Extra Tables

Product Subscription Term & Quote Subscription Term

Subscription Product	Product Subscription Term	Price	Quote Subscription Term	**Prorate Multiplier** *Quote sub. term / Product sub. Term*	Total
MS Office	1 month	$10	12 whole months	12/ 1 = 12	$120
Cloud Storage	12 months	$20	6 whole months	6 / 12 = 0.5	$10

Prorate Precision

January 10th - March 20th = 2 whole months & 11 days OR 70 days				
Prorate Precision	**List Price**	**Prorate Multiplier Formula**	**Prorate Multiplier**	**Net Price**
Monthly	$10/mo	Quote Term Rounded Up / Product's Default Subscription Term	3 months / 1 = **3**	$10 * 3 = **$30**
Monthly + Daily	$10/mo	Quote Term's Whole months + *Extra Days / (365/12)* *(Numerator: Days in year Denominator: default subscription term)*	2 months + 11/ (365/12) = **2.3616**	$10 * 2.3616 = **$23.616**
Day (Product Term Unit is Day)	$10/day	Quote Term / Product's Default Subscription Term	70 days / 1 = 70 days = **70**	$10 * 70 = **$700**
Daily (Product Term Unit is Month)	$10/mo	Effective Quote Term / Sample Subscription Term	70 days / 31 = **2.2581**	$10 * 2.2581 = **$22.58**

Product Option Types

	Component	Accessory	Related Product
Functionally dependent?	Yes	Yes	No
Relationship to parent quantity?	Proportional	Independent	Independent
Quantity Editable in Quote Line Editor?	No	No	Yes

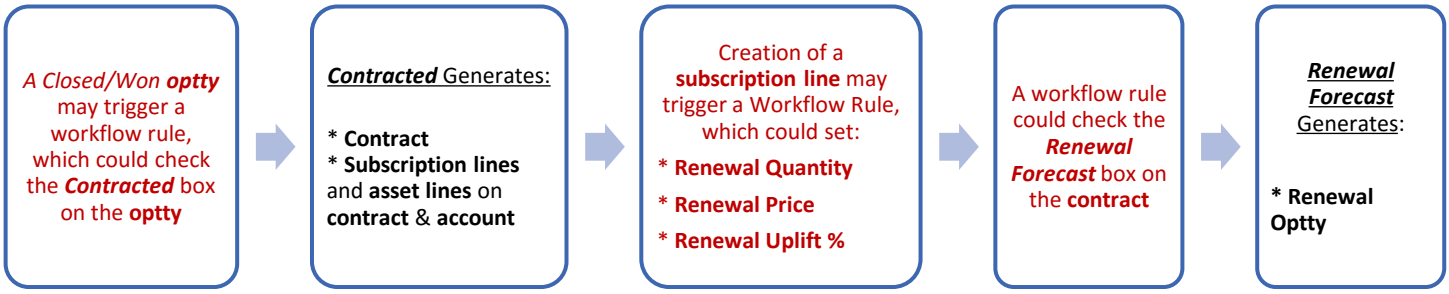
Configuration Types

Configuration Type	Configuration Event	Behavior
None	None	Default – Salesperson configures product if they choose to.
Allowed	**Edit**	Same as None/None ^^^
Allowed	**Always**	Always brings user to configuration after selection.
Allowed	**Add**	Brings user to configuration after initial selection only. Configuration button is removed.
Required	Always	User is required to configure nested bundle.
Disabled	Always	User cannot configure product bundle.

