

Challenge 5: Add Rules to Your Products

Scenario

With the new product bundle built, priced, and ready to be promoted, it's time to create some rules to ensure that it is ordered perfectly. Marketing has drafted requirements and shared them with you. Now it's your job to translate their requirements into an Industries CPQ solution!

Goals

- Create and implement context mappings, context scopes, and context dimensions to meet scenario requirements
- Create and apply rules, rule conditions, and rule sets to meet scenario requirements
- Build product relationships and entity filters to create rules to implement scenario requirements

Tasks

1. Review marketing rules needed to ensure the new products, pricing, and promotion are ordered correctly
2. Build any context rules needed in the Product Console
3. Build any advanced rules needed in the Rule Builder
4. Test the new rules in the Cart

Task 1: Review the Marketing Rules

Rules to Apply

Cloud Collaboration Suite should be available only to business accounts in NY, MA, CT, RI and PA.

Google Cloud Collaboration Promo should be available only with the promo code **GETCLOUDY** and to business accounts in NY.

Regarding the **Business Video Service** - if the account has **Broadband Cable Service** as an asset and the Broadband Download Speed attribute on the asset is less than 100 Mbps, issue a warning to the user that performance may be insufficient to support the Business Video Service, and recommend the **BLAST Pro Internet** product.

The **Cloud Support Plan** is free to accounts with Platinum SLA agreements.

Advanced Requirements

Ensure no more than 5 **Cloud Email Service** products in the cart in the 5-pack bundle.

For the **Google Cloud Collaboration Promotion**, if the account cancels the **Cloud Email Service** during the promotional period, assess a \$100 penalty.

Task 2: Build Any Context Rules Needed in the Product Console

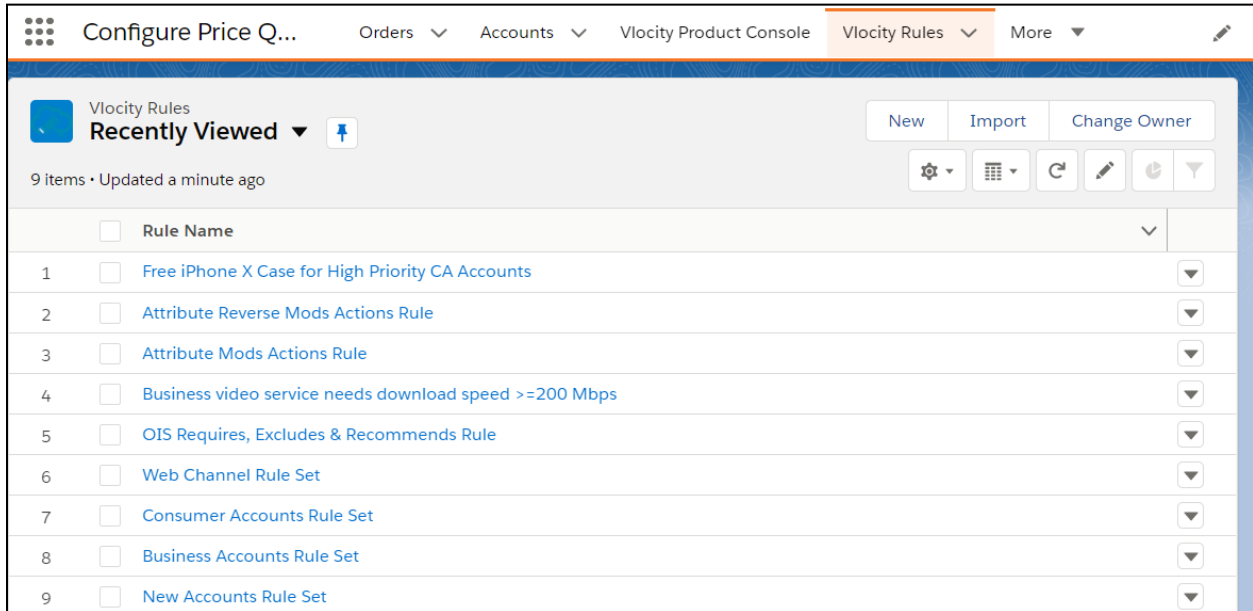
Once you have reviewed the requirements, you need to decide which of the requirements should be built as context rules, and which are advanced rules. If you need help on this, please refer back to the rules module in the training called *Rules: How to Decide*.

Your context rules will be built using the Rules functionality in the Product Console.

Dashboard																																																		
<div>Product Management</div> <table><tr><td>Product</td><td>Q</td><td>+</td></tr><tr><td>Promotion</td><td>Q</td><td>+</td></tr><tr><td>Discount</td><td>Q</td><td>+</td></tr><tr><td>Offer Migration Plan</td><td>Q</td><td>+</td></tr></table>	Product	Q	+	Promotion	Q	+	Discount	Q	+	Offer Migration Plan	Q	+	<div>Pricing</div> <table><tr><td>Price List</td><td>Q</td><td>+</td></tr><tr><td>Pricing Plan</td><td>Q</td><td>+</td></tr><tr><td>Pricing Variable</td><td>Q</td><td>+</td></tr><tr><td>Time Plan</td><td>Q</td><td>+</td></tr><tr><td>Time Policy</td><td>Q</td><td>+</td></tr></table>	Price List	Q	+	Pricing Plan	Q	+	Pricing Variable	Q	+	Time Plan	Q	+	Time Policy	Q	+	<div>Rules</div> <table><tr><td>Function</td><td>Q</td><td>+</td></tr><tr><td>Context Action</td><td>Q</td><td>+</td></tr><tr><td>Context Dimension</td><td>Q</td><td>+</td></tr><tr><td>Context Scope</td><td>Q</td><td>+</td></tr><tr><td>Object Level Rule</td><td>Q</td><td>+</td></tr><tr><td>Rule</td><td>Q</td><td>+</td></tr><tr><td>Rule Set</td><td>Q</td><td>+</td></tr></table>	Function	Q	+	Context Action	Q	+	Context Dimension	Q	+	Context Scope	Q	+	Object Level Rule	Q	+	Rule	Q	+	Rule Set	Q	+
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Task 3: Build Required Advanced Rules in the Vlocity Rule Builder

