CLM CPQ Integration Capabilities

Exercise Guide

Version 1.0

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Preface

These training exercises are based on the Spring '22 release of the Contract Lifecycle Management (CLM) application.

Overview

These exercises cover the CLM CPQ Integration Capabilities. They show how to create contract-based discounts, create frame agreements, and activate them for future orders. With an approved and activated contract-based discount, the terms of the frame agreement are in effect and when creating quotes and orders customers will inherit the terms (both pricing and non-pricing) according to the frame agreement.

This is a hands-on course with practical lab exercises. The lab exercises are designed to be used with a provided training playground.

What You Will Learn

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

- Create contract-based discounts
- Create and activate frame agreements for future orders

Prerequisites

The prerequisites for these exercises include a solid understanding of basic Salesforce concepts and functionality. You should also have a working knowledge of telecommunications, media, or energy and utilities industry business objectives.

Exercise 6-1: Frame Agreement Discounts

Scenario

Infiwave sells its communication products to its B2B customers, such as Acme. Infiwave negotiates a frame agreement with Acme for a 20% discount on all accessories that Acme buys over the next two years. Infiwave creates a contract as a frame agreement for Acme. A new sales quote is created for Acme and a charging stand accessory is added. The price is automatically discounted by 20% because of the active frame agreement. If products other than accessories are added, those products receive the regular price because they are not part of the frame agreement.

Goal

- Create contract-based discount
- Create frame agreements
- Activate the contract

Tasks

1. Create a contract-based discount
2. Create a new Opportunity
3. Review the frame agreement

Time: 30 mins

ALERT:
If you've just received your training playground, add your email address to the system administrator profile to ensure you receive all system notifications. In the upper-right, click on the **Avatar** and select **Settings**. Enter your email address in the **Email** field on the Personal Information page and click **Save**.

Task 1: Create a contract-based discount

1. Using the **Lightning App Launcher** ⣿ , type `product console` in the search box. Click **Vlocity Product Console**.
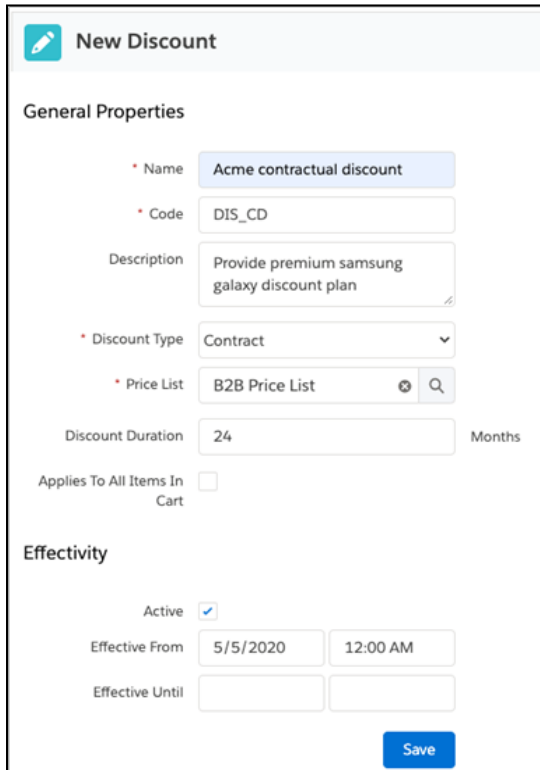

