CPQ on Salesforce Spring 2018 User Guide

20 April 2018

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Apttus enables sales channels to sell **more**, sell **bigger**, and sell **anywhere**. Built within the Salesforce1 platform, Apttus CPQ is designed to boost sales effectiveness by guiding users to the best possible quotes for all products, pricing, and channels. In addition, by integrating quoting software with your contract processes, you can automate renewal quotes based on previously agreed upon pricing and terms.

Apttus CPQ is a key component of the Apttus Quote-to-Cash solution, allowing sales organizations to speed time to revenue, prevent revenue leakage, and reduce risk.

- **Enhance Sales Effectiveness with System-Driven Guidance:** Improve deal size and close rates by providing all channels the latest product and pricing insights.
- **Quickly Scale Your Business:** Leverage your Salesforce investment to drive productivity and global growth.
- **Sell Anything, From Anywhere, On Any Device:** With mobile capability, sales channels can close deals anytime and anywhere.

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Key Benefits

- **Boost Revenue and Maximize Margins:** Create more intelligent quotes.
- **Increase Sales Effectiveness:** Shorten cycles and reduce sales friction.
- **Streamline:** Improve customer relationships.
- **Scalability:** Rapidly grow your business with the most advanced cloud platform.

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Key Capabilities

- **Robust Configuration:** Configure any product or service, including bundles, constraints, and options.
- **Pricing Options:** Define pricing hierarchies and tiers based on parameters like volume, units, and usage.
- **Price Adjustments:** Adjust prices based on discounts, markups, and price overrides.
- **Asset-Based Ordering:** Create quotes from existing agreements and purchase history.
- **Guided Selling:** Identify optimal offerings through guided selling and upsell recommendations.
- **X-Author for CPQ:** Leverage Microsoft Excel to create quotes while maintaining CPQ rules and processes.
- **Proposal Generation:** Create professional proposals from standard templates.
- **eSignature for Proposals:** Obtain digitally signed approvals for proposals.
- **CPQ Analytics:** Analyze quoting cycle time, acceptance rates, product line revenue, and more.

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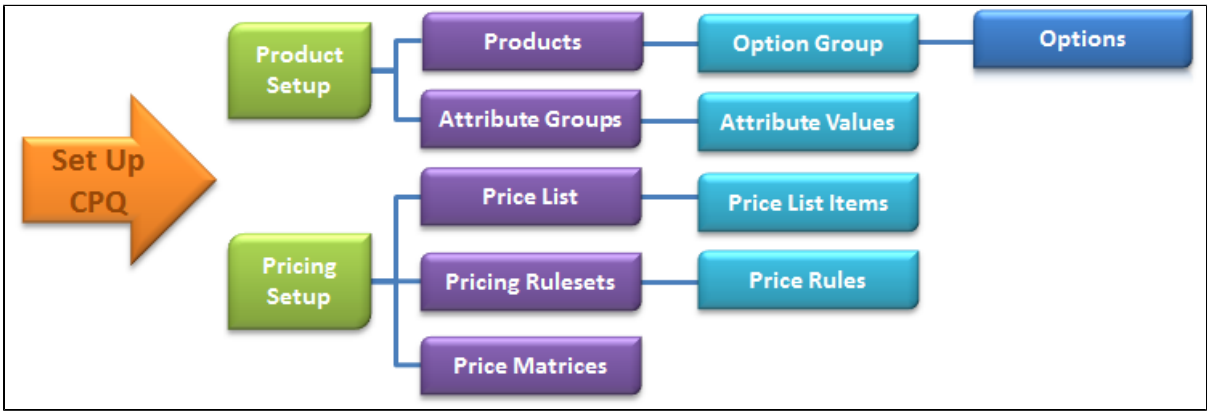
Getting Started

Apttus CPQ Model

It is important to understand Apttus product and pricing objects and their relationships to each other in the overall application. Apttus CPQ is divided into two major areas - **Product Setup** and **Pricing Setup**. Products and Pricing are defined and customized based on how your organization wants to set up their configuration.



Logging in to CPQ

Log in to your Salesforce.com org to access Apttus CPQ.

> Do not use the Back button on your browser when using CPQ.

Before you log in to CPQ, make sure you meet the following criteria.

- You have installed all of the required CPQ module packages.
- You have administrative privileges.
- You have login credentials provided by Apttus.

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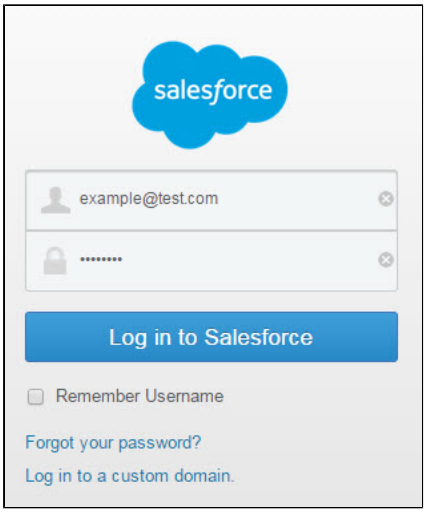
To log in to CPQ

1. Go to http://www.salesforce.com/.
   Or
   If your organization is using a sandbox or test environment to access Apttus CPQ (for example, if you are doing user acceptance testing), go to http://test.salesforce.com/ instead.
2. In the toolbar at the top of the page, click **Login**. The login page opens.



3. Enter your User Name and Password, and click **Log in to Salesforce**.
   You have successfully logged into CPQ.
4. Navigate to the Force.com App Menu and select either **Apttus Product Setup** or **Apttus Pricing Setup** to access the Product or Pricing setup tabs, respectively.

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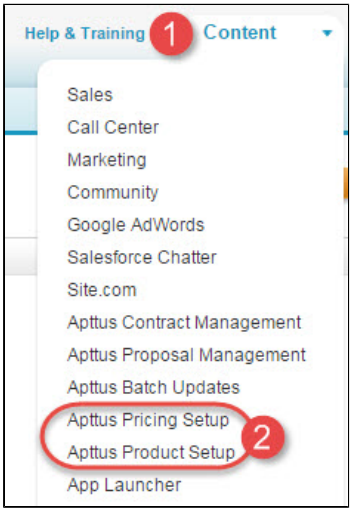

Congratulations! Now you are ready to start working with your products and pricing in Apttus CPQ.

Now that you have logged in, you are ready to start Navigating the CPQ Home Page.

CPQ Overview

Apttus Configuration & Pricing (CPQ) gives you complete visibility and control of the quote to order phase of your sales process. Beginning in an opportunity, you can select products or services, configure and price them for simple or highly complex scenarios, and produce high quality customer facing quotes and proposals. Apttus CPQ is a web-based, on-demand application that is accessed via a standard web browser through the Internet. Before you install and start using CPQ, you must ensure the minimum system requirements.

About This Guide

Apttus Configuration and Pricing (CPQ) User Guide is designed to provide administrators, involved with the CPQ process in your organization, with information on configuring Apttus CPQ. This guide is designed to cover the most common use cases for the Apttus CPQ Administration and assumes a level of familiarity with basic Salesforce. See the Salesforce User Guide for details on standard Salesforce functionality.

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System Requirements

Apttus CPQ is a web-based, on-demand application that is accessed via a standard web browser through the Internet. Before you install and start using CPQ, you must ensure the minimum system requirements.

For more information, refer to release notes.

Navigating the CPQ Home Page

The CPQ Home page is the starting point of various functions in the application.

The home page consists of the following components:

The Home page view depends on the user settings.

Feature /Section	Description
Search	This feature enables you to quickly search for various items like Quote/Proposals, Templates, Accounts, Contacts, and more. You can further search within the results for specific objects using the Advanced Search feature. A search bar is available at the top of every window within the application, backed by an easy-to-use search engine. Based on the keyword you enter, the system searches against all key elements and retrieves quotes or proposals.
Create New	This button is located on the left-hand side of the homepage. This button provides an easy way to initiate new items like Quote/Proposal, Opportunity, Template, Account, Report, and more.
Tabs	These are individual tabs that provide you a broader view of specific items like Proposals, Templates, Reports, and more.
Dashboard	

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	Dashboards give you a real-time snapshot of corporate metrics and key performance indicators. A dashboard is a group of different charts (or components) that graphically display your custom report data.
My Tasks	Quick summary of tasks that have been assigned to you.
Items To Approve	Quick summary of items that have been assigned to you for approval.
Setup	This link is located on the top right-hand corner of the homepage. The link redirects you to the Force.com home page using which you can perform actions, such as view, customize, add, or edit objects and fields.
Salesforce menu	The drop-down menu provides you with the list of Apttus modules that you can use for configuring, pricing, and quoting.

The CPQ Home page enables you to access quoting information in a variety of ways; Searching, Reporting, Dashboards, and Views.

- Creating Views
  Views are a very powerful, and an easy way to create a virtual file cabinet of your proposals. You can create views based on dates, values, products, any data field, or a combination of fields and also have specific fields displayed. Views are a customized way to display the exact information you are looking for.
- Reports
  Salesforce delivers standard report folders containing reports for each record type. For example, Accounts, Opportunities, Leads, and more. These reports are used as a starting point for your organizations reporting efforts. Salesforce allows all users to run, customize, and create reports. For more information on setting up and managing reports within Apttus, see salesforce.com information related to creating and customizing reports.
- Dashboards
  Dashboards organize key statistics in easy to understand, bottom-line format, allowing you to gain the insight you need to fulfill your business needs.

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Creating Views

Views are a very powerful, and an easy way to create a virtual file cabinet of your proposals. You can create views based on dates, values, products, any data field, or combination of fields and also have specific fields displayed. Views are a customized way to display the exact information you are looking for.

To create views

1. From the Salesforce drop-down menu, select Apttus Proposal Management and go to the Proposals tab.
2. Click the Create New View link.
3. In the **Enter View Name** section, enter a mandatory **View Name** and a **View Unique Name**.
4. In the **Specify Filter Criteria** section, specify the filter options to narrow down to your preferred view for proposals. For example, you can choose to view only those proposals for a specific Account.
5. In the **Select Fields to Display** section, from Available Fields, select one or more options and click the icon to move to Selected Fields.
6. In the **Restrict Visibility** section, select one of the following:
    - **Visible only to me**
    - **Visible to all users** (Includes partner and customer portal users)
    - **Visible to certain groups of users**
7. To save the view, click **Save**.

Dashboards

Dashboards organize key statistics in easy to understand, bottom-line format, allowing you to gain the insight you need to fulfill your business needs.

Apttus provides a robust Dashboard capability at your fingertips, adding an edge to your business solutions. Navigate to the Dashboards tab to customize the page by designating which dashboard type you would like to see from a list. For more information, see Working with Dashboards.

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Reports

Salesforce delivers standard report folders containing reports for each record type. For example: Accounts, Opportunities, Leads, and more. These reports are used as a starting point for your organizations reporting efforts. Salesforce allows all users to run, customize, and create reports. For more information on setting up and managing reports within Apttus, see salesforce.com information related to creating and customizing reports.

Apttus provides you a set of out-of-the-box reports. You may create new reports or customize existing reports. To modify an existing report, run the report and click **Customize**. For more information, see Create a custom report.

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AngularJS based end-user Interface

This version has a new user interface (UI) designed with the AngularJS framework and leading to a better and faster user experience. The new UI will be supported alongside the previous one and can be turned on without any additional configuration.

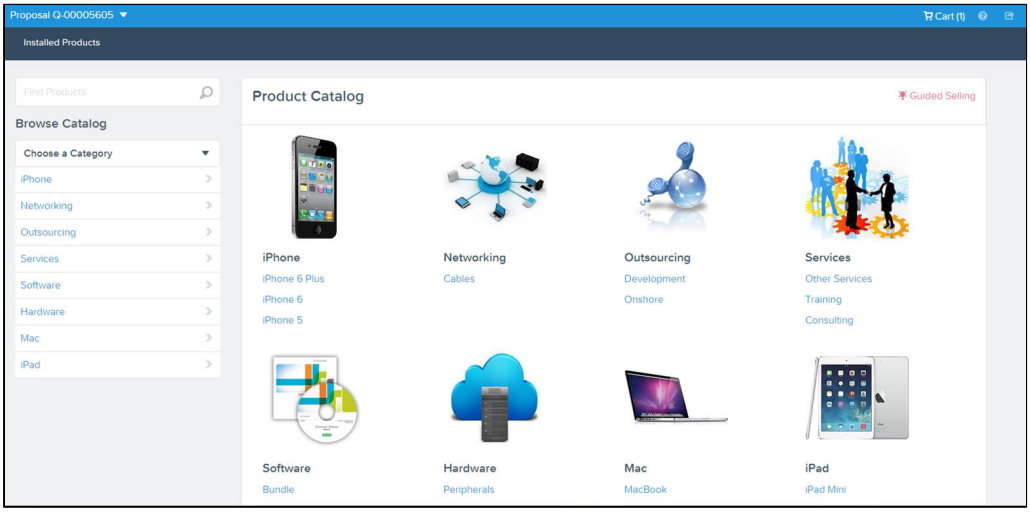
The following UI enhancements have been made in the new release.

- Catalog Page Enhancements
- Attribute Page Enhancements
- Options Page Enhancements
- Cart Page Enhancements

The new user interface allows you to select products, configure their attributes and options, define pricing and make adjustments, select installed products, Change, Swap and Cancel orders on one single, user friendly page.

To create a quote using the new user interface

1. Go to the product catalog page.



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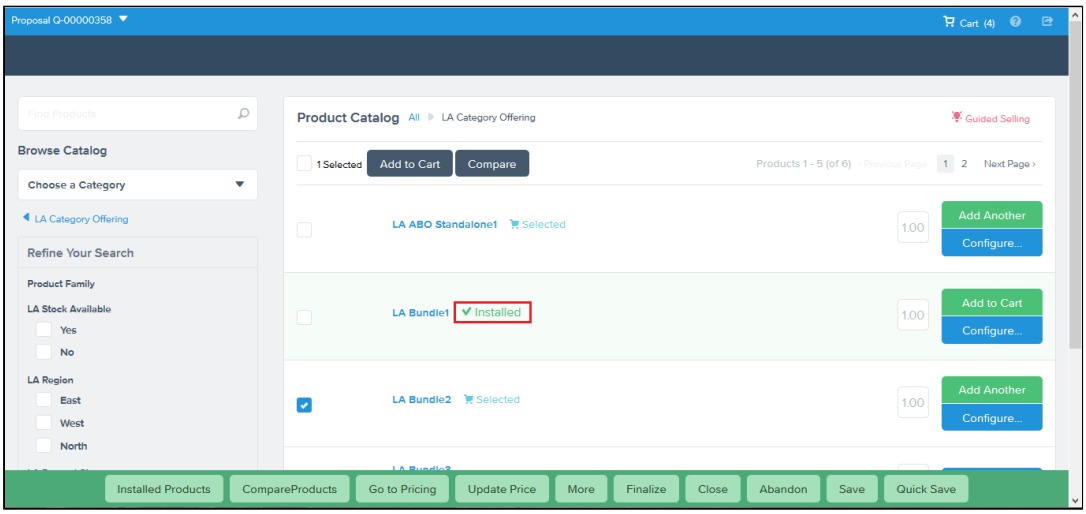
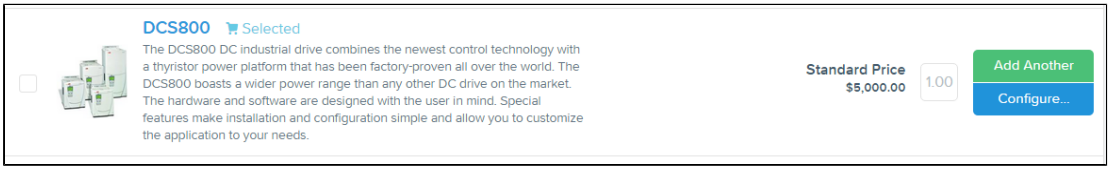
2. You can search for a product or use the Refine your Search feature to filter products, and select the product you want to order. The system displays the products you search using the Search box, Refine Your Search, and Browse Catalog feature collectively. The small indicator, with the label "Installed", next to each product on the Catalog page is used to differentiate between the products which have already been purchased and which products are new for a configure quote.



3. To configure a bundle, click **Configure**. If you select an option product, **Add To Cart** and **Configure** buttons will be disabled, because the option product has to be sold along with the bundle product. Once selected, you can view the exact number of products added in your mini cart on the top-right corner.



