Design and Build a Working Industries CPQ Solution

Exercise Guide

Version 1.0

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Preface

These training exercises are based on the Spring '22 release of Salesforce Industries Communications, Media, and Energy & Utilities Clouds. For additional information about the topics covered in this module, see the documentation available in the Salesforce Industries Success Community at https://success.vlocity.com.

Overview

This Design and Build a Working Industries CPQ Solution course provides a practical extension of the functionality covered in the Build CPQ Solutions for Industries course. Participants will be presented with a scenario, and then will need to apply principles and skills learned in the Build CPQ Solutions for Industries course to build a prototype of their design in their training environment. Participants will present their work at the conclusion of the course.

What You Will Learn

When you complete this training, you will be able to:

- Design a product model
- Build products and product bundles in the Shared Catalog
- Create pricing
- Create promotions
- Design and build rules to ensure a perfect order

Prerequisites

The prerequisites for this training include successful completion of the Build CPQ Solutions for Industries course. In addition, a solid understanding of basic Salesforce concepts and functionality is required. You should also have a working knowledge of telecommunications, media, or energy and utilities industry business objectives.

The Business Scenario

Infiwave has grown rapidly in the last two years, providing businesses with products that increase profitability by enabling greater efficiency and effectiveness. Infiwave has experienced considerable success in large to mid-tier companies, and now they wish to expand their market offerings to small businesses as well.

To that end, marketing executives have designed a cloud collaboration suite of products that they wish to test-market in the northeast region of the United States. The suite will consist of web productivity tools that are designed to increase their internet usage and provide recurring monthly service revenue.

The cornerstone of this new collaboration suite is hosted cloud email service. Rather than small businesses having to devote resources to internal IT projects to host their own company email servers, Infiwave will offer cloud email as well as a new security product to ensure that even a small company's data is maintained with the same level of security as their enterprise counterparts.

In order to increase their internet data usage, product marketing has designed this introductory bundle to include a business video service and a virtual assistant, which includes either a Google Home or an Amazon Echo.

And finally, no bundle is complete without ongoing revenue from a support subscription: introducing the new Premier Cloud Support Plan, which is only available to customers of this bundle.

Value of the Cloud Collaboration Suite to Infiwave

IT RESOURCES	Dramatically reduce customer's IT resources
USAGE	Increase customer's data usage
MARKET SHARE	Increase RR's market share among small businesses
REVENUE	Increase recurring RR's monthly service revenue

Challenge 1: Model the Product

Scenario

The first part of the challenge is to design a product model for Infiwave's new Cloud Collaboration Suite. The Cloud Collaboration Suite is a set of products that will be test-marketed in the northeast region of the United States. The suite will consist of web productivity tools, and the business objective is to expand market share in the small to mid-tier business sector, using recurring monthly service revenue and increased internet usage.

Goal

- Determine product requirements based on a scenario
- Identify and query any gaps in requirements
- Apply the 4 key principles of product modeling to build a product model

Tasks

1. Review marketing requirements for the Cloud Collaboration Suite
2. Review existing entities in your training org
3. Create a product model diagram of the Cloud Collaboration Suite

Task 1: Review marketing requirements for Cloud Collaboration Suite

In order to increase overall market share, Infiwave's executives want to expand into the small business arena and to achieve that objective, product management has developed a new product that provides hosted email services. Marketing has taken the new email product and bundled it with existing products to create a new product bundle designed to be attractive to small businesses and increase their internet usage, as well as provide additional monthly service revenue. Your job is to design the product model that will satisfy the marketing requirements detailed in the next few pages.

New Product Brief 1: Cloud Collaboration Suite

Name	Cloud Collaboration Suite
Type	Product bundle offer
Product Code	C-OFF-007
Description	All the web collaboration tools you need to be successful in the cloud
Licensing	Per seat/user
Provisioning Notes	• Product bundle should be ordered in 1-user or 5-user packs
	• Include the following products in the bundle:
	o Cloud Email Service (new)
	o Smart Cloud Storage (existing)
	o Business Video Service (existing)
	o Black Ops Cloud Security (new)
	o Cloud Virtual Assistant Offer (new)
	o Cloud Support Plan (new)
Target Market	Business
Artwork	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/cloud_bundle.jpg

New Product Brief 2: Cloud Email Service

Name	Cloud Email Service
Product Code	C-CES-001
Description	Email anytime, anywhere—because you're in the cloud!
Licensing	Per seat/user
Provisioning Notes	• Required product in the Cloud Collaboration Suite bundle
	• Requires Smart Cloud Storage product (Existing product code C-SMC-002)
	• Not sold separately (must be ordered as part of Cloud Collaboration Suite)
	• Need to capture one email address per licensed user at order time
Target Market	Business
Artwork	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/cloud_email.png

