 |  | Standalone | PS |
| CPQ-53 | CPQ | APT\_CPQ\_000 |  | Standalone | CPQ |
| CPQ-54 | CLM | APT\_CLM\_000 |  | Standalone | CLM |

## Bundle Structure

| **Req. ID** | **Bundle** | **Bundle Code** | **Option Group** | **Option** | **Required?** | **Additional Cost?** |
| --- | --- | --- | --- | --- | --- | --- |
| CPQ-55 | Sprint CPQ (Fixed Bundle) | APT\_CPQ\_001 | Sprint CPQ Option Group | Deal Management |  |  |
|  |  |  | add prices for each option | Advanced Pricing |  |  |
|  |  |  |  | X-Author for CPQ |  |  |
|  |  |  | "Not in bundle" = option price added to total. "In bundle" no additional $ | Electronic Signature |  |  |
|  |  |  |  | CPQ |  |  |
| CPQ-56 | Enterprise CPQ (Variable Bundle) | APT\_CPQ\_002 | Enterprise CPQ Option Group | Sprint CPQ (Bundle) |  |  |
|  |  |  |  | Guided Selling |  |  |
|  |  |  |  | Asset based Ordering (ABO) |  |  |
|  |  |  |  | Deal Maximizer Ratings and Recommendations | No | Yes |
|  |  |  |  | Intelligent Workflow Approvals (P) | No | Yes |
|  |  |  |  | Premier Customer Support (P) | No | Yes |
| CPQ-57 | Ultimate CPQ (Variable Bundle) | APT\_CPQ\_003 | Ultimate CPQ Option Group | Enterprise CPQ (Bundle) |  |  |
|  |  |  |  | Visual Configuration (CPQ Admin Console) |  |  |
|  |  |  |  | Renewals Management |  |  |
|  |  |  |  | Intelligent CPQ | No | Yes |
|  |  |  |  | Deal Maximizer Ratings and Recommendations |  |  |

## Product Categories

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Req. ID** | **Level 1 Name (Category)** | **Level 2 Name (Sub Category)** | **Product Name** | **Product Code** | **Product Type** |
| CPQ-58 | Quote to cash | Core products | Apttus Intelligent Cloud | APT\_QTC\_001 | Standalone |
| CPQ-58 | Quote to cash | Core products | E-Commerce | APT\_QTC\_002 | Standalone |
| CPQ-58 | Quote to cash | CPQ | Sprint CPQ | APT\_CPQ\_001 | Fixed Bundle |
| CPQ-58 | Quote to cash | CPQ | Enterprise CPQ | APT\_CPQ\_002 | Variable Bundle |
| CPQ-58 | Quote to cash | CPQ | Ultimate CPQ | APT\_CPQ\_003 | Variable Bundle |
| CPQ-58 | Quote to cash | CLM | Sprint CLM | APT\_CLM\_001 | Fixed Bundle |
| CPQ-58 | Quote to cash | CLM | Enterprise CLM | APT\_CLM\_002 | Fixed Bundle |
| CPQ-58 | Quote to cash | CLM | Ultimate CLM | APT\_CLM\_003 | Fixed Bundle |
| CPQ-58 | Quote to cash | Revenue Management | Order Management | APT\_REV\_001 | Standalone |
| CPQ-58 | Quote to cash | Revenue Management | Billing Management | APT\_REV\_002 | Standalone |
| CPQ-58 | Quote to cash | Revenue Management | Revenue Recognition | APT\_REV\_003 | Standalone |
| CPQ-58 | Quote to cash | Revenue Management | Incentives | APT\_REV\_004 | Standalone |
| CPQ-58 | Quote to cash | Revenue Management | Rebate Management | APT\_REV\_005 | Standalone |
| CPQ-58 | Source to pay |  | Source to pay | APT\_STP\_001 | Standalone |
| CPQ-58 | Advanced Solution |  | X-Author | APT\_XA\_001 | Standalone |
| CPQ-58 | Advanced Solution |  | IWA | APT\_IWA\_001 | Standalone |
| CPQ-58 | Support |  | Standard Support | APT\_TSP\_001 | Standalone |
| CPQ-58 | Support |  | Premium Support | APT\_TSP\_002 | Standalone |
| CPQ-58 | Support |  | Premium Plus Support | APT\_TSP\_003 | Standalone |
| CPQ-58 | Professional Services |  | Professional Services |  |  |