4. Configure the attributes of the product.

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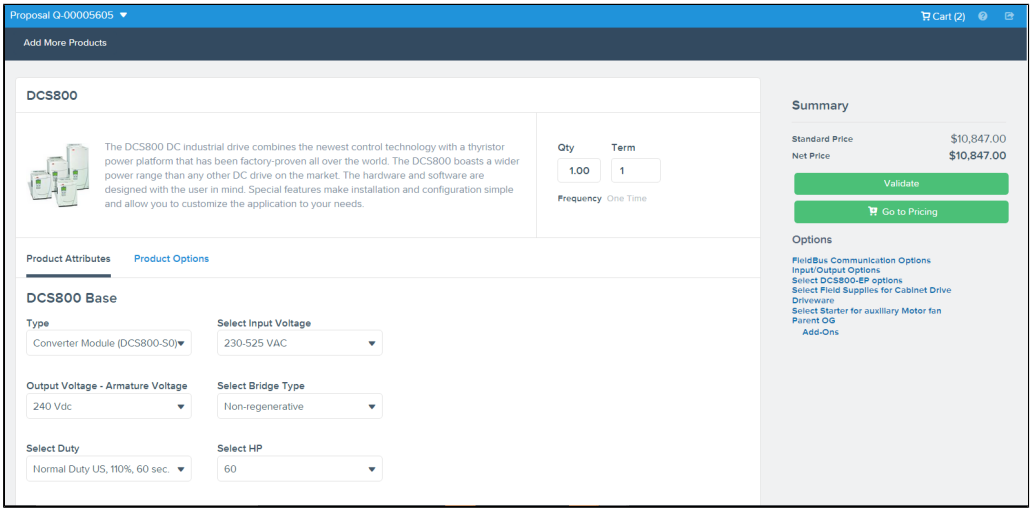
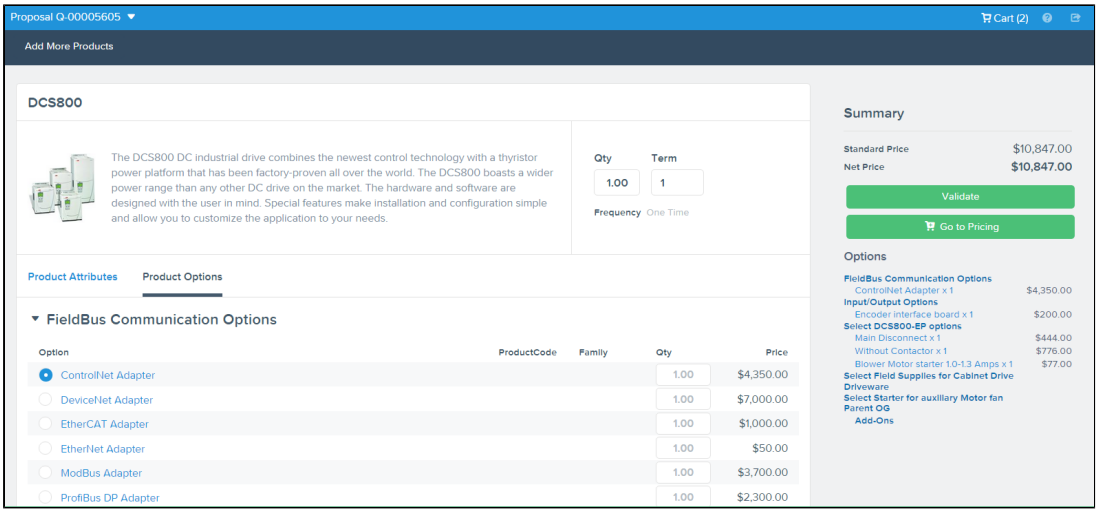
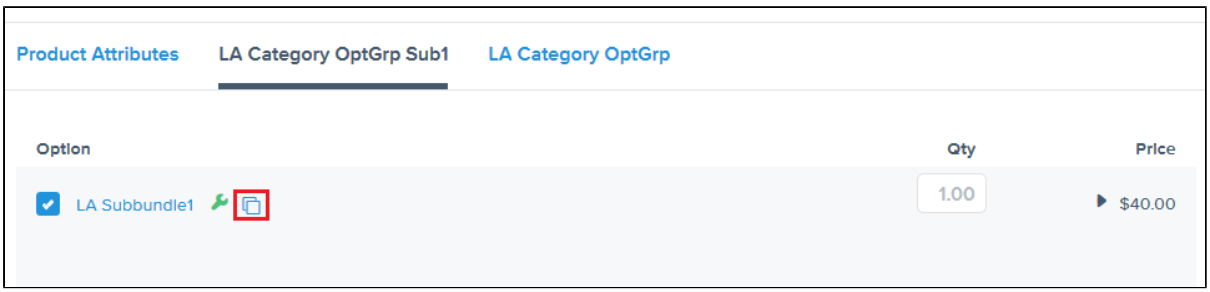


5. Click **Product Options** and select the option you want to order.



In case of sub-bundle products, containing options and its attributes, you can also use the clone icon, available next to your option product to replicate your configuration.



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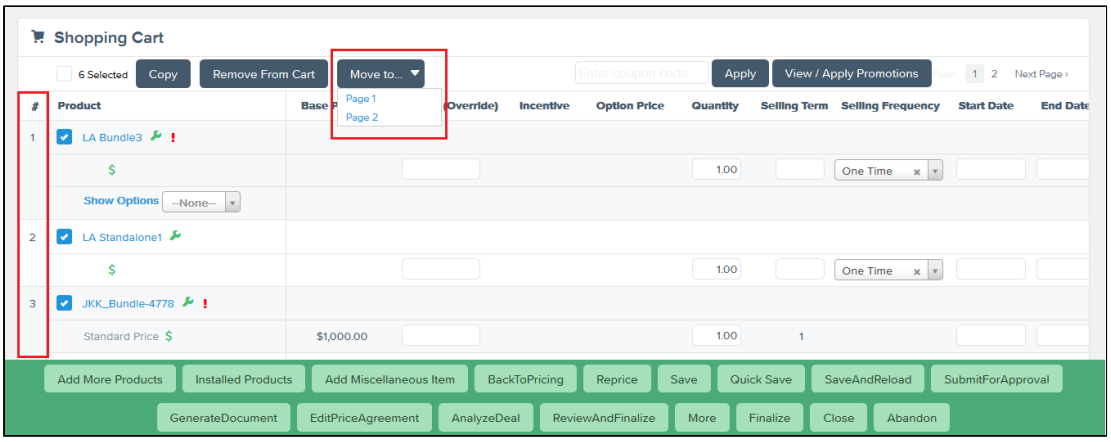
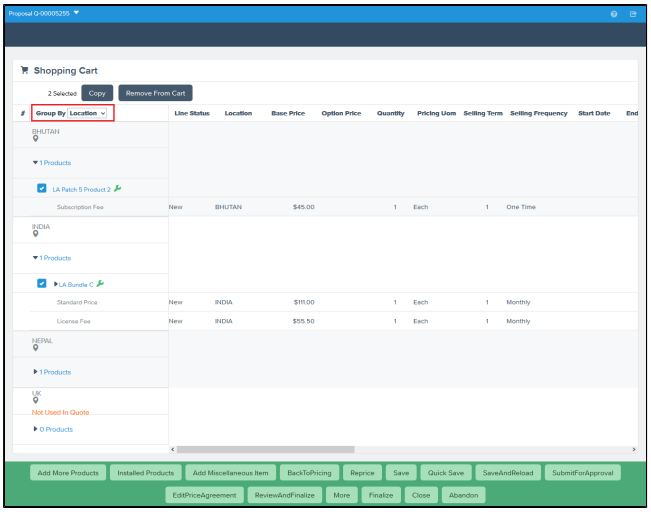
6. Click **Go to Pricing** and define the price of the product on the Cart page. You can also click $ to define the pricing at the line item level.
   You can reorder the line items for a bundle and standalone product on the Shopping Cart using the drag and drop functionality. Use the number column to achieve this. You can either reorder the line items on the same page or even move the line items to an another page if there are more number of products.



   You can also view the products grouped by specific Locations by selecting *Location* from the **Group By** drop-down list.



7. Click **Submit for Approval** to have your line manager review the order or click **Finalize** to save and go back to the quote.

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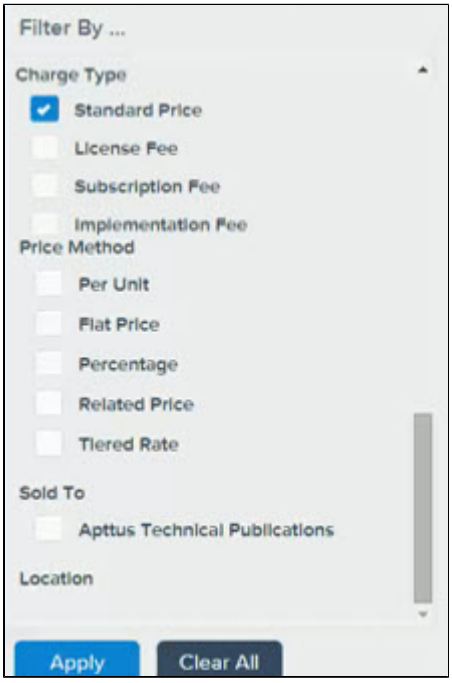
Managing Assets

You can also manage assets on the new CPQ interface. Click **Installed Products** to view all the installed products on a single page.

You can even filter you search. Select one or more parameters from the search criteria on the left work pane and click **Apply**.



To manage an asset

1. Select an asset, and click one of the following buttons.
    - **Terminate** - to cancel a subscription
    - **Swap** - to change one product with another
    - **Change** - to change the subscription dates

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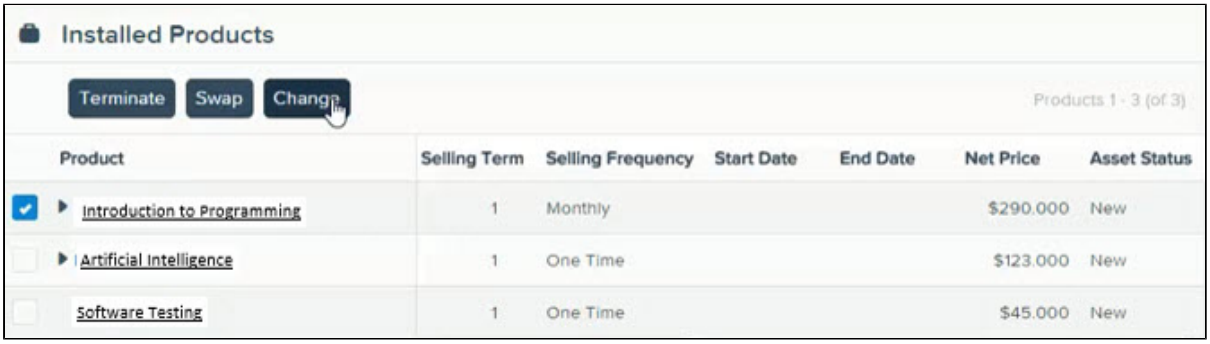

2. Define the values for the fields described in the following table.

Field	Description
Start Date	Enter the date that your customers want the new subscription term to begin.
End Date	Enter the date that subscription term ends.
Quantity	Enter the number of units you want to renew the contract for.

3. Click **Confirm > Go to Pricing > Finalize.**

Applying Multiple Adjustments at the Line Item

You can apply multiple adjustments at the line level either by applying the adjustments in the corresponding columns or clicking $ icon next to the line item from the cart page. This enhances the functionality when you want to apply multiple adjustments to get to the final price for a particular line item.

⚠ Before you apply multiple adjustments to your line item in the pop-up dialog box, ensure that you have not given any manual adjustments against the line item on the cart.

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You can apply the adjustments in the following manner:

- Adjustments on the previous price
- Adjustments on the starting price
- Bucket Adjustments (refer to Bucket Adjustments for details)

Here is an example of the difference between the previous and starting price types:

Extended Price = $100

SR No	Adjustment Applies to	Adjustment Type	Adjustment Amount	Net Price on Cart	Description
1	Starting Price	% Discount	10	90	Create an adjustment line with adjustment applies to as either starting price or previous price (it doesn't matter because it is the first adjustment). The new net price will be $90
2	Starting Price	% Discount	10	80	Now create another adjustment line with adjustment applies to as starting price that applies a 10% discount. The new total adjustment amount will be 100 * (10% + 10%) = $20. The new net price will be $80.

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SR No	Adjustment Applies to	Adjustment Type	Adjustment Amount	Net Price on Cart	Description
1	Starting Price	% Discount	10	90	Create an adjustment line with adjustment applies to as either starting price or previous price (it doesn't matter because it is the first adjustment). The new net price will be $90
2	Previous Price	% Discount	10	81	Create another adjustment line with adjustment applies to as previous price that applies a 10% discount. The new total adjustment amount will be 100*10%*10% = $19. The new net price will be $81. This is because the previous price would be 100 plus the 10% discount.

- When you save the adjustments, Apttus CPQ triggers a Reprice action.
- The number of adjustments applicable for a line item is defined in the **Max Adjustment Lines** custom setting, available under Config System Properties in the admin guide.
- You can restrict adjustment types using Product Attribute Rule (PAR) at the line item level on the Cart Grid UI. This capability is supported for Adjustment Type picklist.

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Cart Locking for Concurrent Access

Cart locking helps prevent data loss while a sales rep is working on a configuration. When a sales rep is working on a configuration (in edit mode), any other user who tries to access the cart at the same time will get redirected to a read-only view of the cart. The user in read-only mode can gain edit access only after the sales rep saves or finalizes or abandons or closes the cart.

Ensure that your administrator has configured the necessary custom setting before using Cart Locking.

While a user is in edit mode, if another user requests control by clicking **Request Edit Access**, the user currently in edit mode gets notified through an email with the message: “<<user in read-only mode>> has requested to edit the cart. Would you like to grant access?”

In an edit mode, after the user saves, closes, finalizes, or abandons the current cart, an email notification is sent to the user who was waiting to get the edit access of the cart.

The email notifications are sent in the following format:

Action on the cart	**Email notification content**
Claim Edit Access	User <<name in read-only mode>> has requested edit access to <<proposal name>>. To grant this user with access, please either: save, close, finalize, or abandon your configuration.
Save or Close	<<User name - edit mode user>> is done configuring. You can claim edit access to the cart by clicking the **Claim Edit Access** button on the cart.
Finalize	<<User name - edit mode user>> has finalized the configuration. You can now view and edit this finalized version by clicking the **Claim Edit Access** button on the cart.
Abandon	<<User name - edit mode user>> is done configuring. You can claim edit access to the cart now by navigating to the quote header page and clicking **Configure Products**.

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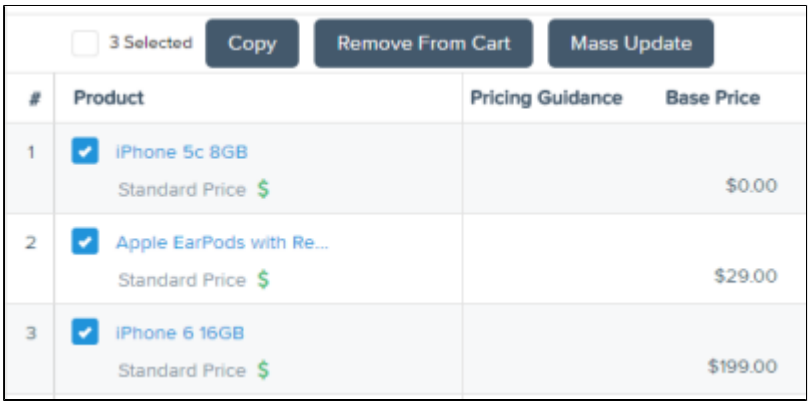
⚠ Cart locking is available only in the Angular UI. Enabling it for the classic UI may result in unexpected issues.

Mass update product fields

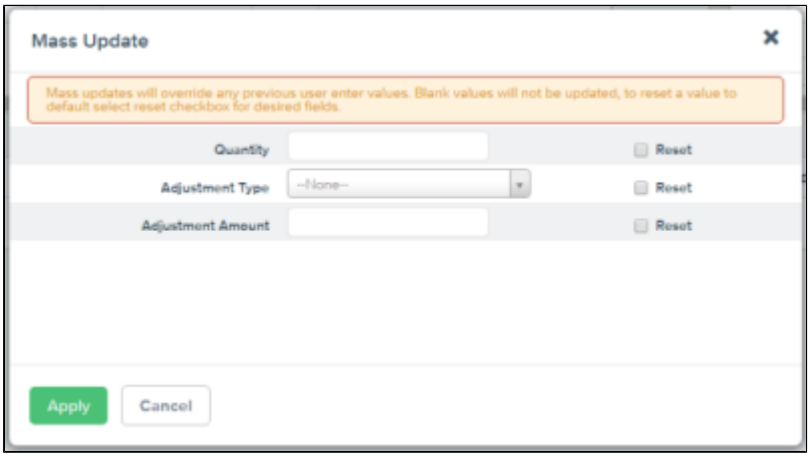
Mass update allows you to bulk update fields, such as quantity, adjustment type, and adjustment amount for one or more than one products at a time.

To mass update product fields

1. From the cart page, select the desired product(s) and click **Mass Update.**



2. In the Mass Update popup, specify the desired value for the fields and click **Apply**.



By default, you see the following fields in the Mass Update popup.

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- Quantity
- Adjustment Type
- Adjustment Amount

You can either specify the value for a field or select the **Reset** check box. Mass Update will override any existing user entered value. If you keep a specific field blank and click **Apply**, no action is taken on that field. When you select the **Reset** check box, system updates the field to its default value. Using Mass Update, you can update any line item field, including a custom field which is editable. You need to ensure that **Allow Manual Adjustment** for the corresponding PLI is set to *True*.

- To customize the fields displayed in the Mass Update popup, admin can navigate to **Config Settings > Display Column Settings**. Select *Mass Update* from the **Display Type**, and *ngFlow* from **Flow** drop down.
- You should not use Mass Update along with Multiple Adjustments.

Favorite Configurations on the Cart

A sales rep can use private and public favorite configuration for bundles and sub-bundles. Favorite configuration enhances the product configuration and quoting process by providing the user an ability to create, share, and import favorite configurations or its designs.

Vertical industries in the quote to cash domain require a capability of favorite configurations. This feature is useful for the following scenarios:

- Speed up quoting process – you can save frequently configured solution, which is complex in nature for its re-use at a later time.
- Dynamic bundles – as a product manager, you have the ability to create, save and import a saved configuration as a whole.