2. Under Product Management, click **+** icon next to **Discount** to define a new discount.

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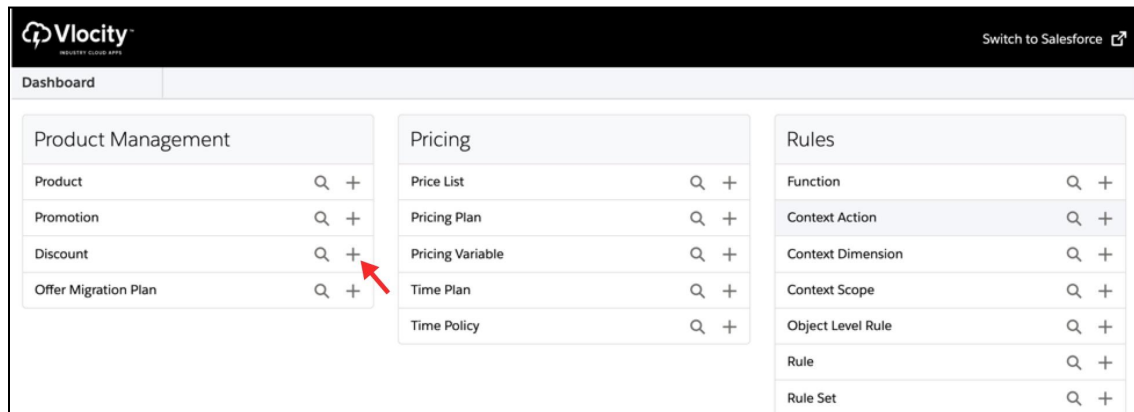
3. Enter the following information:

Field	Value
Name	Acme Contractual Discount
Code	DIS_CD
Description	Provide premium samsung galaxy discount plan
Discount Type	**Contract**
Price List	**B2B Price List**
Discount Duration	**24**
Active	**✔**
Effective From	**[today's date]**
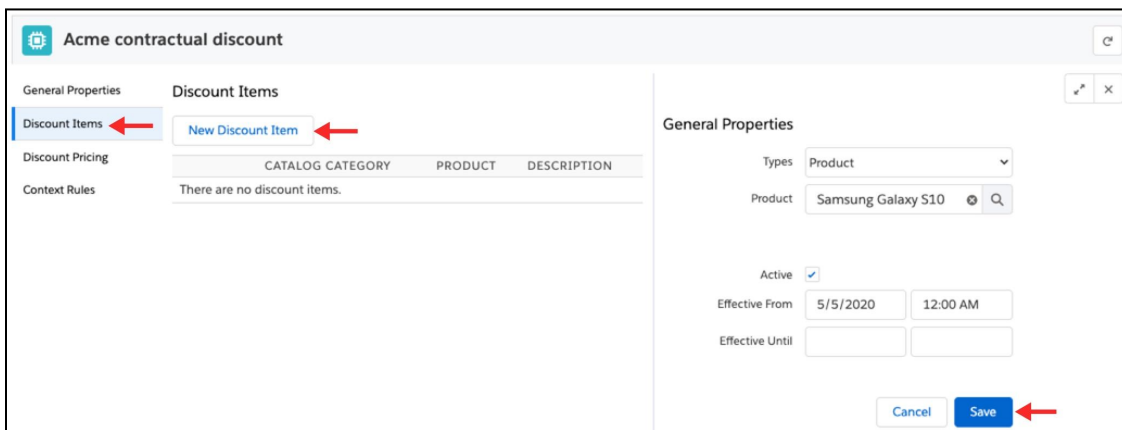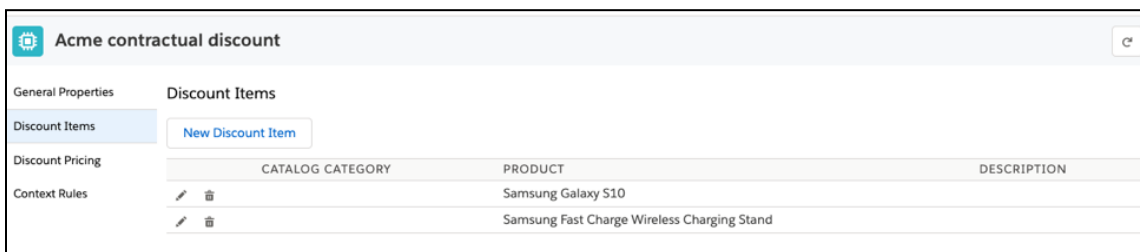
4. Click **Save**.