Some of the marketing requirements point to the need for advanced rules. For this, you will need to go to the Vlocity Rules tab and create your rules in the Vlocity Rule Builder, as shown below.

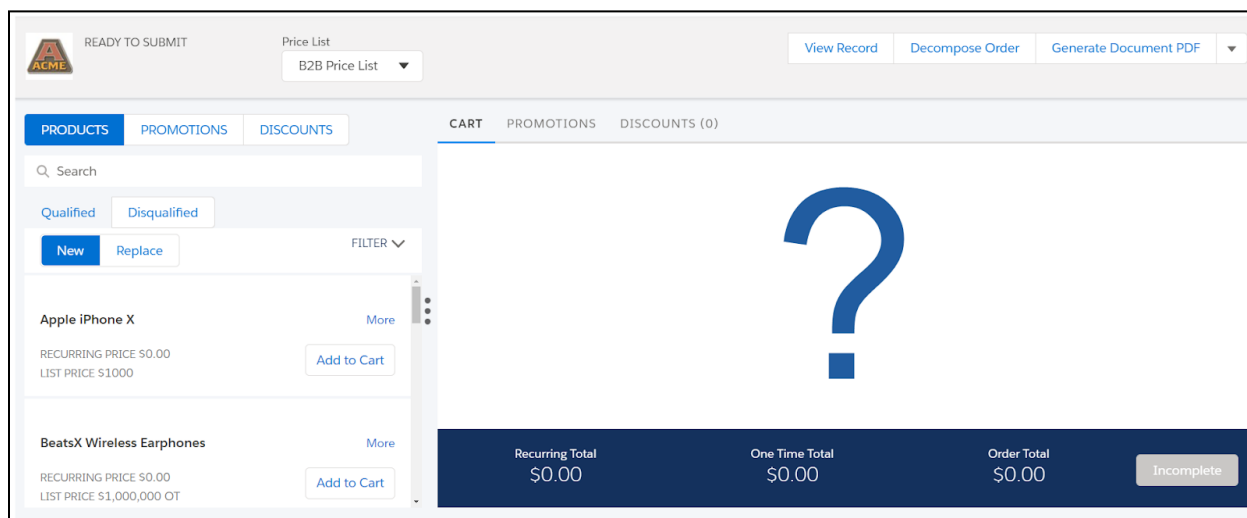


The screenshot shows the Vlocity Rules interface. At the top, there's a navigation bar with tabs: "Configure Price Q...", "Orders", "Accounts", "Vlocity Product Console", "Vlocity Rules" (selected), and "More". Below the navigation bar, the "Vlocity Rules" section is displayed. It includes a "Recently Viewed" header with a dropdown arrow and a pin icon. Below this, it says "9 items • Updated a minute ago". To the right of this text are buttons for "New", "Import", and "Change Owner", along with a row of icons for settings, list view, refresh, edit, delete, and filter. The main area contains a table with 9 rules, each with a checkbox, a number, and a rule name. The rules are:

	<input type="checkbox"/>	Rule Name	
1	<input type="checkbox"/>	Free iPhone X Case for High Priority CA Accounts	▼
2	<input type="checkbox"/>	Attribute Reverse Mods Actions Rule	▼
3	<input type="checkbox"/>	Attribute Mods Actions Rule	▼
4	<input type="checkbox"/>	Business video service needs download speed >=200 Mbps	▼
5	<input type="checkbox"/>	OIS Requires, Excludes & Recommends Rule	▼
6	<input type="checkbox"/>	Web Channel Rule Set	▼
7	<input type="checkbox"/>	Consumer Accounts Rule Set	▼
8	<input type="checkbox"/>	Business Accounts Rule Set	▼
9	<input type="checkbox"/>	New Accounts Rule Set	▼

Task 4: Test Your New Rules in the Cart

Woo hoo! You're nearly done! The next step is to test your new rules in the Cart. Do you have a test plan so you can make sure you haven't forgotten anything?



Task 5: Score Your Rules Solution

Required	
<i>Rule Feature / Functionality</i>	<i>Points</i>
<input type="checkbox"/> Create a qualification rule (context rule)	1
<input type="checkbox"/> Create a qualification rule for pricing (context rule)	1
<input type="checkbox"/> Create a product relationship (advanced rule)	1
<input type="checkbox"/> Create an entity filter (advanced rule)	1
<input type="checkbox"/> Create a rule in the Vlocity Rule Builder (advanced rule)	1
Total	
Nice to Have	
<input type="checkbox"/> Create a penalty rule (context rule)	5
<input type="checkbox"/> Create a compound entity filter (advanced rule)	5
Total	
Rules Solution Score	