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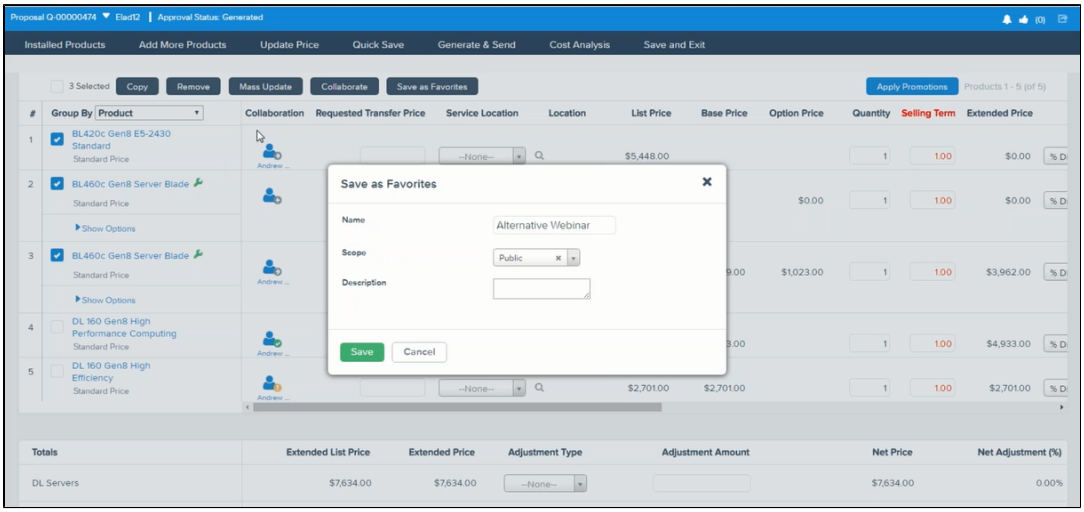
Saving your Favorite Configurations

As a sales rep, you can save the favorite configuration as a solution design, which includes configuration and standalone components to the library. The saved configuration can then be re-used at a later time. You can add a favorite to the cart within the same flow as you would add any other product from the catalog. Private configuration is saved to your library so that you can re-use it at a later time. Product Manager or Sales Admin can set pre-defined configuration for all users or group of users, making such configuration as Public configuration.

A new button called **Save as My Favorite** is available on the Cart to save the configuration for a particular Quote/Proposal. When you click **Save as My Favorite**, a pop-up dialog box is displayed. You can customize the fields displayed this dialog box by using Favorite Configuration Settings. The following table explains the different fields inside this dialog box.

Field	Description
Name	Enter a suitable name for your favorite configuration. This name is displayed as a record under your Favorites category.
Scope	Choose an option for the visibility of your configuration record. The available values are, *Public* and *Private*. If you set this to *Private*, this record is visible to only the owner of the record. If you set this to *Public*, this record is accessible to all the users. The default value is *Private*.
Description	Enter details about your favorite configuration.



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These favorite configurations are saved on Price Lists and can be used across multiple quotes.

The favorite configurations records are visible on the Catalog page only after you save your favorite configuration record and reconfigure the Cart.

Reusing your Favorite Configurations

As a sales rep, you can add saved a configuration to the quote. You can also add multiple configurations. When you add a saved configuration to the quote, the system creates a copy of the original design. This is useful in case if you want to edit the design on the quote without impacting the original design.

After you have saved your favorite configurations for a particular Price List and have associated this Price List with your Quote/Proposal, a separate category, named **Favorites**, containing your favorite configurations is displayed on the Catalog page. The system creates a clone of the favorite configuration records every time you associate the Price List with a Quote/Proposal.

ⓘ You can set your favorite category to be displayed first when you have multiple offerings, using a custom setting **Show Favorite as First Category**. You can find this setting under Config Select Products Settings Detail page. For more information, see Ordering Favorite Category on the Catalog page in the Admin Guide.

Note that none of the rules (Constraint rules, Validation rules, and more) are carried forward in the cloned favorite configuration records.

The favorite configuration records are also searchable like the normal products on the Catalog page using **All Favorites** option from the Search drop-down list. While importing a favorite, you can also control whether you want to include discounts to the cart or not. The price of the favorite product is derived from the Price List associated with the Quote.

ⓘ **Note**

Ensure that the primary charge type is same on both the price lists.

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For every favorite configuration record, Add to Cart action button along with the drop-down list containing **Exclude Adjustments, Delete and Publish** buttons is displayed on the Catalog page.

- **Add to Cart** – this will simply put all the cloned Line Items (including Options, Attributes, and manual adjustments) of your favorite configuration record in the Cart.
- **Exclude Adjustments** – this will fetch details of all the Line Items (including Options and Attributes, excluding manual adjustments) and add them to the Cart. The manual adjustments that you have applied to the original favorite configuration record are not carried forward to the cloned favorite configuration record.
- **Delete** – this will delete a favorite configuration record. This button is dependent on the privacy defined for your favorite configurations . As a user, you can view all the public configuration records and can delete only those records for which you are the record creator or owner.
- **Publish** – this will publish your favorite configuration record to another Price Lists. From the **Choose Price Lists** dialog box, you must select the price lists to which you want to publish your favorite configuration record. You can publish a favorite configuration record using the **Publish** button on your favorite configuration record in Salesforce also. Once published, this record shows up under your **Favorites** category of the Quote/Proposals that use the price lists containing these favorite configuration records.

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You can control the fields displayed in the pop-up dialog box when you click the Product Name on the Catalog page. Similar to custom settings defined for normal products, you can create a separate record under **Object Summary Settings** for the favorite configuration record.

Name the new record as *Favorite Configuration* and select *FavoriteConfiguration__c* as the **Object Name**. Refer to Object Summary Settings in the admin guide.

Multiple Adjustments Using Favorite Configuration

You can configure and add a product to the cart and then apply price adjustments to it. Save this product configuration as Favorite on the cart. Hence, next time you can leverage the favorite configuration to add multiple adjustments to products in the cart. This helps you save time and expedite the process of applying price adjustments using the Favorites on the Product Catalog page.

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Working with Quote/Proposals

- Creating Quote/Proposals from Opportunities
  Apttus provides you the capability to enter necessary information via a user-friendly interface to prepare a quote/proposal request or a draft.
- Quote Lifecycle Collaboration
  Quote Lifecycle Collaboration allows multiple users to work on different parts of a quote simultaneously and then merge the data and finalize in a single quote.
- Cloning existing Quote/Proposal
  You can clone the existing Quote/Proposal using the Clone button on the Quote detail page.
- Creating Quick Quotes
  You can use Quick Quote mode to quickly select numerous products from the product selection page directly from an opportunity with just one click.
- Including Product Footnotes in Proposal Documents
  Product footnotes enable you to dynamically include static *footnote* content in your quote /proposal documents, based on the products that are included in the quote.

Creating Quote/Proposals from Opportunities

Apttus provides you the capability to enter necessary information via a user friendly interface to prepare a quote/proposal request or draft.

To complete the quote/proposal, you must enter details relevant to a proposal. Some of the fields identified with (red vertical line) are required fields, without which you cannot save the proposal record. If required details are not entered or incorrect details are entered, the system displays validation rule errors at the top of the page highlighted in red.

To create a quote/proposal

You must be logged into Salesforce.com. A series of colored tabs are aligned along the top navigation area.

1. From the Salesforce.com application menu, select **Apttus Proposal Management**.

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2. Go to the Proposal tab and click **New.**
   - OR -
   Go to the Opportunities tab and click the **Create Quote/Proposal** button.

   > If you have installed CPQ for the first time, use Edit Layout to drag the button to the layout.

3. From Record Type of new record, select the desired record type and click **Continue.** Apttus can accommodate any type of Quote/Proposal template (Budgetary, Final, and more). The out-of-the-box system only has the Proposal and RFP type. If quote/proposal types are not set up or if you have access to only one quote/proposal type, skip to the next step.
4. Type a mandatory **Proposal Name** and enter a mandatory Opportunity.
5. Enter a Price List and an Account.
   The Price List determines the categories and products you see in the configuration. Account is auto-populated if the proposal is created from an opportunity.
6. An Opportunity may have many proposals or quotes. To set this record as a primary quote, select the **Primary** check box.
7. In **Primary Contact**, enter the primary contact person name for the account.
8. From Approval Stage, select the stage of the proposal. The approval stage determines the actions available to you for a quote/proposal. For detailed information on various approval stages and the actions available, refer to Glossary of Apttus Approval Stages.
9. To enable the final quote or proposal generation from the current proposal, select **Ready to Generate**. The **Ready to Generate** checkbox is selected by default. If it is not selected, the **Generate** button does not appear in the proposal.
10. To attach and send the proposal in an email to a configured account, select Ready to Present. The Ready to Present check box is selected by default. If it is not selected, the Present button does not appear in the proposal.

    > Before saving the quote/proposal, ensure that you have set the **Pricing Date** that falls in between PLI expiration and effective dates. Otherwise Quote cannot pick the PLI with a pricing date from an expired PLI.

11. Click **Save**.

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You have created the draft proposal which you can use for searching and reporting. Various new related lists are enabled on the quote/proposal page. To know more, refer to Glossary of New Sections.

Navigate to the proposal you just created, and proceed with product selection.

Create quotes from opportunities inheriting the related line items

You can create a draft quote with the selected service product and its related line items (asset line items) and then synchronize it with the opportunity. After clicking the synchronize with opportunity, you can also cascade the related equipment lines to the opportunity and forecast the service revenue in conjunction with the opportunity.

Similarly, you can create a renewal quote that carries over the related line items to the quote or cart.

Quote Lifecycle Collaboration

Quote Lifecycle Collaboration allows multiple users to work on different parts of a quote simultaneously and then merge the data and finalize in a single quote.

Quote collaboration feature empowers your sales reps to work together on the same quote. A sales rep starts the configuration process, and assigns configuration request to Queue or to other sales rep (called collaborator) where he needs help. A Sales rep can assign multiple line items to a collaborator. A Sales rep can also assign different line items to different collaborators. Through the collaboration request, Quote Lifecycle Collaboration allows the sales rep and collaborators to communicate via SalesForce Chatter.

The Collaborator can then work on his piece of the configuration and submit his changes. Once Sales rep receives such configurations from different collaborators, he can accept or reject the configuration at individual line item level.

When should it be used

- When a sales rep needs help with configuration or pricing from a number of people who will work simultaneously on their respective parts.
- Quote collaboration is designed for working on specific products and to not send whole configurations to a certain collaborator.

Types of collaboration

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- Peer to peer: To easily send line items to a collaborator. This copies over all the information on the relevant line items. Ideal for a situation in which the sales rep needs help with pricing and configuration.
- Multi-tier: To send only specified fields from chosen line items and merge back specific fields as well. Ideal for situations for which creating a cost structure is necessary, when using transfer price mapping or any other collaboration scenario that requires a specific update of certain fields.

Key Capabilities

- Assign multiple collaboration requests from a single configuration.
- Monitor and administer collaboration requests.
- Review submitted child carts.
- Reassign collaboration requests to new users.
- Sequential assignment: A->B->C.
- Have a back and forth pricing/cost/transfer price negotiation between a sales rep and a collaborator.

Role wise definition

Role	Description
Sales Rep	A sales rep initiates a collaboration process. Typically he is a member of the sales team and has a customer facing role. The sales rep is in charge of sending out a single final quote to the customer.
Collaborator	A collaborator is a product owner, manager, factory manager, or another user who has the knowledge about particular configuration.

Process flow

When the sales rep initiates the collaboration request from the cart page, a task record is created on the ‘business object’ with the status as *Assigned*. The notification is sent out to the collaborator. Once collaborator receives the assigning notification, he can work on his part of the configuration. Optionally, the collaborator can see the parent cart in a read-only mode. Once collaborator has

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finished working on his piece of the configuration, he can submit the configuration. Task status is now changed to *Merged*. The notification is sent out to the sales rep. Once the Sales rep receives the notification that a configuration has been submitted, child cart of the collaborator is merged with his own parent cart. A Sales rep can accept or reject the configuration changes, and can finalize the cart.

The following table describes the Collaboration status and the actions associated with it.

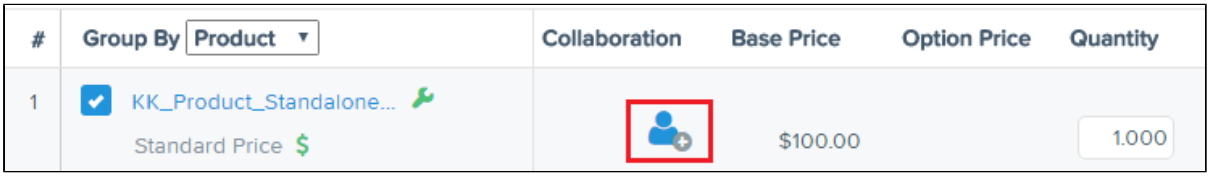
Collaboration Status	Description
Assigned	Sales rep has assigned the configuration request to the collaborator. This status is shown with an orange exclamation mark when the sales rep assigns the request to the collaborator.
Submitted	Sales rep has submitted the configuration request to the collaborator.
Completed	Collaborator has submitted the configuration back to the sales rep.
Accepted	Sales rep has accepted the configuration and has merged with the parent cart.

Assigning the configuration to the Collaborator or Queue

From the cart page, you can request the collaboration from other users.

To assign the collaboration request to a collaborator or queue

1. At the line item level, click Collaborate icon for your corresponding product. You can also select multiple products and click the **Collaborate** button at the top.
   You can collaborate on bundle as well as a standalone product.



When you click Collaboration icon, **Quote Collaboration** popup is displayed.

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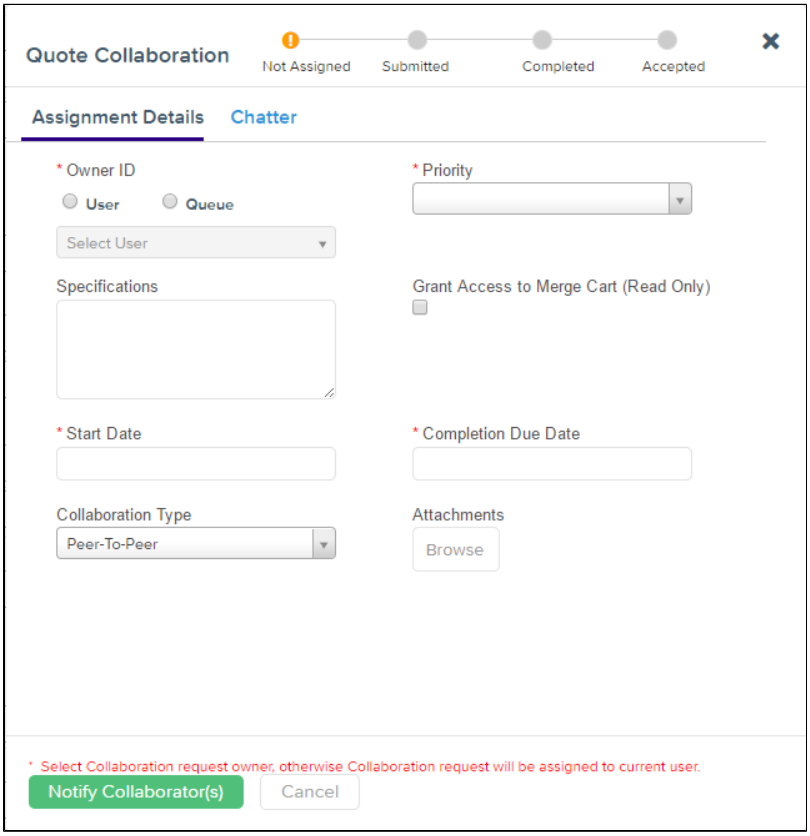

In the **Quote Collaboration** popup, specify the following details.

Field Name	Description
User or Queue Assignment	Select the user (collaborator) or queue to whom you want to assign the configuration.
Collaboration Type	• *Peer-To-Peer*: Same business units collaborate for the configuration. When peer-to-peer collaboration type is selected, the system copies the entire line item over to the child cart. • *Multi-Tier*: Different business units collaborate for the configuration. In multi-tier collaboration type, a sales rep from the different business units collaborates for the configuration.
Specifications	

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Field Name	Description
	Specify the information that you want to convey to the collaborator in this text box.
Start Date	Specify the start date by which the collaborator should start the configuration.
Completion Due Date	Specify the completion date by which the collaborator should submit his configuration.
Priority	Specify the urgency of this request.
Grant Access to Merge Cart (Read Only)	Select this check box to allow the collaborator to view the entire cart in a read-only mode. This can be useful when you want the collaborator to see the entire cart to gain a better understanding of the overall offering. This functionality is yet not implemented.
Attachments	Attach the additional documents or images.

Click **Notify Collaborator(s)** to send the notification email to the collaborator. The collaboration status is updated to *Submitted*.

The collaborator can now start working on the assigned configurations as explained in the Working on the configuration request section.

Working on the configuration request

To start working on the configuration request assigned to the Collaborator, he can access the collaboration requested configuration by clicking on the link given in the email that he receives. The collaborator can also access the collaboration request from **All Tabs > Collaboration Requests**. When collaboration request is assigned to a Queue, each queue member receives the email notification (depending on queue setup).

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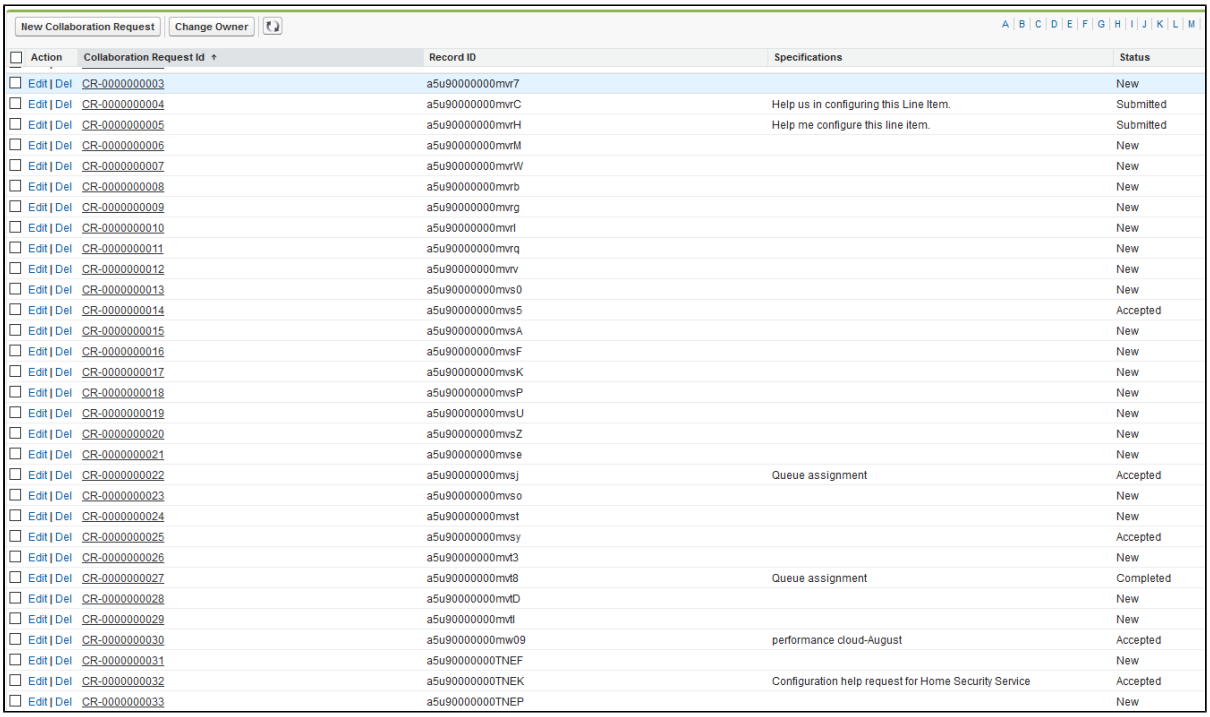
When the sales rep deletes the line item associated with a work in-progress collaboration request, the corresponding request gets deleted automatically. Hence, the collaborator cannot access and continue working on the collaboration request even by clicking on the email link. The deletion action also resets the configuration status on the cart from `In Collaboration` to `Saved`.