5. To define a new discount item, click the **Discount Items** facet and click **New Discount Item**.

6. Enter the following information and click **Save**.

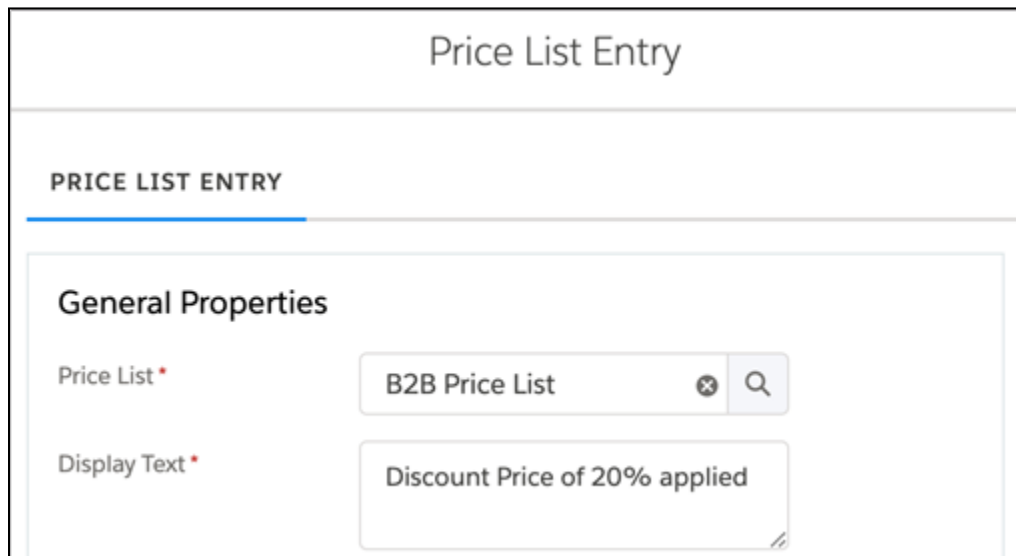| Field	Value
Type	**Product**
Product	**Samsung Galaxy S10**
Active	✔
Effective From	**[today's date]**

7. Similarly, add 1 more Discount Item: **Samsung Fast Charge Wireless Charging Stand** of Type **Product**.

8. To define a new discount pricing item, click the **Discount Pricing** facet and click **New**.

a. In the Price List Entry dialog window, complete the **General Properties** section.

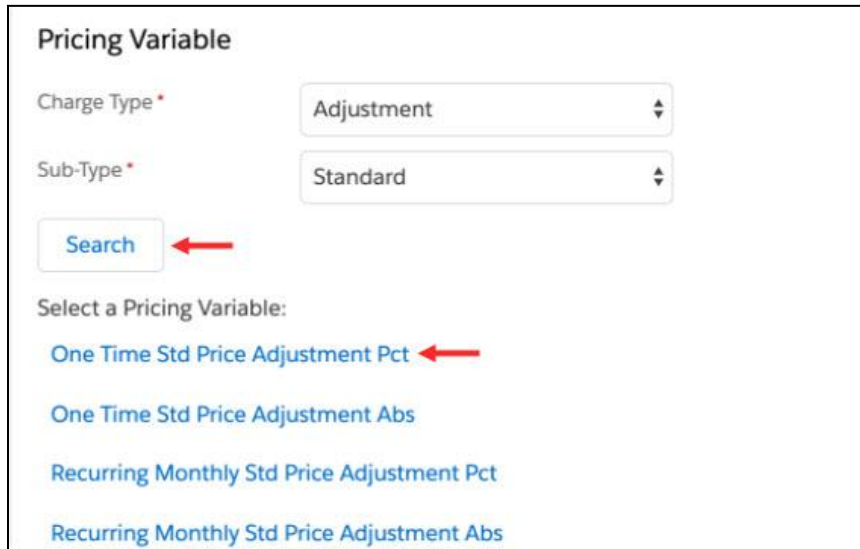| Field	Value	Notes
Price List	**B2B Price List**	This is the price list where this price list entry will be stored.
Display Text	`Discount Price of 20% applied`	Display text is required.

9. Find and choose the specific pricing type:

a. Complete the **Pricing Variable** search requirements.

Field	Entry
Charge Type	**Adjustment**
Sub-Type	**Standard**

b. Click **Search**. A list of available pricing variables displays.

    c.   Select **One Time Std Price Adjustment Pct** from the Pricing Variables results list.

10. Select the pricing element.

    a.   Notice the **Pricing Element** section displays a list of prices associated with this type of pricing.