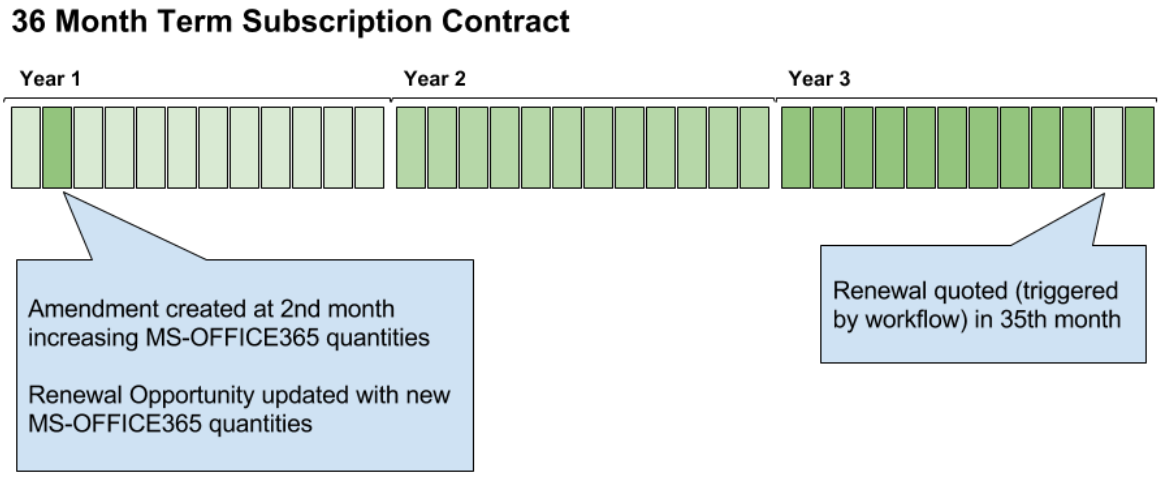
Contracting & Renewals

In the contract/amendment/renewal cycle, certain checkboxes will trigger the creation of records. You can use a workflow rule to automate this process.

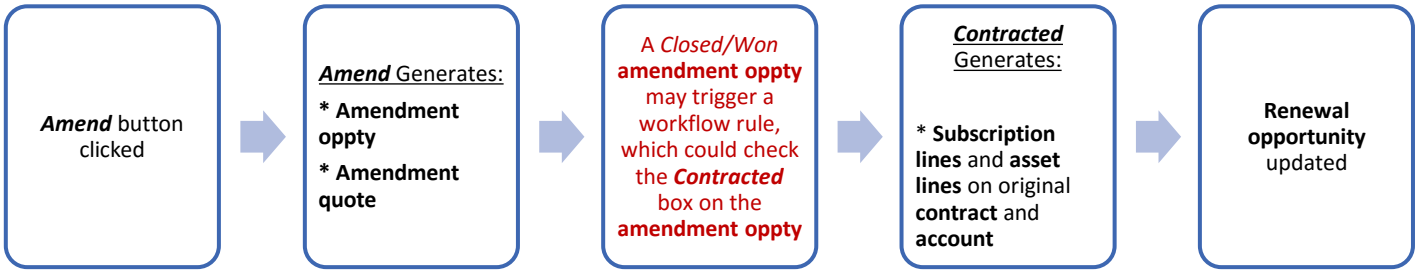
Contracting the opportunity



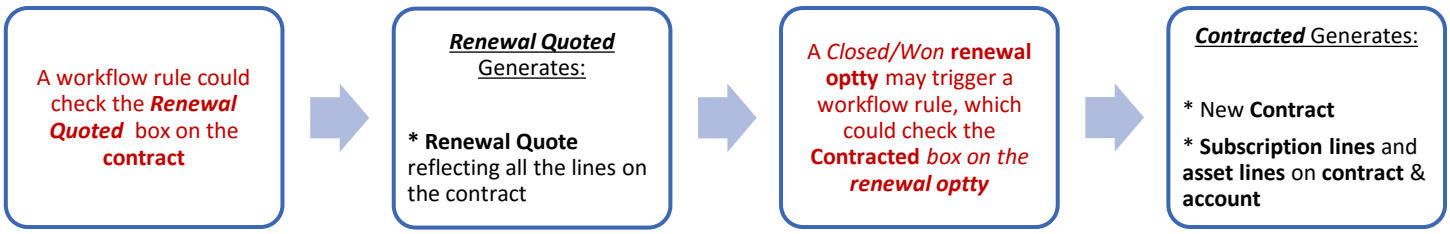
Confidential



Amending the contract



Renewing the contract



Troubleshooting Contracting

1) Account associated to Opportunity
2) Primary Quote on Opportunity
3) Start Date on Quote
4) Subscription Term or End Date on Quote
5) Subscription Products added on Quote (i.e. no Subscription Pricing value on product/quote line)
6) Contracted Check box = True