1. The Collaborator can click **Collaboration Request Id** to access the specific collaboration request. From the Collaboration Request Details screen, he can click **Configure Products** button to start working on his piece of the configuration.
   Collaborator is redirected to the cart page to perform the configuration tasks.



New Collaboration Request | Change Owner | A | B | C | D | E | F | G | H | I | J | K | L | M

Action	Collaboration Request Id	Record ID	Specifications	Status
Edit | Del	CR-0000000003	a5u90000000mvr7		New
Edit | Del	CR-0000000004	a5u90000000mvrC	Help us in configuring this Line Item.	Submitted
Edit | Del	CR-0000000005	a5u90000000mvrH	Help me configure this line item.	Submitted
Edit | Del	CR-0000000006	a5u90000000mvrM		New
Edit | Del	CR-0000000007	a5u90000000mvrW		New
Edit | Del	CR-0000000008	a5u90000000mvrb		New
Edit | Del	CR-0000000009	a5u90000000mvrg		New
Edit | Del	CR-0000000010	a5u90000000mvrl		New
Edit | Del	CR-0000000011	a5u90000000mvrq		New
Edit | Del	CR-0000000012	a5u90000000mvrv		New
Edit | Del	CR-0000000013	a5u90000000mvs0		New
Edit | Del	CR-0000000014	a5u90000000mvs5		Accepted
Edit | Del	CR-0000000015	a5u90000000mvsA		New
Edit | Del	CR-0000000016	a5u90000000mvsF		New
Edit | Del	CR-0000000017	a5u90000000mvsK		New
Edit | Del	CR-0000000018	a5u90000000mvsP		New
Edit | Del	CR-0000000019	a5u90000000mvsU		New
Edit | Del	CR-0000000020	a5u90000000mvsZ		New
Edit | Del	CR-0000000021	a5u90000000mvse		New
Edit | Del	CR-0000000022	a5u90000000mvsj	Queue assignment	Accepted
Edit | Del	CR-0000000023	a5u90000000mvso		New
Edit | Del	CR-0000000024	a5u90000000mvst		New
Edit | Del	CR-0000000025	a5u90000000mvsy		Accepted
Edit | Del	CR-0000000026	a5u90000000mvt3		New
Edit | Del	CR-0000000027	a5u90000000mvt8	Queue assignment	Completed
Edit | Del	CR-0000000028	a5u90000000mvtD		New
Edit | Del	CR-0000000029	a5u90000000mvtI		New
Edit | Del	CR-0000000030	a5u90000000mw09	performance cloud-August	Accepted
Edit | Del	CR-0000000031	a5u90000000TNEF		New
Edit | Del	CR-0000000032	a5u90000000TNEK	Configuration help request for Home Security Service	Accepted
Edit | Del	CR-0000000033	a5u90000000TNEP		New

2. Once collaborator completes his configuration for the line item, he must submit his configuration back to you by clicking **Submit For Merge**. Additionally, the collaborator can add another product to his cart, which he feels should be part of the overall configuration. He can then send the configuration back to the sales rep. In the parent cart, sales rep sees the newly added product as a separate line item.
   Upon submission, the sales rep (who requested the configuration) will receive an email notification. Collaboration status is now updated to *Completed*. The updated status is reflected in the Collaboration Request as well as in your parent cart.

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The Collaborator can create a sequential collaboration. For example, Sales Rep can assign a collaboration request to Collaborator A, who in turn can further assign the same collaboration request to Collaborator B. B's completed configuration will merge onto A's cart, and A's completed configuration will merge onto the Sales rep's cart respectively.

When collaboration request is assigned to a Queue, collaborator does not see **Configure Products** button. Follow the steps mentioned in the below procedure to see the **Configure Products** button.

Taking ownership of the collaboration request assigned to a Queue

1. Go to **All Tabs > Collaboration Requests**.
2. From **View** drop-down, select the appropriate Queue and Click **Go!**.
3. Click the **Collaboration Request Id** to view the details of the configuration request.
4. In the **Collaboration Request Detail** screen, use the **Owner** field to change the ownership from Queue name to the Collaborator username.
5. In the **Collaboration Request Detail** screen, click **Configure Products** button under **Action** column to work on the configuration request.

Unless the User owns a particular Collaboration Request, he does not see the Configure Products button on the detail layout. Even if the Collaboration Request is assigned to a Queue and the current logged-in User is a member of that Queue, he does not see the Configure Products button unless he accepts the collaboration request.

Merging the configurations in the parent cart

Once the collaborator has submitted his completed configuration, you can decide either to accept the configuration or ask for updates to the current configuration.

1. Click the collaboration icon to see the Quote Collaboration pop-up again.

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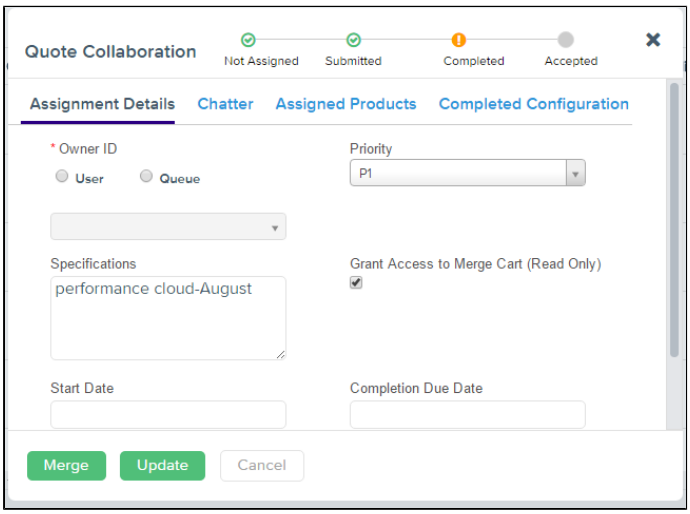

2. Perform any one of the following actions:
    a. Click **Merge** to accept the configuration submitted by the collaborator and to merge this line item with the parent cart. The status is updated to *Accepted*.
    b. In case if further collaboration is required, you can update the fields in the collaboration popup and click **Update** to assign the collaboration task back to the collaborator. You can use the same configuration request to send the configuration back and forth to the collaborator. This is useful in a scenario when you are negotiating a transfer price or you need to further request additional changes in the configuration submitted by the collaborator.

As a Sales Rep, you have the ability to make changes to the configuration request details and you can re-submit the same configuration to the same collaborator or to someone else, without losing previously merged configuration. When you change the configuration request owner and re-assigns the same configuration to someone else, the previous collaborator receives the cancellation notification email.

1. You can review the completed configuration submitted by the collaborator before merging with the parent configuration. You have the ability to review the submitted configuration and decide whether to merge the configuration or not. You can review the submitted configurations from *Completed Configuration* tab. When you navigate to **Completed Configuration** tab and click **More details**, you can see the child configuration in a read-only mode.
2. Complete your pending configurations and finalize the cart. Note that **Finalize** button is enabled only after you have merged the collaboration request in your parent cart.

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When you update a Completed or Merged configuration, the status of such configuration reverts to *Submitted*, and the Collaborator receives an email notification.

While using Cost and Profitability functionality with Quote Collaboration, if the collaborator and the Sales User are from different business units and the collaborator sends a price which becomes one of the cost elements of the Sales Users cart and this price is negotiated, you must use multi-tier as the collaboration type. In Peer-to-peer collaboration, the only difference is that the merge copies over entire line items rather than merging field values based on transfer price map and merge field set.

Consider that a parent cart has a product and that product is already collaborated by the Collaborator. Originally collaborated line item should get merged as per the transfer price map and merge field set. The child cart now has one line item containing the product. If the Quote Collaborator added the same line item and performs a merge operation, the line item would be overridden during the merge operation. After the merge operation, if two line items have the same product, and the collaborator performs a merge operation, the line items are saved as individual records.

See Cost and Profitability section in the admin guide for more details.

Cloning existing Quote/Proposal

You can now the existing Quote/Proposal using the **Clone** button on the Quote detail page. Cloning copies all the information from the existing quote, including field data, line items, and proposal header information. If an approval trigger is set on the existing quote, the approval status and trigger is not copied to the cloned quote. You must re-trigger approval on the cloned quote.

The new cloned quote will retain all the information of the parent quote, including:

- Proposal header details
- Configuration line items (if parent quote is not finalized)
- Proposal line items (if parent quote is finalized)
- Attributes of line items

The following information is not retained from the parent quote:

- Activity history
- Notes and Attachments

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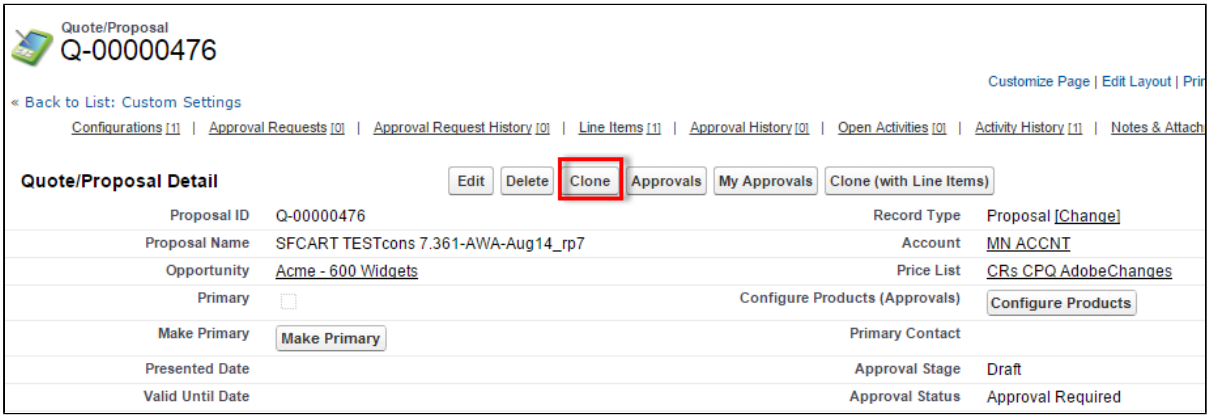
Whenever an account executive needs to have multiple draft options of the same quote or needs to make changes (example, extend the quote expiry date) to a finalized quote before sending it out to the customer, he/she can clone the quote with the line items and with or without the approval status.

> You can Generate a quote when the **Status** of your Product Configuration records is *Saved* or *Ready For Finalization*.

To clone an existing quote

1. Navigate to your existing quote.
2. Click the **Clone** button.



3. Fill in the required details in the cloned quote and click **Save**.

When you clone a quote with its line items, new quote is generated with a unique quote number whose **Status** will be *Draft* and **Configurations** status will be *Saved*.

The table below details the changed behavior when you clone a Quote/Proposal:

Behavior in New version	Behavior in Old version
A new custom setting **Clone With Approval Status** to alter the Approval status of a cloned Quote /Proposal.	No custom setting to control the cloning of Approval status of a Quote/Proposal.

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Behavior in New version	Behavior in Old version
Approval is not triggered for the header and line items which have already been approved in the previous Quote/Proposal unless you make any change to the new cloned Quote/Proposal and click **Save**. The values in the **Approval Status** on the header and line item fields are blanked out, except for the Quote/Proposal which has Approval Status as *Approved*.	All the header and line item level fields, which satisfy the entry criteria for approvals were re-evaluated for approvals, irrespective of the approval status of the parent and related line items. All the values were blanked out and the value in the **Approval Status** was not carried forward to the cloned quote after cloning.

In cases when the status of Quote/Proposal is *Not Submitted*, *Pending for Approvals*, *Cancelled* or *Rejected*, its corresponding **Approval Status** is cleared while cloning. The Same rule applies for line items. This indicates that you might want to trigger an approval request upon the newly cloned Quote/Proposal.

To enable the above enhancement, go to **All Tabs (+) > Admin** and create a new entry with the following details:

Field	Description
Name	Enter *APTS_CloneWithApprovalStatus* as the name of the entry.
Value	• *True*: Enter this value if you want to clone the value in the **Approval Status** of an approved Quote/Proposal in the newly cloned Quote/Proposal. • *False*: Enter this value if you do not want to carry forward the value of the Approval Status in the newly cloned Quote/Proposal.

Creating Quick Quotes

You can use Quick Quote mode to quickly select numerous products from the product selection page directly from an opportunity with just one click.

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Quick Quote has enhanced search capabilities that include targeting standard and custom fields, advanced search, automatic pre-filters, saved list views, and can be sorted. When you have a long list of individual products, you can use the Select All function to select all individual products together.

- Before you can create a quick quote, you must have an existing opportunity with a price list associated to it.
- Only auto-inclusion constraint rules can be used with Quick Quote. Other constraint rules will be ignored.

To create a quick quote

1. Navigate to the Opportunities tab, select an existing opportunity, and click Create Quick Quote. The product selection page is displayed with products from the price list associated with that opportunity.
2. Select a product from the list and click Select.
3. Do one of the following:
    - To add more products, click Add More Products.
    - To add miscellaneous line items without any particular product, click Add Miscellaneous Items.
    - To recalculate the pricing after making changes, click Reprice.
    - To save the product configuration and return back to the quote/proposal page, click Save.
    - To save your changes and continue pricing, click Quick Save.
    - To proceed to the final stage of configuration, click Review & Finalize.

Your quote is ready using the Quick Quote mode. Now, you can price, review, and finalize the shopping cart and proceed to the quote process.

Including Product Footnotes in Proposal Documents

Product footnotes enable you to dynamically include static *footnote* content in your quote/proposal documents, based on the products that are included in the quote.

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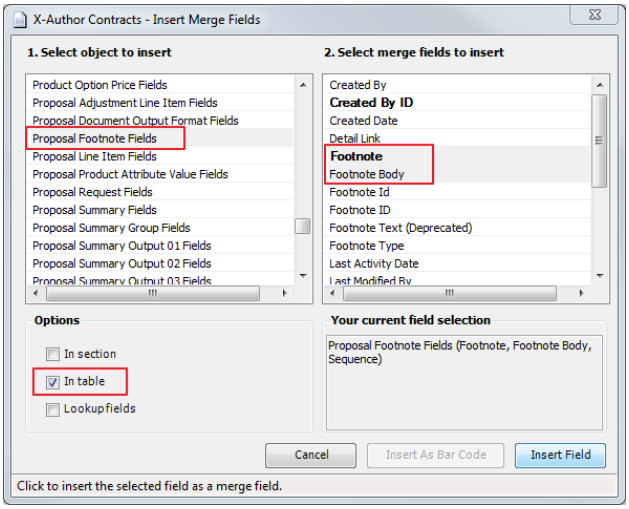
To include product footnotes in Proposal documents

1. Login to X-Author Contracts, select the **X-Author Templates** tab and check out (or create a new) a proposal document template.
2. Place the cursor in the template where you want the footnotes and click **Insert Merge Fields** .
3. Select Lookup Fields, and then select **Product Footnote Fields** > **Footnote** > **Text** and click **Insert Field**.



   The merge field is entered into the document template.

4. Click Check-In and ensure that Type is **Proposal** and that the selected Agreement Types also match those of the proposals you will use the template with.

When you Finalize your shopping cart and subsequently Preview or Generate the proposal document, you should see the text associated with the product footnotes — for the products included in the Line Items — displayed in the document.

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Adding Products to the Shopping Cart

The Quote creation process involves, product selection, configuring attributes, configuring options, and pricing the products. Pricing can be done only after you have added products to the shopping cart.

The Quote/Proposal detail page is the gateway to select and configure your products, and later price and finalize them to generate a Quote/Proposal.

The Quote creation process comprises the following four steps:

- Select- This stage of the process enables you to select products from the Catalog page. You can select and add Standalone and Bundle products directly to the shopping cart or choose to configure products that have attributes or options associated with it. While doing this, you can also view the Product Summary by clicking a specific product, which lists the Product Code, Product Description, and whether a product has attributes and options associated with it.
- Configure - On the Catalog page, if you choose to configure products, you can select attributes from the Attributes page or select and options from the Options page.
- Price - After you are done with your product selection or configuration, you can price them on the Shopping Cart page.
- Finalize - Once your cart is complete, you can finalize the cart and your quote is ready to be generated.

Note: Depending on your profile or any other business use case set for your organization, when you click **Configure Products**, you might view different versions of the following:

- Catalog page, Attributes page, Options page, Cart page, and Assets page.
- Action buttons like Next, Reprice, Save, and more.
- Columns on the Cart page.
- Searching a Product from the Catalog
  The Catalog page enables you to select and configure products. This page allows multiple ways to search and choose the product you are looking for.
- Configuring a Product from the Catalog
  If you have attributes and/or options associated with your products, you can configure them from the Catalog page.