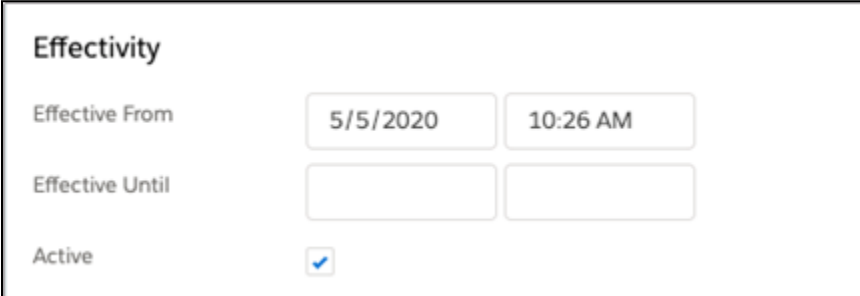   b.   In the **Pricing Element** section, select **20% Off**.

11. Ensure the product can appear in the Product list of the cart by setting the product price to be effective immediately and have an active status.

    a. In the Effectivity section, complete this information.

Field	Entry
Effective From	**[today's date]**
Active	✔
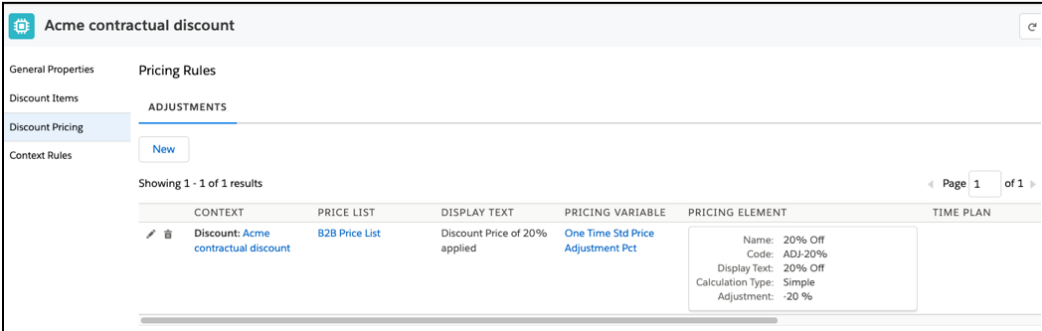
    b. Click **Save**. The price list entry now displays in the list of pricing adjustments for the product.

NOTE:

After you configure Discount Pricing, confirm that the Adjustment Value in the Pricing Elements facet for the Price List Entry is not empty. If you do not specify an Adjustment Value in the Price List Entry, the discount will not be applied to eligible products in the Cart.

