

Challenge 4: Build a Promotion

Scenario

Since this is a new product bundle, marketing wants to create a promotion to test-market it in a single region. Marketing selected New York state in the USA as the test-market and then worked with Google to develop an introductory offer for this region.

Goals


- Create a working promotion solution based on the requirements provided in the scenario
- Create and implement appropriate time plans and time policies for your promotion to meet specified requirements
- Demonstrate effective use of pricing and cardinality overrides within your promotion to meet requirements

Tasks

1. Review the marketing requirements for the *Google Cloud Collaboration* promotion
2. Build the promotion in the Product Console
3. Test the new promotion in the Cart
4. Score your promotion solution



Task 1: Review the Marketing Requirements for the Promotion



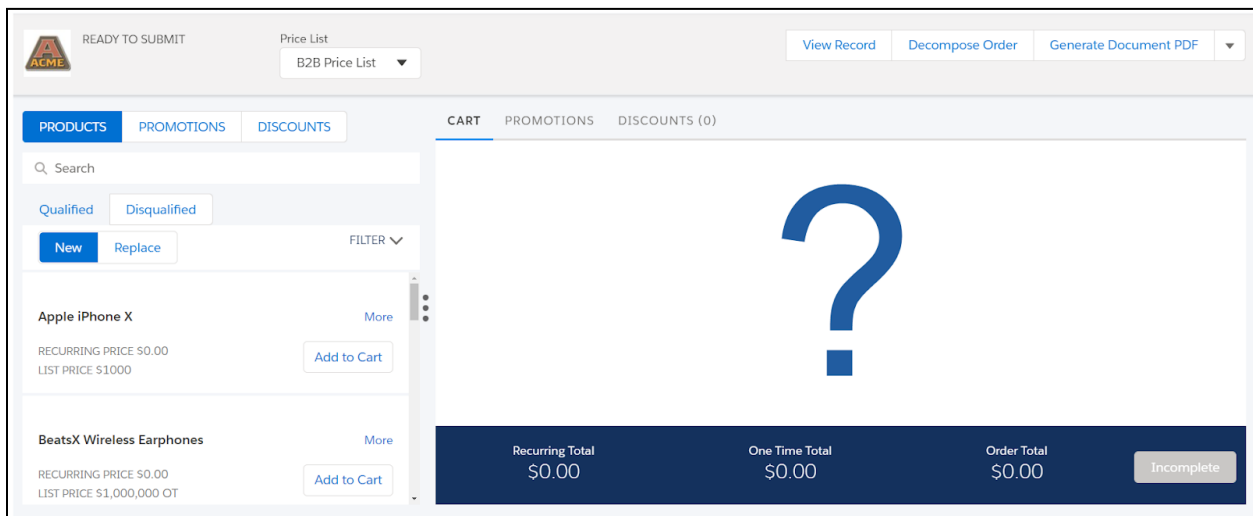
NEW Google Cloud Collaboration	
Description	6-month introductory pricing for business accounts in NY with promo code GETCLOUDY, includes FREE Google Home virtual assistant
Promotion Product	Cloud Collaboration Suite, 1-user pack
Promo Code	GETCLOUDY
Start/End	Service starts on day of purchase / ends 1 year later unless customer opts-in
Effective Dates	May 1 - Dec 31
Promo Pricing	10% off all network service products—NOT durable goods or support products FREE Google Home virtual assistant
Promo Pricing Duration	6 months
Requires	Google Home virtual assistant
Restrictions	Maximum 5 promotions per account
Target Market	B2B accounts in NY

Once you have your plan established, it is time for you to create your Google Cloud Collaboration promotion using the Product Console.

Dashboard		
Product Management		
Product	🔍	+
Promotion	🔍	+
Discount	🔍	+
Offer Migration Plan	🔍	+
Pricing		
Price List	🔍	+
Pricing Plan	🔍	+
Pricing Variable	🔍	+
Time Plan	🔍	+
Time Policy	🔍	+
Rules		
Function	🔍	+
Context Action	🔍	+
Context Dimension	🔍	+
Context Scope	🔍	+
Object Level Rule	🔍	+
Rule	🔍	+
Rule Set	🔍	+
Foundation		
Attribute	🔍	+
Picklist	🔍	+
Metadata		
Object	🔍	
String Translations	🔍	
Layout Management		
Facet	🔍	+
Section	🔍	+

Task 3: Test Your New Promotion in the Cart

Create a new order in your Cart and test out that all the criteria specified by the Marketing Team are met. This will include testing the maximum number of promotions per account, availability by account type and region, and a “requires” product relationship. Before you start, it may help to create a test plan to ensure you haven’t left anything out.



The screenshot displays the Salesforce CPQ Cart interface. At the top, there's a header with the ACME logo, a "READY TO SUBMIT" status, a "Price List" dropdown set to "B2B Price List", and buttons for "View Record", "Decompose Order", and "Generate Document PDF". Below the header, there are tabs for "PRODUCTS", "PROMOTIONS", and "DISCOUNTS". The "PRODUCTS" tab is active, showing a search bar, "Qualified" and "Disqualified" filters, and "New" and "Replace" buttons. A list of products is shown, including "Apple iPhone X" and "BeatsX Wireless Earphones", each with "RECURRING PRICE \$0.00", "LIST PRICE \$1000", and an "Add to Cart" button. The right side of the interface shows the "CART" tab with a large blue question mark in the center. At the bottom, a summary bar displays "Recurring Total \$0.00", "One Time Total \$0.00", and "Order Total \$0.00", along with an "Incomplete" button.

Task 4: Score your Promotion Solution

Required	
<i>Promotion Feature / Functionality</i>	<i>Points</i>
<input type="checkbox"/> Create a promotion	1
<input type="checkbox"/> Create a time plan	1
<input type="checkbox"/> Set promotion cardinality	1
<input type="checkbox"/> Set the promotion time plan/policy	1
<input type="checkbox"/> Create a promotion pricing override	1
<input type="checkbox"/> Create a promotion product cardinality override	1
Total	
Nice to Have	
<input type="checkbox"/> Set the promo code	1
Total	
Pricing Solution Score	