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- Pricing Products on the Shopping Cart
  In the Pricing stage, you can price the selected products and apply adjustments such as markup value, discounts, and more from the Cart page.
- Finalizing a Product
  This is the final step before taking the finalized set of products and prices back to the Quote /Proposal.
- Using Guided Selling
  Guided Selling is a process that helps you to choose the product best fulfilling your customer's needs. The goal of guided selling is to provide you a way to figure out which product to sell to a customer.
- Using Refine your Search
  When you are selecting items from the Product Catalog, *Refine Your Search* enables you to narrow the list of products to those that match your search filter questions.
- Using the Product Comparison Feature
  Product comparison allows you to compare features of multiple products on the catalog page enabling you to narrow down to products that best fit your customer's need

Searching a Product from the Catalog

The Catalog page enables you to select and configure products. This page allows multiple ways to search and choose the product you are looking for.

You can select products by using the **Browse Catalog list**, **Browse**, or the **Search bar**. When using the search bar, you can search for a product across all categories, or for an individual category by:

- Product Code
- Product Family
- Product Description
- Product Configuration Type
- Category Names
- Location

The search works for all the products, even if the product is not associated with the category. However, the products must have their respective Price List Items associated with a Quote.

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If Smart Search is enabled in your org, there will be typeahead results available while searching. Note that the typeahead is case sensitive.

Note: If your smart search is using Azure, ensure that you search term does not contain hyphen (-).

The sorting is done alphabetically. In the search bar, enter the desired product and click **Search**. For a description of the product, click the icon.

As per the Salesforce limitation, the Text Search in the **Search bar** does not support wildcards at the beginning of the search term. For example, there are 3 products in your Catalog, namely Cat1_Product1, Cat1_Product2 and Cat2_Product4. If your Search Term is **Product1*, the search returns 0 result and if your search term is *Cat1**, the search returns 2 results (Cat1_Product1 and Cat1_Product2).

Based on your selection from any of the above-mentioned sections, the products are displayed in the Product Catalog section in the center. You can use the refine your search feature to narrow the list of products**.**

To search for a product from the catalog

1. You can search for a product by doing any of the following:
    - From the **Browse Catalog** list, select a category hierarchy you want to view.
    - From the Browse section, navigate to the category hierarchy for the desired product.
    - In the Search bar, type a category or product name and click Search.

    Based on your selection, the products are displayed in the Product Catalog section. If you have Refine Your Search configured, all the filter fields related to the selected category and Search bar are displayed dynamically in the Refine Your Search section. The system displays the products you search using the Search box, Refine Your Search, and Browse Catalog feature collectively.

    Proposal Locations are defined to distinguish differentiate the products as per your customer locations. Depending on the Account and Proposal Locations defined for your Quote /Proposal, the system displays products on the catalog page:
    • If no account is selected on Quote/Proposal, the system does not filter any product.
    • If an account is associated with your Quote/Proposal, the system return displays account locations (in the drop-down list) which are associated to the Account.
    • If no proposal locations are defined, the system filters the products based on the account

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(previous 2 points).

• If you have defined proposal locations on your Quote/Proposal, the system displays only proposal locations in the drop-down list.

2. You can further filter the product list by selecting the filter values from the **Refine Your Search** section. These filter fields change dynamically based on your Category and Search to further filter the products.

   If you perform another search from Step 1, all your previous search selections are reset.

3. You can also edit the quantity of your product if the quantity field is enabled. To view the quantity field on the catalog page, the administrator must make appropriate settings.
4. From the Product Catalog section, to select a product and add it to the cart, click **Add to Cart** next to it. The selected product is displayed in the Selected Products section on the right.

The product is added to the Selected Products panel on the right. If a product is configurable, you can configure a product with multiple options or attributes.

Configuring a Product from the Catalog

If you have attributes and/or options associated to your products, you can configure them from the Catalog page.

Configure Product Attributes - You can select and configure attributes for your products from the Attributes page.

Configure Options for bundle product - You can select and configure options for your products from the Options page.

If the system is configured such that you have to include one or more products along with your regular product selection, you may view the following possibilities on the Catalog page and Options page:

- If there is only one product, it is auto-included automatically and you will see only the **Add to Cart** button.
- If there is an option to select only one product from a product group, you will see a radio button next to each product and the **Add to Cart** button.

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- If there is an option to select multiple products, depending on the minimum/maximum number of products set for your organization, you will see a checkbox next to each product and the **Add to Cart** button. This enables you to select multiple products at once.

- If no option products are visible due to Visibility rules configuration or different price lists, and your administrator have set the minimum options as zero, the system considers this configuration as invalid. Ensure that your administrator has set the right configuration for the Min/Max option for an option group.
- Apttus CPQ does not display a message when you hover over an option product which is disabled on the configuration page. As a part of notification and error handling, Apttus CPQ provides a defined Rule Messaging for exclusion rules. If you run the exclusion rules successfully, no hover over message is displayed, unlike in the case of inclusion rules where such messages are helpful for you to make a decision about adding products to the cart.

To configure product attributes

1. You can select a product by doing any of the following:
    - From the Browse Catalog list, select a category hierarchy you want to view.
    - From the Browse section, navigate to the category hierarchy for the desired product.
    - In the Search bar, type a category or product name and click **Search.**
2. From the Product Catalog section, to configure attributes for a product, click **Configure** next to it.
3. Configure the requisite attributes and do any of the following:
    - Click **Next**. This button appears in case of bundled products where you may need to configure or add additional products.
    - Click **Add More Products**, to add additional products.
    - Click **Remove Item**, to remove a product.
    - Click **Go to Pricing** to price the product.
    - Click **Validate** to verify your configuration.

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The values for an attribute can be driven by the numeric expression builder configured for the selected product. While the constraint and pricing rules are processing in the system, the **Go to Pricing** button is disabled on the Configuration page.

Based on your selected attributes, the system saves the product in your shopping cart.

- On the Product Attribute Group Detail page, you can set the Two or Three Column Display for the product attributes in order to view the configured attribute groups in two or three column format.
- Apttus CPQ displays a red border on the left when attributes are set required in the UI.

Attribute Enhancements: Hidden Attributes

The CPQ Attributes feature is enhanced further to derive the price for a product from an attribute without additional configurations to the Attribute Group for that attribute.

Consider a product Internet Plan, with three attributes - Internet Speed, Data Limit, and Package Price. On configuring the product from the cart page, the user enters the value for Internet Speed and Data Limit. Create an attribute Package Price, for which the value is calculated using the formula Internet Speed * Data Limit using field expression builder. The Package Price attribute value will not be shown to the user on the ProductAttributeDetail, ConfigureBundle, and ConfigureOptions pages. The user can choose to derive the Base Price of the product Internet Plan from the Package Price Attribute Value using the Default Price From field from the Default tab of the Price List Item.

The attributes calculated using formula fields are hidden from the following pages:

- Apttus_Config2__ProductAttributeDetail3- Attributes for Bundle or Standalone products
- ProductAttributeDetail
- PageConfigureBundle page - Attributes for Options
- SelectConfigOptionsDetailView- Attributes for Options shown in line with the option
- ConfigureOption page.

To configure bundle products

1. You can select a product by doing any of the following:

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- From the Browse Catalog list, select a category hierarchy you want to view.
- From the Browse section, navigate to the category hierarchy for the desired product.
- In the Search bar, type a category or product name and click **Search.**

2. From the Product Catalog section, to configure options for a product, click **Configure** next to it. The selected product is displayed in the Selected Products section on the right and the options page is displayed.
3. Select the options for your bundle, and do any of the following:
   - Click **Add More Products**, to add additional products.
   - Click **Remove Item**, to remove a product.
   - Click **Go to Pricing** to price the product.
   - Click **Save** to save your selected product for that quote.
   - Select **Optional** to consider a particular line item as an optional one.

   The values in the **Quantity** field for options can be driven by the numeric expression builder configured for the selected option.
   The **Save** button is used in case you want to save your configuration before proceeding to the attributes and cart page. For example, if you change the **Quantity** of the options associated with your bundle product, you might want to save the configuration before moving to the cart page.

Configuring Optional Line Items

You can give a choice to the customers via the proposal if they want to mark the line item as not required, but recommend these as part of the configuration. You can present these line items separately in a proposal document or keep them as a part of the configuration. An important aspect is that you can choose to price these line items separately or as part of the bundle (applicable for option line items).
Marking a bundle as *Optional* enforces the sub-bundle and the option products below them as optional line items by disabling the **Is Optional** check box. For such bundle products which are marked as *Optional*, it is recommended to keep the option products as optional. Otherwise, the system considers this as an incorrect configuration.

Note that the price of the “optional” options under bundle does not get added to the bundle price. However, if the bundle itself is marked as “optional”, all the selected options under the bundle are forced to be “optional” and the bundle does include the price of all the options. The bundle then is not added to the totals to ensure that the quote total is not including the “optional” products.

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Additionally, the required options cannot be made “optional” unless the whole bundle is marked optional. You cannot mark an option as "optional" in the following two conditions:
If the option product is configured as *Required.*
If the option product belongs to an Option Group that has **Min Options** and **Max Options** set as 1.
The **Validate** button ensures that the constraint and pricing rules are processed for your products. While the configurations are validated, the **Go to Pricing** button is disabled on the Configuration page. Once validated, the **Go to Pricing** button is enabled .

After you click **Go to Pricing**, the Cart page is displayed.

You can clone a bundle within the same quote, make modifications, and use it as another bundle.

This feature enables you to clone a bundle with attributes, options, and pricing, make desired changes and save it as another bundle.

Min-Max Messaging: On the product configuration page, when you make a selection of options in the desired Option Group, Apttus CPQ displays the min-max messages guiding you about how many options can be selected. For example, If you want to select X number of options where options can be X to X+n (n=1,2,3...). Then you will see an appropriate message for selecting those options from the desired Option Group.

Horizontal Scroll for Option Groups Tab : The Product Configuration page provides a horizontal scroll bar when you have many option groups. You can see a single line of tabs for option groups and for menus with many option groups, you can also see the sub menus with option groups being available for selection.

Increased Threshold for Bundle Maintenance Job: You can run Bundle Maintenance Job without failure when Apttus CPQ has large number of options validated with the following scenarios.

- 10,000 options groups for the entire system
- 10,000 options in a given option group
- 2,000 option groups for a given bundle with an average of 3 to 5 options each group

To clone a bundle within the same quote

You must have an existing bundle.

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1. Select a bundle and click **Validate**. You can only clone a bundle.
2. Click (Copy icon).
3. You can configure the bundle or make the desired changes and click **Validate**.

You have created another bundle from an existing bundle. You can proceed topricing.

To lock an option value

Ensure that field derives its quantity from an expression built using the field expression builder.

1. To lock an option quantity, navigate to the **Option group**, choose your option and select **Auto-Update Quantity**.
2. On selecting the checkbox, a lock icon appears next to Quantity, when you configure your Bundle from the Catalog Page. The user can click the lock icon next to an option, to ensure that any updates to the field from which its value is derived does not affect the value set the first time. For example, you can lock the quantity field for an option is populated based on multiple attribute values using the field expression builder, once the user enters the attribute value on the AttributeDetail3 page and clicks Next, the value for quantity is auto-populated.
3. Select the option and click the Lock icon.
4. Navigate back to the Attribute detail page and edit the attribute value and click **Next**. Notice that the value of the Option does not change even though the attribute value has changed.

- If you skip any mandatory configurations, the status of your configuration is shown as pending with a red exclamation mark on the Cart page. You must complete the pending configurations in order to finalize the Cart.
- If you have added any items by auto-inclusion rules, you cannot make them optional.

When a product is added by rule that means AddedByRuleInfo__c field on the line item has a value populated, Apttus CPQ does the following:

- Clears "Is Optional" flag" if previously checked
- Hides "Is Optional" field
- Unchecks or disables "Is Optional" if line item "Is Required" flag is checked at the Option Group level.

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Pricing Products on the Shopping Cart

In the Pricing stage, you can price the selected products and apply adjustments such as markup value, discounts, and more from the Cart page.

You can choose to view the cart in the normal UI or grid UI. The functionality and buttons remain the same, only the orientation and spacing of columns and buttons are different in both the UI.

You can perform the following actions:

- **Add More Products**: Return to the Catalog page to add more products.
- **Installed Products**: Select products from a list of products that have been purchased and associated with the account associated with the proposal. This enables you to select products directly that are previously purchased by the account.
- **Add Miscellaneous Item**: Add any miscellaneous charges that are not SKU related such as shipping charges or sales tax to the quote.
- **Reprice**: To recalculate the manual pricing adjustments.
- **Review & Finalize**: Proceed to the final stage of configuration.
- **Save**: Saves and changes the status to Saved, if status did not equal to Saved, Pending Approval or Ready for Finalization. You may return to the specified return URL or proposal object. For example, if you came to arrived on the cart from the Opportunity, the system will return to the Opportunities page.
- **Quick Save**: Saves and changes status to Saved if status did not equal to Saved, Pending Approval or Ready for Finalization. You stay on the same page
- **Save & Reload**: Saves and changes status to Saved if status did not equal to Saved, Pending Approval or Ready for Finalization. Reloads the Cart by re-querying the Product Configuration and setting the cart to show the first page, by doing this it runs Pricing.
- **Edit Price Agreement**: Enables you to add and set prices for a product that are associated with your contract. When you renew or regenerate a catalog from your contract the defined price agreement prices are applicable.

Key fields in the **Summary** tab and their description:

Fields	Description
Actions	You can see the one or more of the following icons:

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Fields	Description
	• Click **Configure** to configure a bundle option within a bundle. This offers increased control over product selection, as well as making it easier to select products as selecting one bundle full of products can replace having to select those products separately. • Click **Copy** to clone a bundle with attributes, options, and pricing and make modifications as needed and save it as another bundle. • Click **Remove** to remove a product from your current selection.
Totaling Group	The group used for a line item in the Totals view.
Product	The selected product.
Charge Type	The relevant charge type for a product. A product can have multiple charge types such as License Fees, Implementation Fees, and more.
Base Price	The base, or starting price of a product. This is the List Price with any line item automatic adjustments applied.
Option Price	The sum of all option prices chosen if this is a bundle product.
Quantity	The quantity of product being quoted.
UOM	Unit of measure for the quantity field. Set up by the System Administrator per product/charge type.
Term	The selling term of the product, measured in Months, Days, Years etc.
Frequency	Whether the charge is One Time, Recurring, or Usage.
Extended Price	Base plus Option Price multiplied by Quantity and Term. (Base Price * Quantity * Term)

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Fields	Description
Adjustment Type	Values for manual adjustments whether you want to apply discount or markup on the price.
Location	The location in which the said product will be available and delivered.
Adjustment Amount	Field to enter the amount or percentage of manual adjustment.
Adjusted Price	Extended Price with any manual adjustments applied.
Renewal Adjustment Type	Specifies the type of renewal you want to apply for an asset during renewal. Values are: *%Uplift* and *Uplift Amount*. Applying any value here shows the effect on asset renewal only. Ensure that you have an active Workflow executing asset pricing, else the price change will not appear in the Cart.
Renewal Adjustment Amount	Specifies the actual amount of the value you have chosen in **Renewal Adjustment Type**. This amount is applicable when you renew an asset. Ensure that you have an active Workflow executing asset pricing, else the price change will not appear in the Cart.
Guidance	Specifies the percentage range within which you can adjust the amount. This amount can be the amount range by which a product can be marked up or discounted.
Net Price	Adjusted price with any category level adjustments applied.
Is Optional	Indicates if your line item is an optional one. This column works only when you have set **Enable Optional Items** to true in System Properties. Refer to System Properties topic for details.
Is Optional Rollup Line	

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Fields	Description
	Indicates if the price of the optional line item should roll up at the bundle level. This column works only when you have set **Enable Optional Items** to true in System Properties. Refer to System Properties topic for details.
Allocate Group Adjustment	Indicates if the line item is eligible for group adjustments. Set this to *true* when you want to allow group adjustments to be applied at the line item level also. Set this to *false* to lock a line item record and prevent manual and group adjustments. This functionality is helpful when your cart has many products and you want to prevent the sales representative from applying mass adjustments to certain products that are approved by your Sales Head. For such scenarios, you can lock these products on the cart.

The Show Duration link is for advanced functionality related to Pro-ration and co-termination of recurring charges. If this is setup for a price list item, then you can charge in a different frequency from what the price list item is defined in and set Start and End Dates and a Term. For example, a price list item may be a recurring yearly charge but on this quote, you may wish to charge only for 6 months.

In the **Shopping Cart** section, the price line items are further broken out to reflect pricing for any options associated with the bundle product.

The **Totals** section shows all Totals by product category and a Grand Total sum of one time plus recurring charges. The Totals tab also allows for a discount or markup to applied to a category as a whole and rolled down to the individual line items in that category. The system distributes the adjustments uniformly across each line item. If any automatic summary adjustments have been configured, they will also appear in this view.

Proposal Locations are defined to distinguish differentiate the products as per your customer locations.

On the cart page,
• The location drop-down list displays all the account and proposal locations.
• If your system admin has created any lookup filter criteria, the system follows the criteria and filters the locations accordingly.

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To price a product on the shopping cart

You can edit any field for an added product on the cart only if the administrator has set requisite permissions for the *CartDetailView* page.