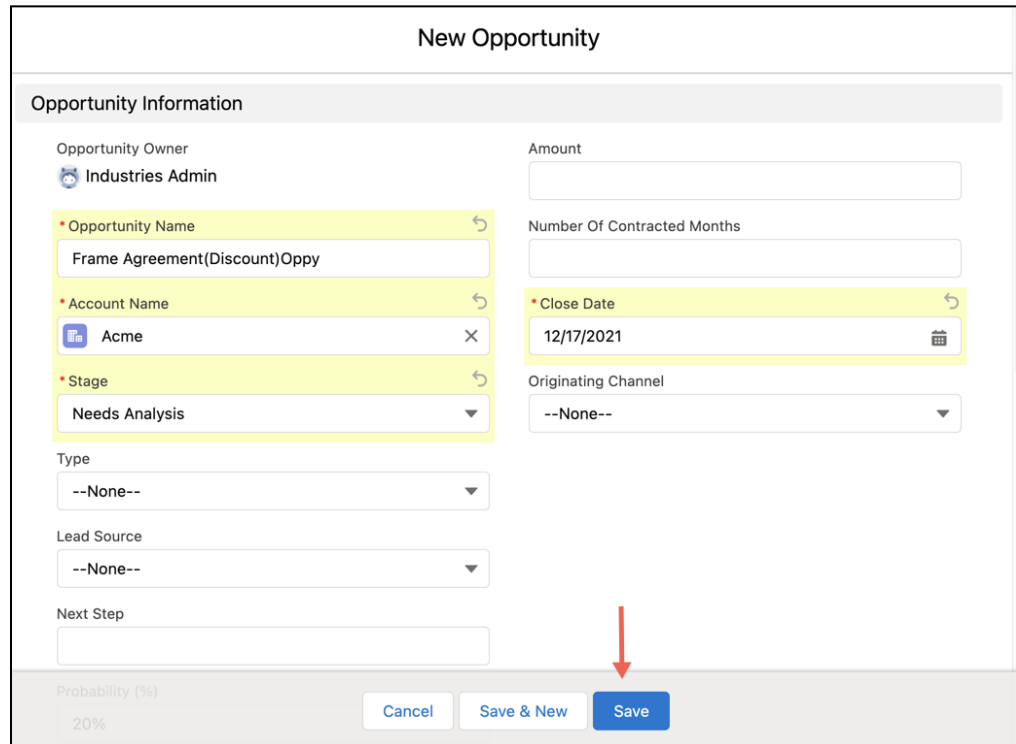## Task 2: Create a new Opportunity

1. Create a new Opportunity

   a. Using the **Lightning App Launcher** ⠿ , type opportunities in the search box. Under **Items**, click **Opportunities**.
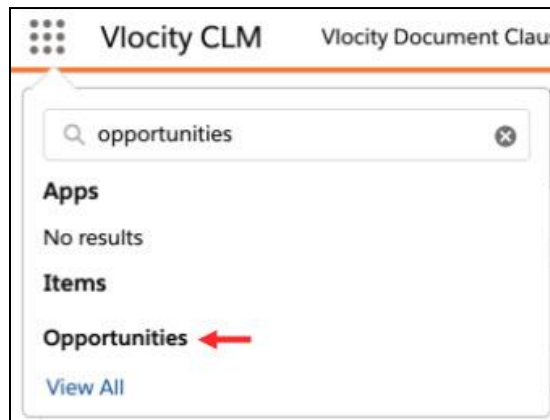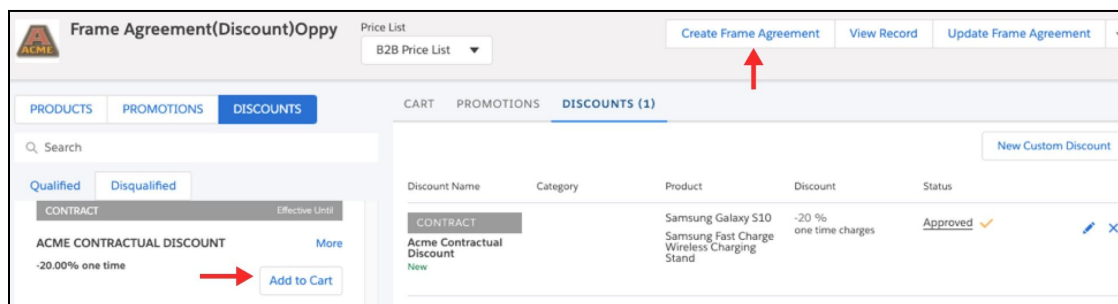

   b. This launches the **Opportunities** tab. Click **New**.
   c. Complete the following fields and click **Save**.

Field	Value
Opportunity Name	`Frame Agreement(Discount)Oppy`
Account Name	**Acme**
Stage	**Needs Analysis**
Close Date	**[today's date]**

    d. From the Power Launcher, click **Configure**. This invokes the Cart.

2. From the Price List drop-down, select **B2B Price List**.

3. Click on the **DISCOUNTS** tab, add the new contract-based discount created in the previous steps **ACME CONTRACTUAL DISCOUNT** to the cart. This applies the discount to the product.

4. Click **Create Frame Agreement**. This creates a new contract record and moves the negotiated discounts over to the contract record.

5. Click the **Details** tab on the Contract page and notice that the **Is Frame Contract** checkbox is checked.

6. Edit the following fields on the contract **Details** tab and click **Save**.

Field	Value	Description
Contract Start Date	**[today's date]**	Enter a start date that you want the discounts to take effect
Contract Terms (months)	**24**	Optional