## Constraint Rules

| **Req. ID** | **Constraint Rule Name** | **Description** | **Is Bundle Context** |
| --- | --- | --- | --- |
| CPQ-59 | Deal Maximizer Ratings and Recommendations is not available for Microsoft | Deal Maximizer Ratings and Recommendations is not available for Microsoft platform in enterprise CPQ bundle |  |
| CPQ-60 | IF Product Matched in Asset then only you can add Add on | IF Product Matched in Asset then only you can add Add on |  |
| CPQ-61 | Only one E-Comm Can be added | E-Comm only one time you can add (1 quantity only) |  |
| CPQ-62 | Order Management ABO Swap With Revenue Management | Order Management ABO Swap With Revenue Management |  |
| CPQ-63 | Sprint, Enterprise and Ultimate CPQ | Only one from Sprint, Enterprise and Ultimate CPQ |  |
| CPQ-64 | Technology + 2 Billion Account Bought Ultimate CPQ then Auto Include PS Product | Technology + 2 Billion Account Bought Ultimate CPQ then Auto Include PS Product | Yes |
| CPQ-65 | Upgrade CPQ |  |  |

## Pricing

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
| CPQ-00# | Pricing | Price List |  |  |  |  |
|  | Pricing | Price Drivers |  |  |  |  |
|  | Pricing | Price Discounts |  |  |  |  |
|  | Pricing | Net price adjustment |  |  |  |  |
|  | Pricing | Multi-Currency | Ability to support USD, GBP and EUR price lists. |  | Sales, Finance |  |
|  |  |  |  |  |  |  |

# Approval Workflow - Requirements

## Workflow

## [Flow chart or Diagram optional]

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
| IWA-01 | Approvals | If more than 10% discount given on cart then make Approvals required | Ability to require approvals if sales offers more than a 10% discount. |  | Deal Desk, RVP Sales |  |

# ABO - Requirements

## Amendment

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
| ABO-01 | Amendment | Amend subscription | Ability to change an existing order so that additional quantity may be purchased. For example; Linkiedin Account bought 100 Enterprise CPQ for 2 years. Then after 6 months they want to buy another 50. |  | Sales |  |

## Renewals

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
| ABO-02 | Renewal | Renew subscription | Ability to automatically create an order based on an account's assets. |  | Sales |  |
| ABO-03 | Renewal | Renew subscription | Ability to renew an expiring subscription. For example; TrustWave Account bought 100 Enterprise CPQ for 1 year. Then they want to renew it for another year |  | Sales |  |

## Termination

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
| ABO-04 | Termination | Terminate subscription | Ability to cancel (terminate) an existing subscription. For example; Acme Account bought 100 Enterprise CPQ for 1 year. Then after 4 months they want to terminate. |  | Sales |  |

## Swap

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
| ABO-05 | Swap | Upgrade subscription | Ability to upgrade an existing subscription. For example; Dream Force Account bought 100 Sprint CPQ for 1 year. Then after 4 months they want to upgrade it to Enterprise CPQ. |  | Sales |  |

# Data Migration Requirements

Following requirements define the legacy Quote and Asset data migration into Apttus.

## Assumptions and Exclusions

*[Build in assumptions / exclusions as needed]*

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
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# Integration Requirements

Following requirements define various interfaces and systems integrations required for this project.

## Assumptions and Exclusions

*[Build in assumptions / exclusions as needed]*

| Req. ID | Category | Requirement Title | Requirement Detail | Priority | Actors | Comments (optional) |
| --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |
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**Data Migration and Integration Requirements**

**Following are requirements for the Quote and Asset data migration.**

# Open and Closed Items

## Open Items

Record open items related to this Requirements Document for this specific release.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ID** | **Description** | **Business Impact** | **Priority** | **Owner** |
|  |  |  |  |  |
|  |  |  |  |  |

## Closed Items

Record closed items related to this Requirements Document for this specific release.