1. In the **Quantity** column, you can change the quantity for a product. The values in the Quantity column for a product can be driven by the numeric expression builder configured for the selected product. You can click **Reprice** link individually to enable the system to recalculate the price considering the new quantity.
2. In the **Selling Term** column, you can enter a number to specify the term duration during which the product is sold.
3. In the **Frequency** column, you can select a frequency type. The frequency type is displayed for recurring charges.
4. From the **Adjustment Type**, you can select one of the following and enter a numeric value in the **Adjustment Amount** column:

Option	Description
% Discount	Select this and in the **Adjustment Amount** column, enter a number. For example: If you enter 10 in the Adjustment Amount column, this implies that you want to give a discount of 10%.
Discount Amount	Select this and enter a flat discount amount in the **Adjustment Amount** column.
% Markup	Select this and in the **Adjustment Amount** column, enter a number. For example: If you enter 10 in the Adjustment Amount column, this implies that you want to markup the price by 10%.
Markup Amount	Select this and enter a flat markup amount in the **Adjustment Amount** column.
Price Override	Select this and enter an amount in the **Adjustment Amount** column. The amount you enter overrides the net price of the product.

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Option	Description
Base Price Override	Select this and enter an amount in the **Adjustment Amount** column. The amount you enter overrides the base price of the product and all the other calculations on the product would happen based on the new base price. **Allow Manual Adjustment** must be selected on the product line item, in order to make **Base Price Override** editable.
% Discount off List	This is similar to % Discount; except it calculates the discount amount always on List Price of a Bundle and applies to Extended Price.
% Uplift	This gets applied every time to products that are added from the Asset.
Price Factor	Select this and enter an amount in the **Adjustment Amount** column. The amount you enter gets multiplied by the **Extended Price** to calculate the new **Net Price**.

5. Click the **Details** tab. In this view, the price line items are further expanded to reflect pricing for any options associated to bundle products. You can make changes as per your requirement.
6. Click the **Totals** tab. This view shows all Totals by product category and a Grand Total sum of one time plus recurring charges. The Totals tab also allows for a discount or markup to applied to a category as a whole and rolled down to the individual line items in that category. The system distributes the adjustments uniformly across each line item. If any automatic summary adjustments have been configured, they will also appear in this view.
7. Do one of the following:.
    - To reprice all the parameters such as a change in the quantity, term, frequency, and any other custom field, click **Reprice All**.
    - To apply all the adjustments you made on the shopping cart, click **Apply All Adjustments**.

All your selected products are priced with the desired parameters.

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- On the configuration page, you can observe the **See Price in Cart** link for the option product. When you click on that link, you notice that for the free item, Included with bundle text is displayed as a price value.
- For single or multiple price list items of the option products, the **See Price in Cart** link pops out well-aligned table for the prices of the corresponding products.
- You can see the carrot icon when the option has multiple charges of multiple charge types.
- You can see "Included in Price" when the option has a single charge, and it is included in the price of the bundle.
- You can see the pop-up for the charge types when you click **See Price in Cart**.
- On the product options screen during product configuration, you can see prices against the options and when you expand the arrow against the options a list of prices displays.
- In the multi-adjustment pop-up, when you apply **% Discount**, Apttus CPQ applies the **Discount Amount** to the **Base Price** after multiplying it with **Quantity** and **Selling Term** of the bundle product.

You can review the products and prices configured for your quote one last time before returning to the Quote/Proposal page.

- Creating a Price Ramp for a Product
  You can create a price ramp for a bundle product or for an option inside the bundle. You can create ramp lines to spread across time periods and add new ramp lines, create user ramps where from one period to the next the quantity (number of users) increases (user count/quantity ramp), and also create revenue ramps where from one period to the next the level of revenue commitment increases (total price/override ramp).
- Defining Tiered Pricing
  Tiered pricing is used to establish rates for a future usage. There is no pricing until you know the future usage.
- Editing a Price Agreement
  After product selection and configuration, you are redirected to the Shopping Cart page. The **Edit Price Agreement** button enables you to add and set prices for a product that is to be associated with your contract. When you renew your contract or regenerate a contract, the defined price agreement prices are applicable.

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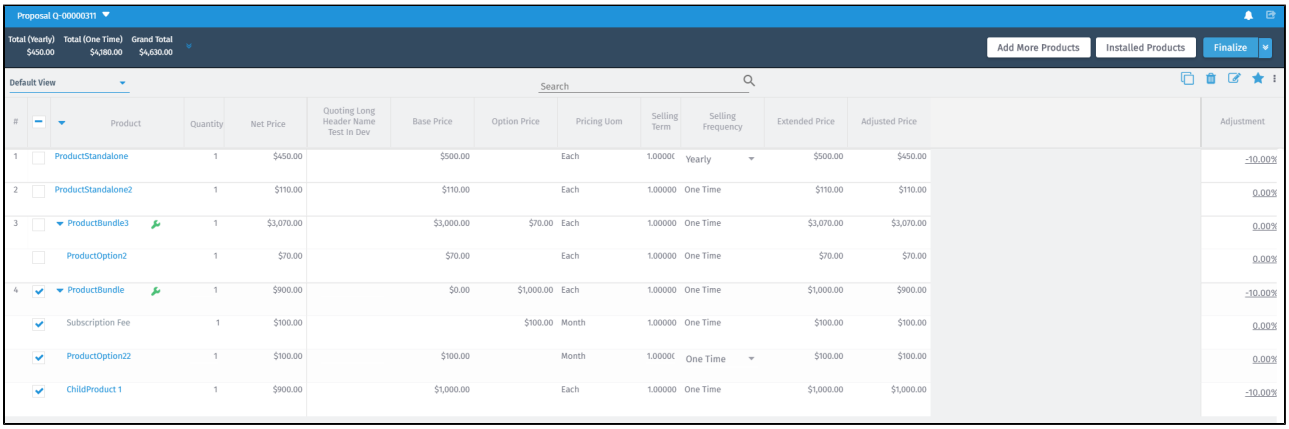
- Contract Pricing
  Contract Pricing in CPQ enables you to store contracted prices in the system. When a quote is created in CPQ, the quote price is determined by looking up the price defined in the Contract.

Viewing the Cart in Grid View

The shopping cart has been redesigned to provide better usability and accessibility to the sales representative.



Following are the key changes that you can see in the shopping cart:

- **Displaying cart level actions on top-right corner:** A system displays the primary cart level actions on the top right corner of the page with **Finalize** action as a default. The other user actions such as **Reprice**, **Apply Promotion**, **Analyze Quote**, **Submit for Approvals** and so on are made available based on the user scenarios. The user actions that are grayed out show an info icon next to them, providing a reason for non-availability for selection. You can customize the primary and secondary buttons using the Display Action Settings in the admin guide.
- Action buttons, such as **Add More Products**, **Installed Products, Reprice**, **Finalize**, **Submit for Approval,** and more are available as picklist values.
- Mass actions, such as **Delete Product**, **Copy Product**, **Save as Favorite**, **Mass Update**, **Product Collaboration**, at the line item level are available as picklist values. Any change using Mass Update performs the calculation on the client side for faster execution.
- Easy and type-ahead search functionality on the top of line item table.

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- A Quick view of the **Grand Total** amount on the top-right corner. Also, **Show Totals**, **Total Adjustments** are displayed on the page header. The right arrow next to Grand Total shows you the detailed calculations at the line item level.
- Bundle cart line items with expand/collapse functionality.
- A spinner on the cart header to indicate the progress of any rules/adjustments that are being executed in the background.
- Infinite scrolling for line items avoiding the need for pagination.
- Column headers: Always available on the top while scrolling. Non-numeric fields are center aligned and numeric fields are right aligned.
- Editable fields and actions on hover.
- Support for different data types for columns, such as Text, Picklist, Lookup, Date, Hyperlink Formula, Hyperlink Image Formula, Image, Formula, and more.
- **Support for Deal Guidance:** On the Angular UI, for a product that you configured on the cart page, the system displays a Pricing Guidance pop-up for a customer deal. On the Guidance column when you hover your mouse on a green circle, it pops up a screen with some guidance parameters.
- **Ability to apply mass adjustments for options without applying adjustments on bundle:** You can apply the mass update on the option and bundle products separately. A new check box design has been implemented that depicts how you can choose to apply the mass adjustments on bundle, option or both.
  On the bundle level, when you click for the consequent times and click **Mass Update**, you see the following behavior:

Click number	Check box design	Behavior
First	Solid square box	The mass updates are applied only to the bundle product. Sub-bundle products also behave as bundle products.
Second	Minus sign	The mass updates are applied only to the option products.

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Click number	Check box design	Behavior
Third	Checked sign	The mass updates are applied to both, the bundle and option products.
Fourth	Empty check boxes	The mass updates are not applied.

- Support for long Product Name, Column text, and charge names
- **Providing client-side computation facility**:
  - On Cart Grid with custom setting **Enable Auto Reprice** set to ON, when you change any Quantity on cart line item, system updates the pricing fields such as Extended Price, Net Price for the specific row.
  - Calculate totals (by charges and frequency) and grand totals
  - Calculate subtotals for category
- **Providing bundle roll-up for cost and price**: Roll up line gets updated when individual line's price gets changed and any discount is applied on the summary line when any individual lines get updated.
- **Support for removal of price list items for the existing quotes:** Whenever you have a PLI removed from an active quote, the system notifies you and removes the item automatically.
- **Eliminating the additional pricing spinner:** When the pricing has been completed on the catalog or config page, the system does not show spinner on angular UI or the cart grid page.
- **Recalculating the end date of one-time fee:** Based on the start date and the selling term, the end date for one-time price type is re-computed when you delete it in the cart.
- **Showing sub totals and totals sections:** The Cart Grid UI shows sub totals and totals section at the bottom of the cart page based on a new setting called `EnableContextualTotals`. For more information, see Config System Properties in the Admin Guide.

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- **Providing an indicator for line item approval:** If you make updates to a quote/proposal, the system displays an indicator "Approval Required" for the line item on the cart page.
- **Reordering of primary lines on the cart:** You can drag and drop the primary line items on the cart using the hand icon that helps you sort the products.
- **Cancelling the order line items**: While amending an in-flight order, you can cancel one or more order line items from the cart that are not yet fulfilled (orders with pending and in-fulfillment status).
- **Improved User Experience for Adjustment Amount field**:
  Apttus CPQ displays a blue bar when you click or hover over the **Adjustment Amount** field on the line item or **Totals** section in the cart page. This feature improves the user experience by highlighting the **Adjustment Amount** field in order to make it noticable during an edit mode.
- **Three Columns in the left section of the Cart Grid**
  - The left side of cart grid is limited to three line items fields.
  - When you create a new cart view and try to drag a fourth field into the third section, it moves that field to the middle section.
  - When you create a new cart view as an admin, you can see the same behavior as a general user creating a cart view.

- On the configuration page at the **Summary** section, the **Hide Option Groups** link is disabled when no product option is selected.

  For example, while you are configuring a quote, you do not want to include option groups that are associated with the product. In that case you want to finalize the quote and add the product on the cart without any options. Hence, the Product Summary section need to hide or disable the Hide Option Groups link, which is irrelevant in this scenario.

  Suppose you are providing a quote of an internet plan to a customer which has no installation fee and router charges for the festival season. In that case, you can configure this product without the options, namely Installation Fee and Router Charges.

You can resize the first column and change the sequence of the columns (by dragging the line items vertically). This is controlled through Display Column Settings in the admin guide .

Please keep in mind the following pointers for icons/action buttons when using the new grid view:

- Copy, Remove and Product Collaboration – these icons/action buttons are available when all the selected line items are primary line items. Else the icons are grayed out.

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- Mass Update – this is available for both, primary and secondary line items, except you have separate configurations such as **Quantity** = *Read Only*.

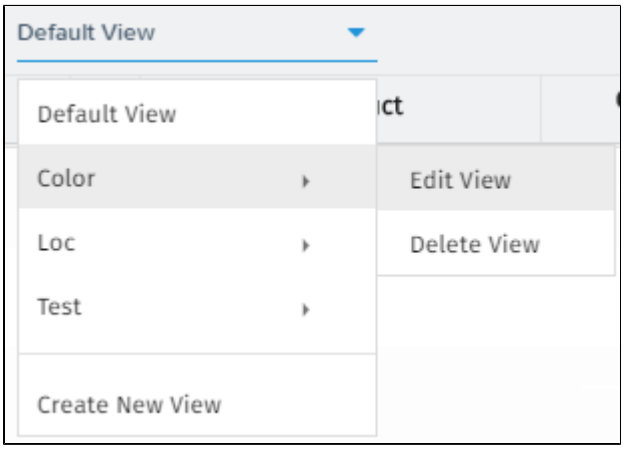
Required Configuration

This functionality can be achieved by a simple configuration of creating a new flow with the Cart page name as *Apttus_Config2__Cart#cartgrid*. You must then specify the flow name in your **Configure Products** button to view the new UI for the shopping cart. See Configuring Flow Settings and Creating Custom button pages for details in the admin guide .

> For details about service cart, see Viewing the Service Cart.
>
> For details about cart views, see Managing Cart Views.

Managing Cart Views

Similar to Salesforce views, the new cart grid supports Cart Views containing predefined filter values on the cart. These views help you filter and display cart line items as per your configurations. You can create new views, edit the **Group By** field and the list of columns to be displayed for a particular view of the cart.



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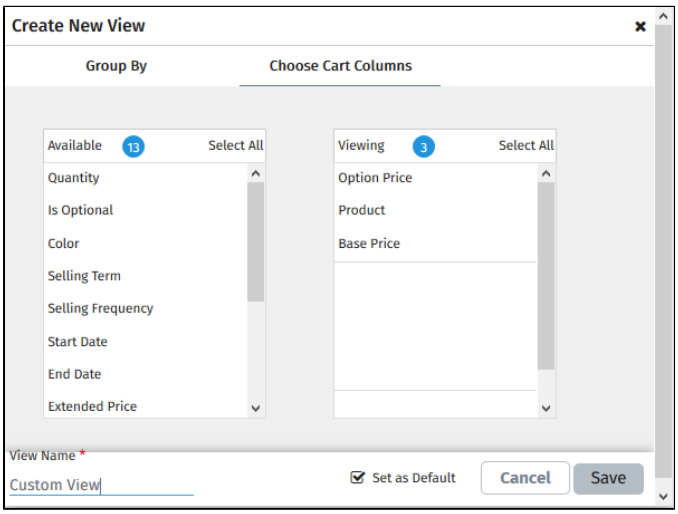

By default, you can create a new view, edit and delete views. When you delete a view, the record is deleted from your flow but does not get removed from the list of views. This means that your view is still visible to other flows.

Setting Custom View as Default

You can choose one of your custom views to set as default, which then overrides the administrator view. If you do not set the custom view as "Default", then the administrator view becomes the default. The system retains and displays the custom view next time you login. You can set the custom views based on many parameters such as product, color, and location, using the **Create New View** pop up. After you save the created or updated custom cart view, the system loads it instantaneously. Under Choose Cart Columns section, you can select and move the field values to be displayed or removed using the hand icon.

Note that Search function does not work on Cart Grid UI while using custom views.

Required Configuration

For each view that you create, you must ensure that your administrator has listed your flow name as a picklist value in **Config Settings object > Flow picklist field**. If your administrator has not listed the flow name in this picklist field, you would be allowed to create a new view but would not be able to save the view. Also, after your administrator has listed the flow name in this picklist field, you can view and use all the views created by different users, provided the flow names are listed in the Flow picklist.

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The columns displayed in your view are mapped with your flow. You can edit the columns using Display Column Settings in the admin guide . You can modify the group-by fields by listing the API names of the desired fields in the **Group field** available at **Setup > App Setup > Develop > Custom Settings > Config System Properties > Manage > System Properties**.

Bucket Adjustments

You can group the adjustments in buckets. Adjustments in the same buckets are applied to the same starting price and the results form the running total price points. With bucket adjustments, you support cascading pricing discounts by controlling if you want to apply the discounts on the previous or starting price of the Line Item. The adjustments that fall under the first bucket are applied to the starting price. Subsequent bucket adjustments are applied on the previous bucket running total price.

A **bucket** (field on **Adjustment Line Item** object) serves as a container for the adjustments that a sales representative applies on a line item in the cart. The final value after applying the adjustments within the same bucket is stored in a field called **Running Total**.

If Bucket field value is null, a sales representative must choose between the starting price, from bucket 2 to the running total and the previous price. The pricing engine performs the following sequential tasks:

1. Applies the manual adjustments from bucket 1 to the starting price.
2. Applies the price from bucket 2 to the running total that is the result of calculating bucket 1 adjustments.
3. Applies bucket 3 to the running total of bucket 2 adjustments.

The same calculation logic applies to subsequent buckets. Numbered buckets are processed before null buckets.

Use Case 1: Creating Bucket Adjustments

Description: This use case describes how you can create adjustment buckets on the cart page. You might use this functionality differently, depending on your business case.

Bucket adjustments help you control at which point you want to apply the adjustments in a cascaded adjustment cycle.

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Suppose you are a sales representative and you want to provide cascading price discounts to a product. You have three categories of discounts you can provide. The first category is called “Valued Customer Discounts”, the second category is called “Marketing Incentives”, and the third category is called “Seasonal Promotions”. For each of the category, you want to provide multiple discounts, being either % based or an amount based. This is also to incentivize the user to make an immediate purchase.

In this case, you can create three buckets, each representing a category. In each bucket, you can define one or multiple % based discounts, one or multiple amount based discounts.