NOTE:
If you don't define the Contract Start Date, you will not see the effective start dates and end dates for the discounts and the discounts will not apply.
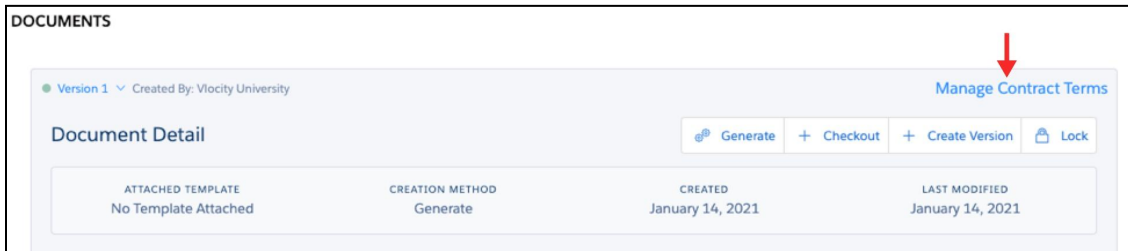
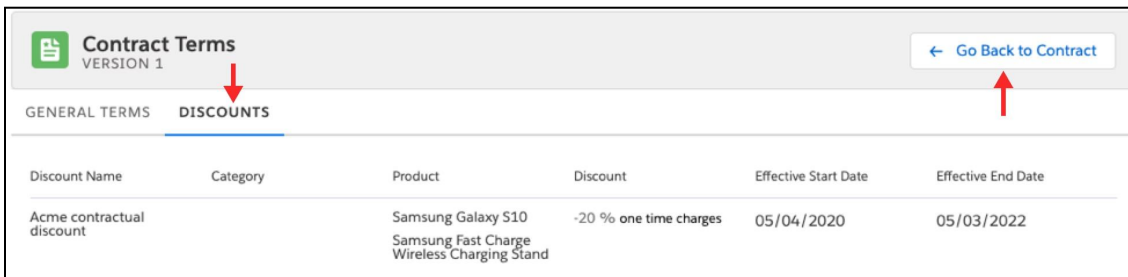7. Click the **Documents** tab and scroll down the page to the **DOCUMENTS** section and click **Manage Contract Terms**.

8. Click the **DISCOUNTS** tab to see the pricing terms with the effective start and end dates.

9. Click **Go Back to Contract** to view the Contract Detail page again.

10. Generate the document.

    a. Click **Generate**.

      b. Select the **Telecom Services Agreement (version 2) [Web]** template created in the previous task to generate the contract.
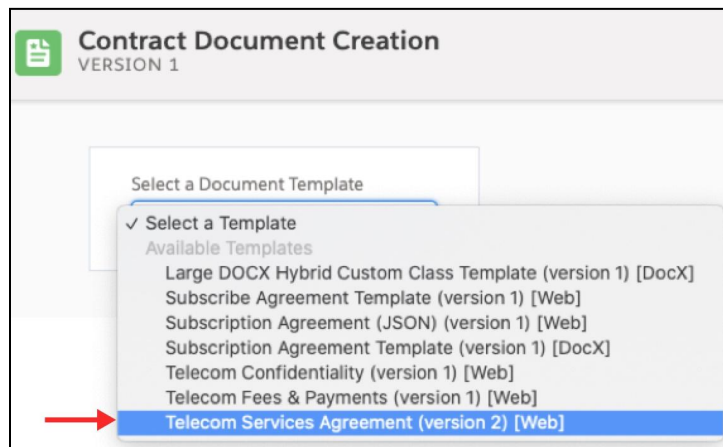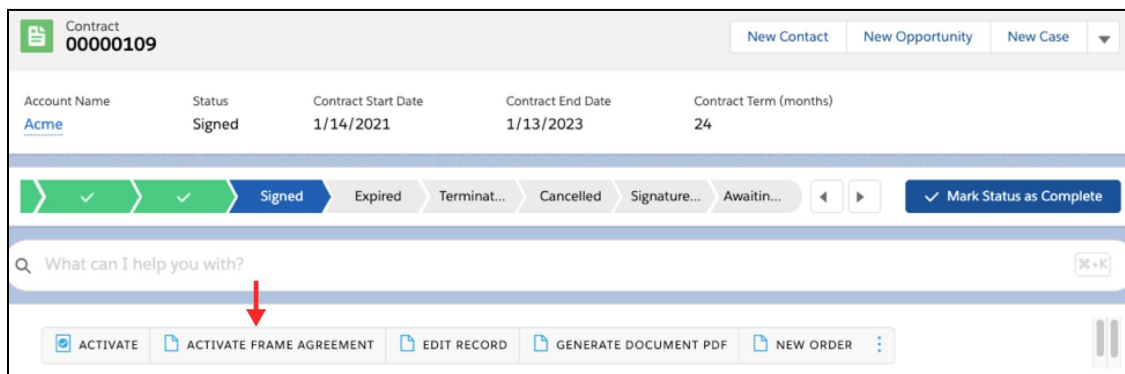

      c. Click **Check In**.