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Description** | **Resolution** | **Date Closed** |
|  |  |  |  |
|  |  |  |  |

# Appendix A—Terms and Definitions

| **Terms** | **Definitions** |
| --- | --- |
| Account | An organization, company, or consumer that is tracked in salesforce.com |
| Actor | A user of the Apttus CPQ solution that is assigned a specific set of responsibilities and functions in the solution |
| Base Price | The Quote Line Item price that is systematically computed by the Apttus solution as: [Base Price] = [List Price] +/- [Price Adjustments via Price Rules] |
| Bundles | Bundles are sets of Products that can be purchased together for a percentage discount, with some limited control over how its Products can be configured. |
| Charge | A Quote Line Item that apply ad-hoc fees Quotes, e.g. Sales Tax, Shipping & Handling, that are not applied via the Product Catalog |
| Charge Type | This defines the price calculation method for a product SKU.  Some of the Charge Types can be:   1. Flat Fee 2. Standard License |
| Conditional Price Rule | A logical mechanism composed of two parts: 1.) configurations that inspect quoting scenarios to determine the applicability of the associated Price Adjustment 2.) configurations that control the scope and extent of the Price Adjustment |
| Configuration Option | An optional or mandatory element sold as a component of Configurable Products |
| Configuration Option Group | A mechanism used to organize the management and presentation of Configuration Options |
| Configurable Product | A sellable entity composed of discretionary and mandatory Configuration Options that in aggregate, constitute a complete offering |
| Configuration | All decisions and selections executed to complete a Configurable Product, such as the selection of Configuration Options, or Configuration Option quantities |
| Configuration Rules | A mechanism that ensures all Configuration Options are valid against administrator defined business policies and that all Configurable Products are complete. Such mechanisms may exclude Configuration Options from a particular Configuration, include Configuration Options in a Configuration or recommend Configuration Options for inclusion in a Configuration. A Configuration Rule may be one of the following: Exclusion Rule, Inclusion Rule or Recommendation Rule. |
| Contact | A person associated with an Account |
| Constraint Rules | See Configuration Rule |
| CPQ Administrator | An Actor that is responsible for the creation and maintenance of all Apttus CPQ master data, i.e. the data that drives the Product Catalog, Configuration and pricing capabilities |
| Exclusion Rule | A mechanism that prevents Actors from adding mutually exclusive Products and Configuration Options to a Quote |
| Extended Price | A Quote price calculated by the Apttus solution as the sum of all Quote Line Item Net Prices |
| Field | A typed data element on a salesforce.com object used to articulate the definition of said object |
| Inclusion Rule | A mechanism that guarantees the inclusion of Products or Configuration Options in a Quote |
| List Price | A price sourced from a Price List |
| Net Price | The Quote Line Item price that includes Actors’ Price Adjustments which is systematically computed by the Apttus solution as: [Net Price] = [Base Price] x [Quantity] x [Term] +/- [manual Price Adjustments] |
| Opportunity | A salesforce.com entity that captures information specific to a particular deal |
| Organization | The salesforce.com virtual space provided to an individual customer of salesforce.com; including all data and applications, and is separate from all other organizations |
| Price Adjustment | A manual (i.e., as applied by an Actor) or systematic (i.e., as applied by a Conditional Price Rule) modification to a price sourced from a Price List. Such modifications may adjust prices upwards or downwards |
| Price Dimension | The salesforce.com Field used as the selection mechanism for List Prices from within Price Matrix; e.g. Quote Line Item quantity |
| Price Factor | A Price Adjustment capable of multiplying the price sourced from Price Lists via a value entered by an Actor, computed by the Apttus solution as: [Base Price] = [List Price] X [Price Factor] |
| Price List | A collection of prices for Products organized at the discretion of the business along dimensions such as Customer Loyalty, Customer Region, Customer Segment, Product Line and Currency |
| Price List Item | The definition of a List Price within a Price List along with descriptive and limiting data to support price administration |
| Price Matrix | An organization of List Prices via a set of value ranges for a particular Price Dimension |
| Price Override | A Quote Line Item price adjustment in which the Net Price is set to an amount that is entirely at the discretion of the Actor |
| Price Ruleset | An organizing structure to facilitate the administration and application of Conditional Price Rules |
| Product | See Product Catalog Item |
| Product Attribute | An organization of descriptive values that articulate various details of a Product e.g. Color, Region, Weight |
| Product Attribute Group | An organizing mechanism for Product Attributes |
| Product Attribute Value | A discrete and descriptive element of a Product Attribute, e.g. Red, Yellow, Green for a Color Attribute |
| Product Catalog | The collection of Product Categories and Product Catalog Items made available to Actors when creating Quotes |
| Product Catalog Item | A discrete sellable entity, typically identified by a unique identifier such as a SKU, referenced by a Quote Line Item when added to a Quote by an Actor |
| Product Catalog Search Filter | A mechanism that allows Actors to limit the Products displayed within the Product Catalogs |
| Product Category | A container of Product Catalog Items, other Product Categories or both that provides structure in the organization of the Product Catalog |
| Proposal Output File | A Prospect facing version of a Quote, i.e. a snap-shot of a Quote, generated as an Adobe PDF, Microsoft Word or Microsoft RTF formatted file |
| Proposal Template | A container of style and content inclusion rules that translate Quote information into Proposal Output Files |
| Prospect | A potential customer that will purchase goods or services for the first time |
| Quote | A container of proposed products and services including contextual descriptions, quantities and prices |
| Quote Line Item | An element of a Quote associated with a Product, quantity and one or several prices and discounts |
| Quote Workflow | All decisions and selections executed to complete a Configurable Product, such as the selection of Options or Option quantities |
| Recommendation Rule | A mechanism that prompts Actors to the include or exclude Products or Configuration Options in and from a Quote |
| Related Price List Item | The definition of a List Price (within a Price List ) that is a function of another Price List Item |
| Sales Rep | A type of Actor that creates Quotes on a day to day basis |
| UOM | Unit of Measurement for Price calculation |