Bucket 1: Valued Customer Discounts (VCD)

1. 5% off

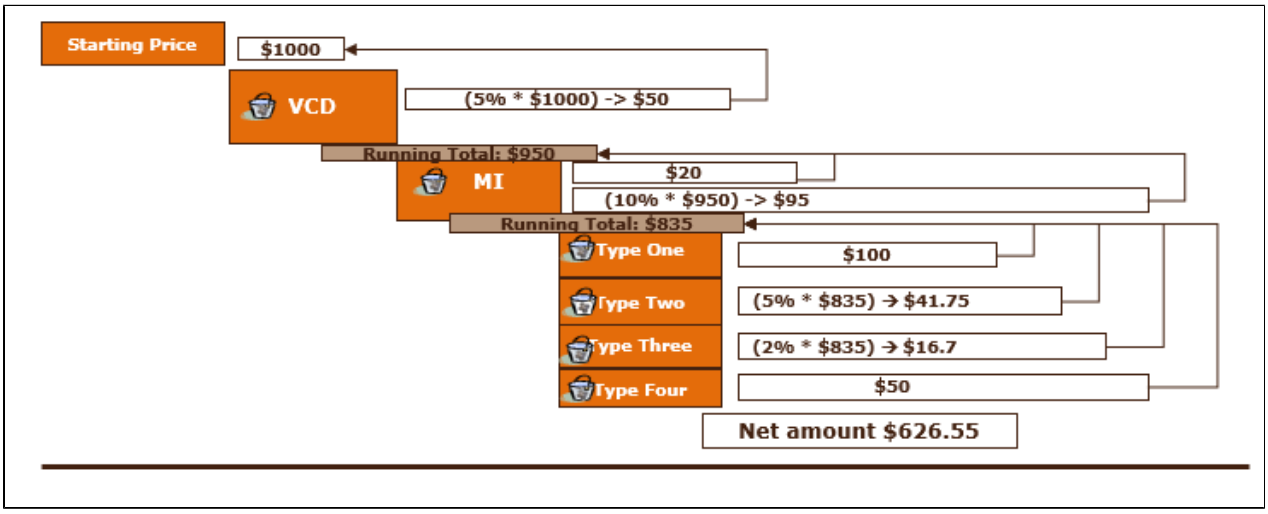
Bucket 2: Marketing Incentives (MI)

1. $20 off
2. 10% off

Bucket 3: Seasonal Promotions (SP)

1. Type One: $100 off
2. Type Two: 5% off
3. Type Three: 2% off
4. Type Four: $50 off

If the starting pricing is $1000, the calculation works as depicted in the graph below:



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To enable Bucket Adjustments

1. Go to **Setup > App Setup > Develop > Custom Settings > Config System Properties > Manage**.
2. Click **Edit** next to *System Properties* and select **Enable Adjustment Buckets**.
3. Click **Save**.

Result: Bucket Adjustments are enabled in your org.

Next Step: You can use the bucket adjustment functionality on the cart.

To apply Bucket Adjustments on the Cart

Prerequisite: You must have selected **Enable Adjustment Buckets** custom setting and defined a numeric value in **Max Adjustment Lines** custom setting.

1. For any line item in the cart, click $ icon to open the Mass Adjustments dialog box.
2. In the **Applies To** column, you will see the number of buckets configured by your administrator.
   By default, you are allowed to create 10 buckets.
3. Depending on your requirement, select the bucket for multiple adjustments and click **Save**.

Result: Bucket Adjustments are applied for line items in your cart.

Use Case 2: Applying Unit Level Discounts

You can apply the unit level discount on the line item level, adjustment line item level, or adjustment line items with different UoM (Unit of Measure) level. For instance, case: 10 Each (Frequency/UoM) For details, refer to Unit of Measure (UoM) Setup and Conversion in the admin guide.

On the cart in the multi-adjustment pop-up, when you apply **% Discount**, Apttus CPQ applies the **Discount Amount** to the **Base Price** after multiplying it with **Quantity** and **Selling Term** of the bundle product.

> You must select the custom setting `Enable Base Price Adjustment` in the System Properties > Price Settings in order to reprice the line item.

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Scenario 1: On Line Item	List Price	Base Price	Quantity	UoM	Extended Price	Adjustment Type	Discount Amount (%)	Adjusted Price
	$100	$100	5	Each	$500	Base Price Discount	10	$450

Scenario 2: On Adjustment Line Item	List Price	Base Price	Quantity	UoM	Extended Price	Adjusted Price	Bucket	Adjustment Applies To	Adjustment Type	Amount	UoM	Net Price of Bundle	Unit Level Price
	$100	$100	5	Each	$500	$350	Bucket 1	Starting Price	Discount %	10%	Each		$50
							Bucket 1	Starting Price	Discount	$50	Each	$400	$50
							Bucket 2	Bucket 1	Base Price Discount	$10	Each	$350	$80

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Scenario 3: On Adjustment Line Item with different UOM	List Price	Base Price	Quantity	UoM	Extended Price	Adjusted Price	Bucket	Adjustment Applies To	Adjustment Type	Amount	UoM	Net Price of Bundle	Unit Level Price
	$100	$100	5	Each	$500	$395	Bucket 1	Starting Price	Discount %	10%	Each		$50
							Bucket 1	Starting Price	Discount	$50	Each	$400	$50
							Bucket 2	Bucket 1	Base Price Discount	$10	Case	$350	$80
										$1	Each	$395	$79

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On the Bucket 2, Apttus CPQ calculates the price after discount based on the UoM for each unit . For instance, $1 discount is applied for 5 option products, which in turn adjusted the net price of bundle to $395 and unit level price $79.

Creating a Price Ramp for a Product

You can create a price ramp for a bundle product or for an option inside the bundle. You can create ramp lines to spread across time periods and add new ramp lines, create user ramps where from one period to the next the quantity (the number of users) increases (user count/quantity ramp), and also create revenue ramps where from one period to the next the level of revenue commitment increases (total price/override ramp).

While creating ramps the start date, end date and quantity are required fields. Ensure that the dates must not overlap between ramps.

⚠ You cannot create ramps and tiers both for an option.

- Creating the Price Ramp on the Configuration Page

  On the Configuration page, the price ramps functionality comprises part of the configuration group for a product or option whose pricing is rampable. If a product's or option's pricing is rampable, a Show Ramp button appears next to each rampable option.

- Creating the Price Ramp on the Pricing Cart Page

  For a product on the Pricing Cart page whose pricing is rampable, the price ramps functionality is embedded in the pricing cart. An Actions icon appears at the right side of the selected row for a product.

Creating the Price Ramp on the Configuration Page

On the Configuration page, the price ramps functionality comprises part of the configuration group for a product or option whose pricing is rampable. If a product's or option's pricing is rampable, a Show Ramp button appears next to each rampable option. By clicking the Show Ramp button, you can autoselect the option and ramp it, displaying the ramps table. You can also click Show Ramp on a selected option and it will show the ramps table. The Show Ramp button enables you to create a price ramp for the selected product or option, then toggles to a Remove Price Ramp button, which allows you to remove the price ramp from that product or option.

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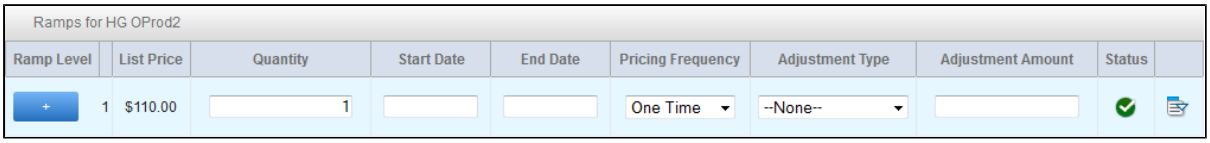
To create the price ramp on the options/configuration page

Enable Price Ramp, must be selected for the product items in the pricelist.

1. From the Product Catalog click Configure for a product, to display the options/configuration page.
2. Click next to a rampable option. The ramps table is displayed.



> If your admin has checked **Enable Auto Ramp Creation** while configuring the price list item for this product, the system automatically enables price ramp on the second charge type, when price ramp is enabled for the first charge type on the cart page.

3. Specify the price ramps for a product as described below:

Option	Description
Ramp Level	Displays the number of the levels in the price ramp for the selected product, which are generated automatically.
List Price	Displays the selected products list price.
Start Date	Displays and allows you to specify the starting date of the usage period for a level in the price ramp for the selected product.Note: Start Date must be before Ending Date.
End Date	Displays and allows you to specify the ending date of the usage period for a level in the price ramp for the selected product.
Quantity	Displays and allows you to specify the quantity of the selected product for a level in the price ramp.

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Option	Description
Selling Term	Displays and allows you to specify the selling term. If you are using default selling term, then the proposal end date must be blank.
Selling Frequency	Displays or allows you to define the usage period for a level in the price ramp for the selected product by specifying its term and the type of period.
Adjustment Type	Displays or allows you to specify the adjustment type for a level in the price ramp for the selected product.
Adjustment Amount	Displays or allows you to specify the adjustment amount for a level in the price ramp for the selected product.
Status	Displays the status. A **X** red icon is displayed to indicate an issue.

4. Click and click select Save Ramps.

The ramp for an option is created and added. You can add multiple ramp levels to an option by selecting Add Row or remove by selecting Remove Row.

Creating the Price Ramp on the Pricing Cart Page

For a product on the Pricing Cart page whose pricing is rampable, the price ramps functionality is embedded in the pricing cart. An Actions icon appears at the right side of the selected row for a product.

On the Pricing Cart page, you can click the Ramp icon on a line item to create ramps. The ramp overlay is displayed enabling you to edit ramps lines.

Note

The Ramp icon is displayed only on a primary line item that is rampable.

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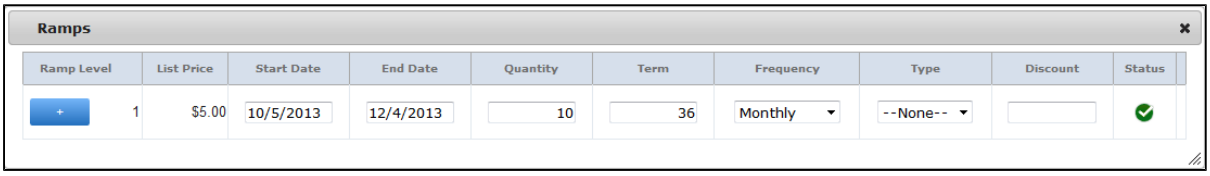
To create the price ramp on the pricing cart page

Enable Price Ramp, must be selected for the product items in the pricelist.

You must be on shopping cart page.

1. Click on a line item. A ramp overlay is displayed.



If your admin has checked **Enable Auto Ramp Creation** while configuring the price list item for this product, the system automatically enables price ramp on the second charge type, when price ramp is enabled for the first charge type on the cart page.

Limitations: Please note that if you have chosen a custom frequency, you might see the following in the latest release:

- Option Price of Option ramp line is not added to the respective bundle.
- Selling Term is not calculated as per the Start Date and End Date.

Also, note the following limitations:

- Auto Ramp creation is not available with the new Grid UI.
- Cancelling a ramp line during change operation creates multiple lines.
- A maximum of 50 ramp lines can be created in the current release.

2. Specify the price ramps for a product as described below:

Option	Description
Ramp Level	Displays the number of the levels in the price ramp for the selected product, which are generated automatically.
List Price	Displays the selected products list price.

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Option	Description
Start Date	Displays and allows you to specify the starting date of the usage period for a level in the price ramp for the selected product.Note: Start Date must be before Ending Date.
End Date	Displays and allows you to specify the ending date of the usage period for a level in the price ramp for the selected product.
Quantity	Displays and allows you to specify the quantity of the selected product for a level in the price ramp.
Selling Term	Displays and allows you to specify the selling term.
Selling Frequency	Displays or allows you to define the usage period for a level in the price ramp for the selected product by specifying its term and the type of period.
Adjustment Type	Displays or allows you to specify the adjustment type for a level in the price ramp for the selected product.
Adjustment Amount	Displays or allows you to specify the adjustment amount for a level in the price ramp for the selected product.
Status	Displays the status. A **X** red icon is displayed to indicate an issue.

3. Click and click select **Save Ramps**.

The price ramp for an option is created and added. If the ramp is on a bundle or standalone product, each ramp line becomes a line in the shopping cart.

You can add multiple ramp levels to the selected product by selecting Add Row or remove by selecting **Remove Row**.

Auto Ramp Creation dialog box is not aligned correctly in IE browser with the current release.

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If you have bundle and option product for auto ramp with more than one ramp line. In addition, Auto Cascade Quantity flag is checked, hence when you increase quantity against bundle ramp line and reprice, you expect the same quantity to be reflected for respective ramp lines under option as well. However, you can observe that only first ramp line gets updated with the new quantity.

Defining Tiered Pricing

Tiered pricing is used to establish rates for a future usage. There is no pricing until you know the future usage.

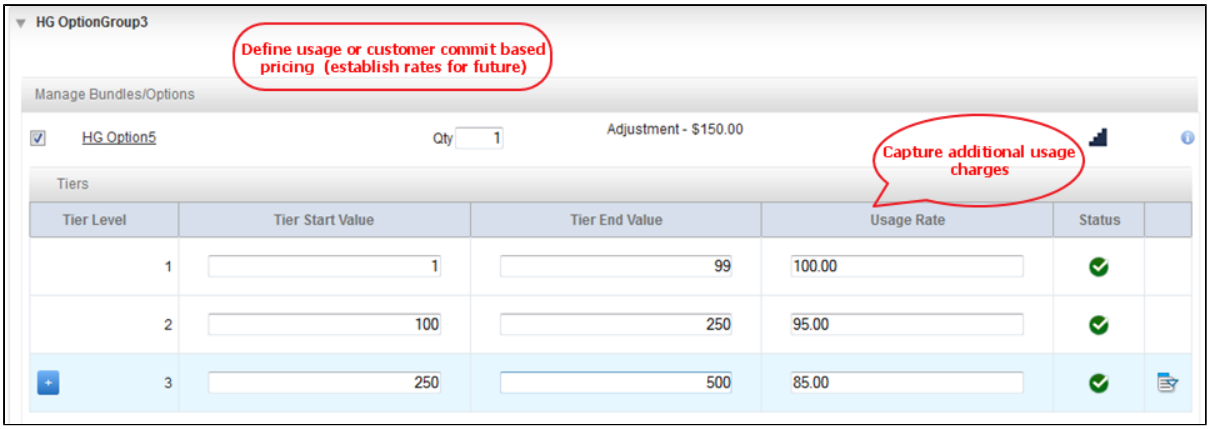
Here is an example: In a cell phone plan, you are quoted possibly a tiered plan of $/minute for various blocks of time that you agree to pay. At the end of the billing cycle, the carrier will use the tier to determine the actual rate to apply to the minutes consumed and present you the bill for payment. At the time of quoting, only the rate is established.

If you have defined price matrices, the tiered pricing for a product is inherited from there. If you make any adjustments on the line item that has a tiered rate defined, the adjustments apply to tiered rate and also affect the price matrices.

> ⓘ You cannot create ramps and tiers both for an option.

To define tiers

1. Select a product on the options/configuration page. The tiers table appears below the selected product.



2. Type a mandatory **Tier Start Value** and **Tier End Value**.

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> Ensure that the start and end values do not overlap. For example, the range must be 0-100, 101-200, and so on

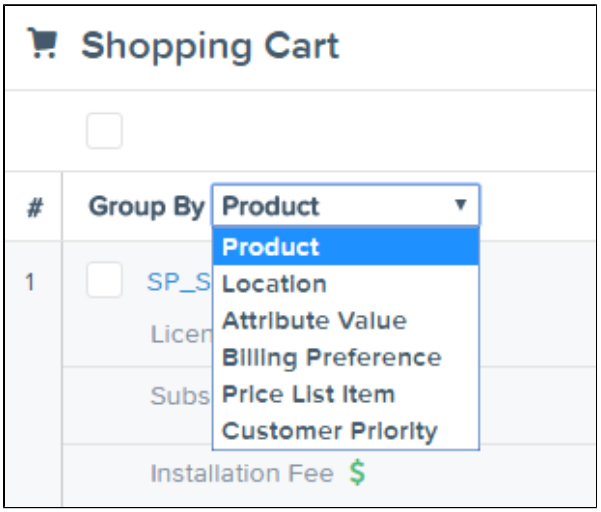
3. Type a mandatory **Usage Rate**.
4. To add more tier lines, click the or icon, and select **Add**.

A new tier line is added in the tiers table.

Sub totaling by group in the Cart

A product group is a high-level grouping of the products. Product groups enable you to categorize the products which are displayed on the cart page. When you select the group level check box, Apttus CPQ auto selects all the products in the group and allows you to select line items and perform actions such as *Copy*, *Remove From Cart*, and *Mass Update*. You must specify the API names in the **Config System Properties > System Properties > GroupBy Fields** in the admin guide . These line item fields can be of the Lookup, Text, and Formula types.

Viewing subtotal at the group by cart level: You can view the subtotals of the cart by a group, so that you can make decisions while applying adjustments at the group line item. When you view a cart by the group, you see the relevant sub totals as separate line item. Group by subtotal has the similar columns as Cart Line Item display columns.



Applying Promotions on the Products in the Shopping Cart

Out of the 2 options available to apply promotions in the new release, you can either apply the promo code on the cart page or the system applies the promotion once your criteria is met.

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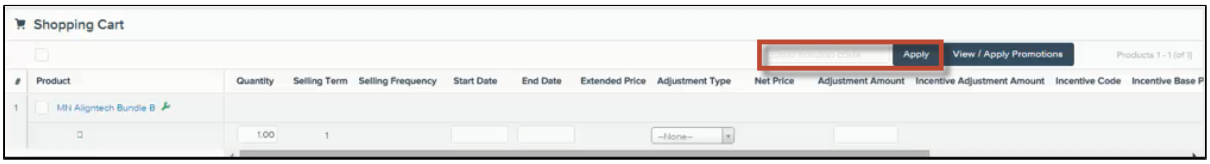
PULL promotion: You can manually view the available promo codes and apply one or more promo codes to your line item (product level) and to the entire cart.

PUSH promotion: This type of promotion is applied to your line items (products) or to your entire cart when the entry criteria for the promotion is met for the selected products and the entire cart. The system automatically updates your pricing for respective products or cart, depending on the promotion applied.