11. Complete the contract life cycle to eSign the contract.

      a. Submit the contract document for internal approval.
      b. Send the contract for eSignature.

The contract status changes to Signed.

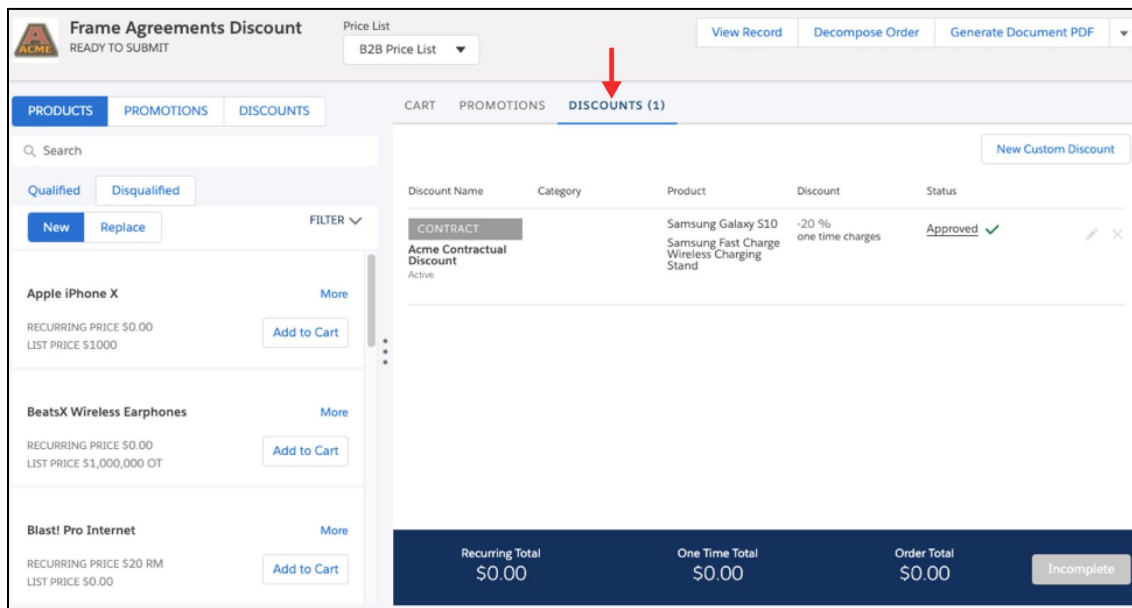12. Click **ACTIVATE FRAME AGREEMENT** to set the status to Activated.

Now future orders can use this contract.

Task 3: Review the frame agreement

1. Create a new order using the frame agreement you just created.

   a. In the **Lightning Navigation bar**, click the **Orders** tab and click **New**.
   b. Complete these fields and click **Save**.

Field	Value
Order Name	Frame Agreements Discount
Account Name	**Acme**
Price List	**B2B Price List**
Order Start Date	**[today's date]**

   c. From the Power Launcher, click **Configure Order**. This invokes the Cart.