# Appendix B—Quote Templates

|  |  |  |  |
| --- | --- | --- | --- |
| **Template Name** | **Type** | **Fields** | **Initial Text** |
| Quote Template | Proposal | Apttus\_Proposal\_\_Proposal\_\_c(NameApttus\_Proposal\_\_ExpectedStartDate\_\_c  Apttus\_Proposal\_\_Account\_\_c  OwnerId  Apttus\_Proposal\_\_Primary\_Contact\_\_c  Apttus\_Proposal\_\_Grand\_Total\_\_cTotal\_\_c)  Account(Name)  User(Name)  Contact(EmailNameMobilePhoneMailingAddress)  Apttus\_Proposal\_\_Proposal\_Line\_Item\_\_c(Apttus\_Proposal\_\_Product\_\_c,Name)  Apttus\_QPConfig\_\_Quantity2\_\_c  Apttus\_QPConfig\_\_LineType\_\_c  Apttus\_QPConfig\_\_ListPrice\_\_c  Apttus\_QPConfig\_\_NetPrice\_\_c)  Product2(NameApttus\_Config2\_\_Uom\_\_c) |  |

# Appendix C- Calculations

# Appendix D - Initial list of Attributes

|  |  |  |
| --- | --- | --- |
| **Attribute Group** | **Attribute** | **Product(s)** |
| Platform | Platform\_\_c | Apttus Intelligent Cloud  E-commerce  Order Management  Billing Management  Revenue Recognition  Incentives  Rebate Management  X-Author  Source-to-Pay  Intelligent Workflow Approvals (IWA)  Standard Support  Premier Support  Premier Plus Support  CPQ Admin Console  Sprint CPQ  Sprint CLM  Enterprise CLM  Enterprise CPQ  Ultimate CLM  Ultimate CPQ  Professional Services |