New Product Brief 3: Cloud Security

Name	Black Ops Cloud Security
Product Code	C-CSP-001
Description	Ready to get serious about security? This is your chance!
Licensing	Per seat/user
Provisioning Notes	Optional product in the Cloud Collaboration Suite bundle
Target Market	Business
Artwork	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/cloud_security.png

New Product Brief 4: Cloud Virtual Assistant

Name	Cloud Virtual Assistant Offer
Product Code	C-OFF-008
Description	Help me get organized - in the Cloud!
Licensing	Per packaged device
Provisioning Notes	• Required product in the Cloud Collaboration Suite bundle
	• Requires either Amazon Echo 4th Gen or Google Home products, allow customer to choose
	• Not sold separately (must be ordered as part of Cloud Collaboration Suite)
Target Market	Business
Artwork	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/cloud_assistant.jpg

New Product Brief 5: Google Home

Name	Google Home
Product Code	C-SSP-001
Description	Meet your Google Assistant. Ask it questions. Tell it to do things. It's your own Google, always ready to help.
Unit of Sale	Per unit
Model	Google Home
SKU	5578849
UPC	811571018420
Color	White/Slate Fabric
Color Category	White
Brand	Google
Protection Plan	● 3 years for Business accounts (optional)
	● 2 years for Consumer accounts (optional)
Target Market	Business and Consumer
Artwork	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/google_home.jpg

New Product Brief 6: Amazon Echo

Name	Amazon Echo (4th Generation)
Product Code	C-SSP-002
Description	Echo (4th Gen) has a better sound, new design, and is available in a range of styles. Echo connects to Alexa to play music, make calls, set music alarms, and more!
Unit of Sale	Per unit
Protection Plan	3 years for Business accounts (optional)
	2 years for Consumer accounts (optional)
Model	B06XCM9LJ4 (charcoal)
	B0749WVS7J (heather gray)
	B0751RGYJV (oak)
	B06XXM5BPP (sandstone)
	B0752151W6 (walnut)
SKU	5982513 (charcoal)
	6036000 (heather gray)
	6130003 (oak)
	5982610 (sandstone)
	6130002 (walnut)
UPC	841667189741 (charcoal)
	841667169699 (heather gray)
	841667179889 (oak)
	841667179704 (sandstone)

	841667187037 (walnut)
Colors	Charcoal fabric
	Heather gray fabric
	Oak finish
	Sandstone fabric
	Walnut finish
Color Category	Black (charcoal)
	Gray (heather gray)
	Tan (oak)
	White (sandstone)
	Brown (walnut)
Brand	Amazon
Target Market	Business and Consumer
Artwork	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/echo_charcoal.jpg
	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/echo_heathergray.jpg
	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/echo_oak.jpg
	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/echo_sandstone.jpg
	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/echo_walnut.jpg

New Product Brief 7: Cloud Support Plan

Name	Cloud Support Plan
Product Code	C-PST-001
Description	Keeping our feet on the ground, 24x7, so you can fly high.
Licensing	Per user
Provisioning Notes	Required product in the Cloud Collaboration Suite bundle
Target Market	Business
Artwork	https://www.salesforce.com/content/dam/web/en_us/www/images/resources/training-images/cloud_support.png

Existing Product Brief: Smart Cloud Storage

Name	Smart Cloud Storage
Product Code	C-CSP-001
Changes to Provisioning:	When product is included in the Cloud Collaboration Suite bundle (since this is for small business accounts and we want to create a tiered business model):

- Include the 15 GB option
- Exclude the 10 TB option

Task 2: Review Existing Entities in Your Training Playground

The Shared Catalog allows you to reuse and repurpose products, attributes, and object types, so it's important to understand your existing foundation. Review the existing picklists, attributes, products, and object type hierarchy in your training playground's Catalog.

1. To log into the provided training playground:
    a. In your browser, go to https://login.salesforce.com.
    b. Enter your login credentials.

2. Using the Lightning App Launcher   , click **Vlocity CPQ.**

3. In the Lightning navigation bar, click **Vlocity Product Console**.

4. Review existing object types in the shared product catalog.

5. Review the existing products that will be bundled into the *Cloud Collaboration Suite*.

    a. **Smart Cloud Storage** product
    b. **Business Video Service** product
    c. **Protection Plan** product

6. Review existing product attributes.

7. Review existing picklists.

Task 3: Create a Product Model Diagram of the Cloud Collaboration Suite.

Create a product model diagram in a format of your choosing to describe the new Cloud Collaboration Suite. As you do so, consider the product modeling guidelines, and try to incorporate them into your design.