2. Click on the **DISCOUNTS** tab in the cart and notice the discount contract **Acme Contractual Discount** is added to the cart.
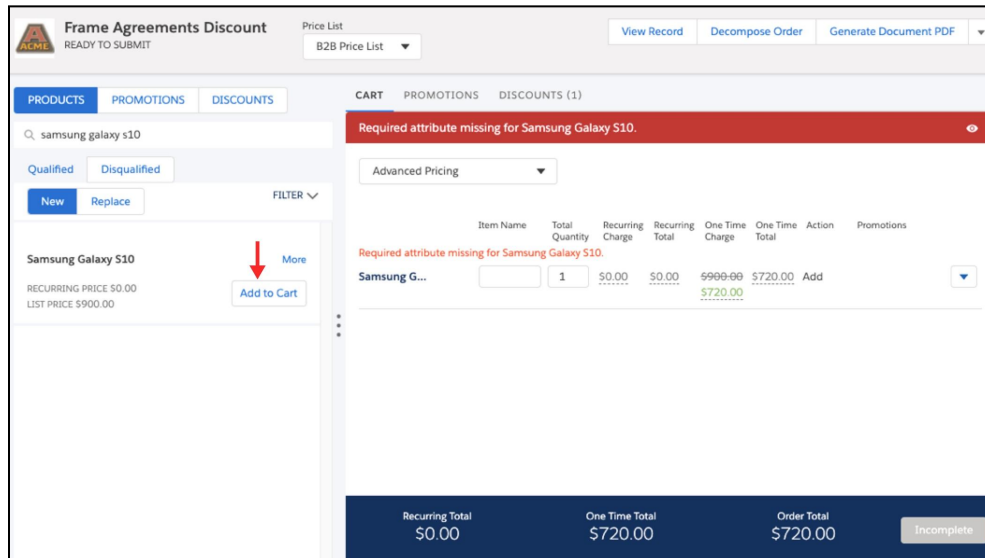

3. Search for the product **Samsung Galaxy S10** and add it to the cart.

   a. In the search field under the **PRODUCTS** list, enter Samsung galaxy s10.
   b. Click **Add to Cart**.

4. View the display text for the pricing changes.

    a. Click on the **CART** tab.

    b. In the **One Time Charge** column, to the right of **Samsung Galaxy S10**, click the green adjusted price link.

    c. Click the **information** icon 🛈 .

    d. In the **Details** popup window, notice the text you entered in the display text field of the price list entry for the **Samsung Galaxy S10**.
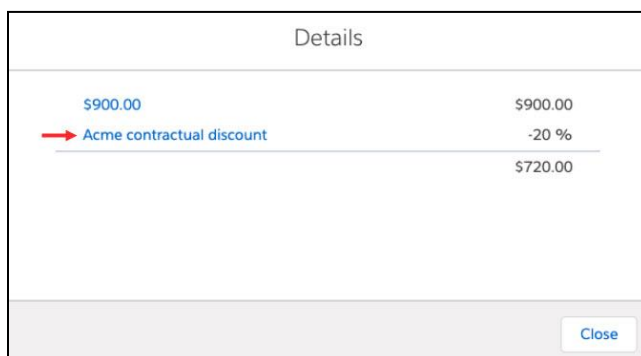
    e. Click **Close** to close the **Details** popup window.

5. Similarly, add the **Samsung Fast Charge Wireless Charging Stand** to the cart and note the discount applied.

Exercise 6-2: Using Frame Agreements with CLM Challenge

Scenario

Global Media negotiates a 50% discount on all Samsung Galaxy S8 Active phones and Samsung Galaxy S8 Active Accessory Packs they purchase from Infiwave over the next year. After the handshake, Infiwave creates the contract as a frame agreement. Any products ordered outside of the frame agreement will not include discounted pricing.

Goal

- Create contract-based discount
- Create frame agreements
- Activate the contract

Tasks

1. Create a contract-based discount
2. Create and activate the Frame Agreement
3. Review the frame agreement discount

Time: 30 mins

Task 1: Create a contract-based discount

1. Create a contract-based discount.

Task 2: Create and activate the Frame Agreement

1. Create and configure an Opportunity to add the contract-based discount.
2. Note the field **Is Frame Contract** once you create the frame agreement.
3. Update the contract fields.
4. Note the pricing terms with the effective start and end dates under Manage Contract Terms.
5. Select the **Telecom Service Agreement (version 2) [Web]** template to generate the document.
6. Complete the contract lifecycle to activate the frame agreement.

Task 3: Review the frame agreement discount

1. Create a new order using the frame agreement created.
2. Add the Samsung Galaxy S8 Active phone, Samsung Galaxy S8 Active Accessory Pack, and Samsung Galaxy Note8 to the cart.
3. Note the pricing for the Samsung Galaxy S8 Active phone, Samsung Galaxy S8 Active Accessory Pack, and Samsung Galaxy Note8.

TRAILHEAD

Yay! All done!