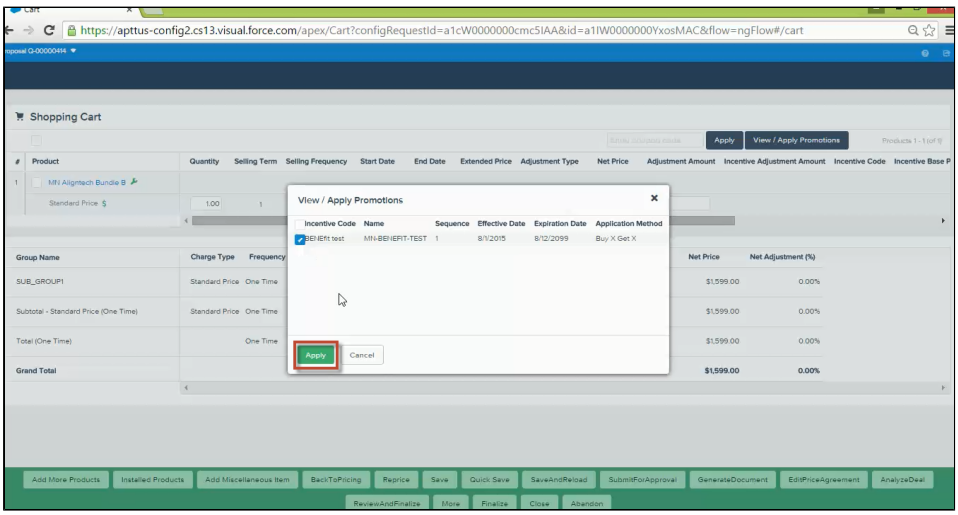
To manually apply a promo code on the Shopping Cart

You must have a cart that contains products for which you can apply promo codes.

1. If you have a Coupon or promotion code handy, enter the code and click **Apply**.



2. To view the promotions available for this account and the selected products, click **View /Apply Promotions**.
3. Select one or more promotions from the list and click **Apply**.



The pricing on the cart is updated automatically to include the benefits of the promotions you apply. The **Incentive Adjustment Amount** denotes the adjustment amount which is applied using the promo code.

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After applying promotions on your cart, you can now proceed to add more products or save and finalize the cart.

Editing a Price Agreement

After product selection and configuration, you are redirected to the Shopping Cart page. The **Edit Price Agreement** button enables you to add and set prices for a product that are to be associated with your contract. When you renew your contract or regenerate a contract the defined price agreement prices are applicable.

To edit a price agreement

1. On the Shopping Cart page, click **Edit Price Agreement**.
2. Click **Add More Products** to add products the contract.
3. Select the products from the list and click **OK.** You can also search for the product using Product Name, Product Code, or Product family**.**
4. Specify the quantity range for the product in the **From** and **To** fields. To define product quantity ranges, such as 1-20, 21-50, click +.
5. Specify the **Start** and **End Date** ranges during which the product is valid.
6. Specify the **Unit Price**, **Flat Price**, and adjustments if any for a specific quantity range.
7. Click **Save**.

After you finalize the agreement and are redirected to your contract, the price agreement that you save will be associated with your contract as the new Price List.

Contract Pricing

Contract Pricing in CPQ enables you to store contracted prices in the system. When a quote is created in CPQ, the quote price is determined by looking up the price defined in the Contract. Contract price list is a subset of the standard price list. This implies that when the same product is defined in multiple contract price lists, the former contract takes precedence. Contract Pricing is supported for standalone and bundles. Contract Pricing for Options is supported provided options are defined in the same contract price list as the bundle. Options cannot be in a different price list. Options inherit the contract price list from the bundle.

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To select a contract pricing list

You must have an existing contract pricing list.

1. Navigate to the **Proposals** tab and select a proposal.
2. From Configure (Contract Pricing), click **Configure Products**.

You have selected to configure products having contract pricing.

Finalizing a Product

This is the final step before taking the finalized set of products and prices back to the Quote /Proposal.

You can review the cart and its pricing and if you are satisfied with the configuration and pricing, you can finalize the cart.

To finalize the cart

You must click the **Reprice** button to accept any pending changes in pricing. You must also resolve any validation errors that may appear due to validation rules.

1. On the Cart page, click **Review and Finalize**.

   > The **Review and Finalize** button on the Cart page keeps you on the same page without finalizing the configuration. This feature has been deprecated.

2. To confirm the product configuration and pricing, and return to the Quote/Proposal detail page, click **Finalize**.

The Quote/Proposal page appears with all the product configuration and pricing information.

If your product contains Usage Tiers and Attributes, there might be a delay for the system to create these records while you land on the Quote/Proposal page. You must wait for the system to finalize the configurations before going for document generation or asset creation.

After the quote is finalized, the quote/proposal page appears. If any workflow processes have been setup to trigger approvals based on criteria, they will typically occur at this point, and the **Approval Stage** inside the Quote/Proposal record will be set to **Approval Required**. As soon as the

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Approval Stage changes, the **Submit for Approval** button becomes available and you can submit the Quote for approval to management if any approval processes have been configured. Once approved, the Quote/Proposal is generated and presented.

Re-validating the Product Configuration

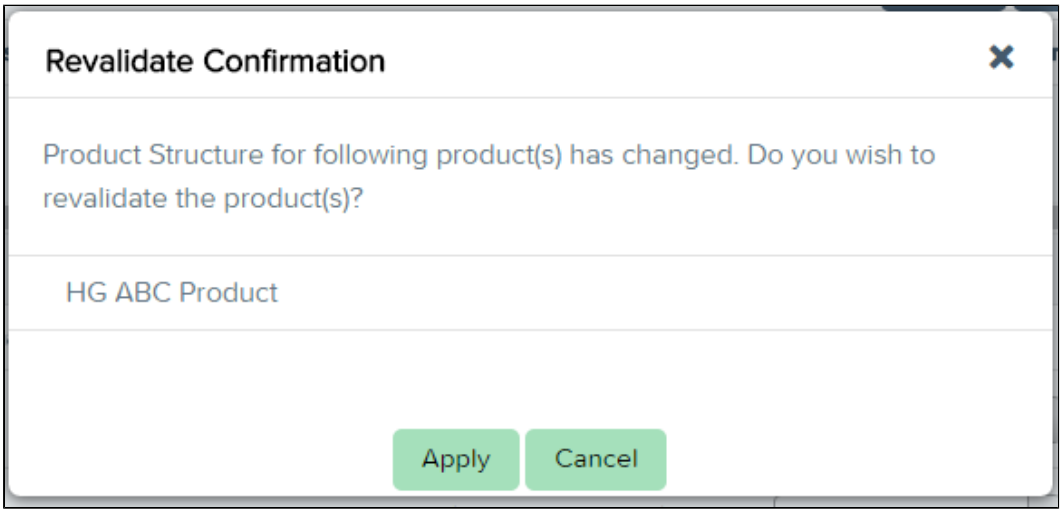
You can re-validate your saved quote for the product structure changes. Saved quote created in the past might have a product for which structure or rule has been changed. This can affect the validity of such quote when you re-open the configuration.

In the current release, Re-validation includes:

- Changes to the product structure, such as addition or deletion of options.

To re-validate the cart

1. When you click **Revalidate** on the Cart page, a popup is displayed in which you see the products whose structure is changed.



2. Do one of the following:
    a. Click **Apply** to accept the changes. Products whose structure is changed will be marked as *Pending Configuration* and you must reconfigure such product before proceeding.
    b. Click **Cancel** to proceed with the previous structure of the product.

You see the **Revalidate** button on the previously saved Cart page when the Admin has made changes to the Product Configuration and has updated the Version field of the product.

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When you click **Revalidate**, Apttus CPQ shows *No records to display* message in case if there is no change in the product structure.

Displaying revalidation messages

When a price list item for the bundle or options is revalidated, the system warns you with the message that some items may get changed upon revalidation.

A system displays the following revalidation messages based on the business scenarios.

For example,

- When an optional product is removed from a bundle, the system shows the message: `"Product Structure for the following product(s) has changed. Do you want to revalidate the product(s)?"`
- When a line item is expired, the sytem shows the message: `"The following line items have invalid price list items. During revalidation, some items in the cart may change or be removed."`
- When a version is changed in the quote, the system shows the message: `"Some items in the cart may have changed. Please revalidate the cart."`

For more information, see Field Set Settings in the admin guide.

Using Guided Selling

Guided Selling is a process that helps you to choose the product best fulfilling your customer's needs. The goal of guided selling is to provide you a way to figure out which product to sell to a customer. You need to answer a set of questions around your customer’s needs and based on your answers, the system recommends products. This way, you can quickly select the right product to meet your customer’s needs.

To use guided selling

Prerequisite: You must be on the product catalog page.

1. Select a category and click **Guided Selling**. A set of questions appears (one or more pages of questions).

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2. Select an answer from the available choices for the questions and click **Next**.

After you have finished answering the questionnaire, the system retrieves and displays the products matching your customer's needs in the **Recommended Products** section.

You can either configure a product from the recommended products section, by clicking **Configure** or add a product to the shopping cart by clicking **Add to Cart**.

Using Refine your Search

When you are selecting items from the Product Catalog, **Refine Your Search** enables you to narrow the list of products to those that match your search filter questions.

Search filters are associated with categories, so that the *Refine Your Search* questions may change when you select different product categories. The questions are also found in the product record, which is how the Product list gets refined. When you select an answer to a question and that answer matches the answer on the product record, that product is included in the filtered Product list.

> **Note**
>
> For a product to be displayed on the Catalog page, it must match all of the selected Refine Your Search criteria.

To configure your system to use Refine Your Search you must complete the following:

Configure the custom fields	Two custom fields need to be created. The field for Search Attribute Values is used to provide the search question and answers, which will be associated with a category. The field for Products is used to have the same search question and answer values available on the product record.
Configure Search Filter Fields	This makes the custom field available from the *Search Filter Fields* list in the Hierarchy Manager . This must be completed so that the custom field can be associated with a specific category.
	This task associates the custom field with a specific category and adds it to the Refine Your Search window in the Product Selection page.

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Configure refine search options	
Select a search field value for a product	So that using *Refine Your Search* provides useful and relevant filtering, you should select a value for each search field on a product record.

The following configuration tasks, will use a refine search question example in the screenshots (How many seats will you need?) to help show how the feature is built.

To refine your Search

You must have configured Custom fields for each search question.

1. Select a Quote/Proposal and click **Configure Products**.
2. On the Catalog page, search for a product. Based on your selected category, all the products are listed in the Product Catalog section.
3. The **Refine Your Search** window displays the search filter questions. Select a value to answer the questions that best match your requirements, and based on your selection, the list of products are further filtered to narrow down the list.

The displayed products list will refresh to only display those products which match the search criteria. Products must match all criteria to be displayed.

Additional selections you make in the Refine Your Search window will further filter the products list.

Using the Product Comparison Feature

Product comparison allows you to compare features of multiple products on the catalog page enabling you to narrow down to products that best fit your customer's needs.

To compare multiple products

1. On the Catalog page, select more than one product to compare.

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2. Click **Compare Products**.

A Product Compare page appears listing the selected products and its features in the tabular form. You can show/hide the products to display on the comparison page.

- The system indicates the number of products that you have chosen to compare inside parenthesis on the **Compare** button. This helps you keep a counter of the number of products chosen for comparison on different pages on the catalog page. After product selection, the system also indicates how many products you have chosen for comparison, as *'n' selected*. The products can be chosen from different categories also.
- You can remove a product from the selection by clicking icon adjacent to each product.
- The products are listed in the Compare Products selection dialog box based on the order of your selection and not in an alphabetical order.

To go back to the catalog page, click **Return to Catalog**.

The **Return to Catalog** button now takes you back to the last category that you had browsed for product selection. For example, you had selected Product 1 from Category A and Product 2 from Category B. Once you are on the Product Comparison page, clicking **Return to Catalog** takes you to Category B and the catalog page (containing all the categories).

Using Proposal Document Generation

Generating a Quote/Proposal and sending the Quote/Proposal to the customer should be easy and intuitive. Proposal Doc Gen provides the ability to select a template, select the output format, merge the Quote/Proposal document with additional documents and sequence them, email the collated file with attachments and preview the different versions of documents. As a Sales Rep, you can invoke the new wizard from the cart as well as from the Quote/Proposal header page.

This reduces the number of clicks and provides an integrated experience from the shopping cart as well as the Quote/Proposal header. All the functionality resides in a single page application that is smooth and easy to use.

Consider the following scenarios where this feature can be very useful:

Use case 1: After confirming the product selection and pricing, as a Sales Rep, you would like to instantly generate a Quote/Proposal from the Shopping Cart, merge some marketing material and product data sheets with my generated Quote/Proposal and send the document in an email to the customer.

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User case 2: After receiving the email that my quote (that I had submitted earlier for approval) has been approved, you want to quickly generate the Quote/Proposal document, merge some marketing material and product data sheets with my generated proposal and send the document in an email to the customer.

During the proposal workflow, the system detects the acceptable file type (For instance, . docx, .doc, .pdf) and displays distinct icon for the file format.

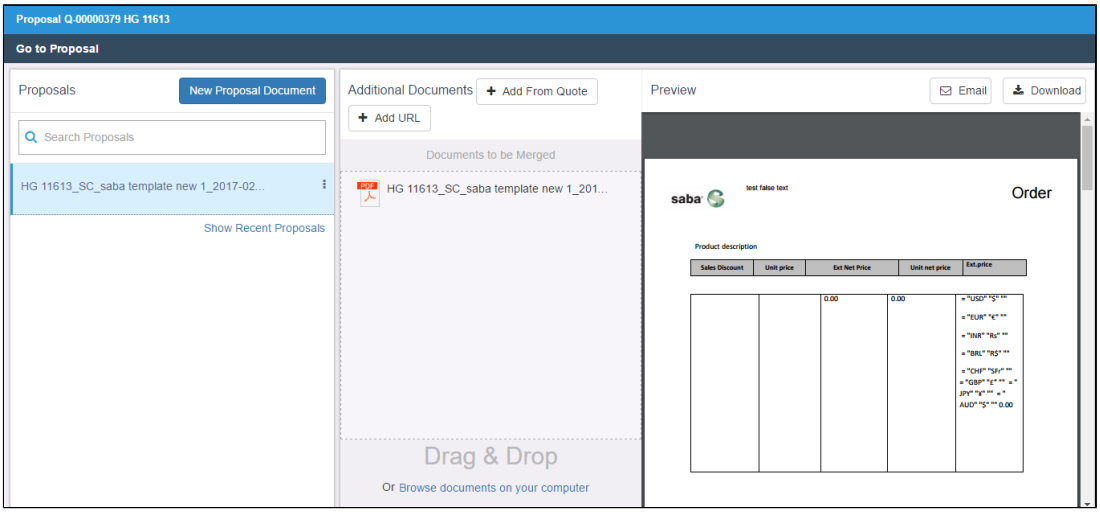
Also, when you try to merge a file with unsupported forrmat or the file size is more than 4 MB, the system alerts you with an error message.

Process flow:

- **Accessing the Doc Gen Wizard**
  You can access the Doc Gen Wizard from the Quote/Proposal header by clicking **Send Proposal** button, which is available with the proposal management package.

Hint

If you do not find the **Send Proposal** button on the Quote header page, use **Edit Layout** to bring the button to your page layout.



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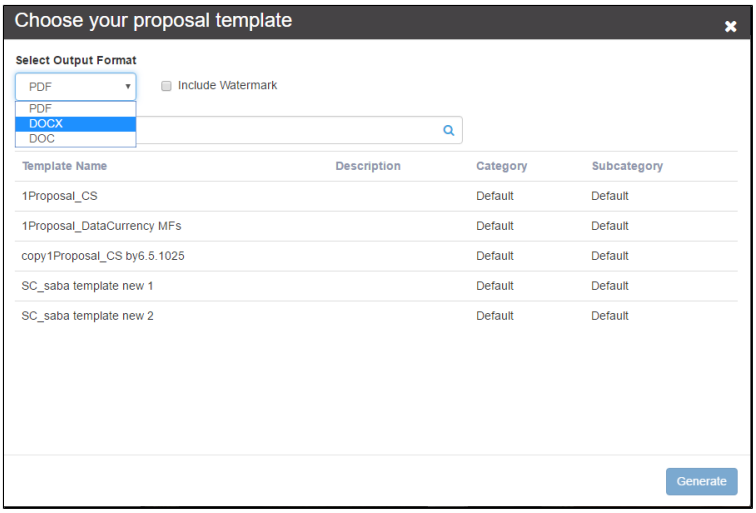
You can also access this wizard from the cart by clicking **Send Proposal**. The major two differences in accessing the Doc Gen Wizard from the cart are that you must choose a proposal template to generate a proposal document and you get quick access to action buttons, such as **Go to Pricing**, **Add More Products**, **Installed Products**, and **Go to Proposal** below the Quote/Proposal name.

- **Generating a Quote/Proposal document**

  When you click **New Proposal Document**, a new dialog box appears where you can choose the default template or search for any queried templates for your Quote/Proposal document (filtered using Query Templates). You can also choose the Output Format for your document. Only *doc*, *docx* and *pdf* formats are supported, depending on the format your admin has configured, using Proposal Document Output Format. Using Proposal Document Output Format, if you've chosen *docx* and *pdf*, the drop-down list here shows both. If you do not define any format, the system takes *pdf* as the default output format. Use the **Generate** button to generate a new Quote/Proposal document. The **Generate** button is disabled until you choose a template. As soon as the Quote/Proposal document is generated, the system displays the document in the Preview mode on the right pane.



The Quote/Proposal document generated using the Doc Gen Wizard follows the naming convention as: *Quote/Proposal Name + Template Name + Date stamp*. Such documents appear in the left pane of Proposal Doc Gen wizard and as attachments in the **Notes & Attachments** related list.

- **(Optional) Previewing generated documents and merging with additional documents**

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Once generated, the system automatically previews the generated document on the right pane of the window. In case of mulitple documents, you can also preview such documents by clicking the name of the generated document. Note that Preview is available only for documents created in *PDF* format.

Add from Quote

You can also attach additional documents to the Quote/Proposal by clicking **Add from Quote**. This button fetches all the documents (that are not generated using Proposal Doc Gen) from the **Notes & Attachments** related list of a Quote/Proposal. Select a document and click **Add to Merge Docs** to allow the system to consider this document for merge with the generated Quote/Proposal document. The merging happens only after you click **Merge Documents** on the right pane.

Use **Browse to documents on your computer** to attach any offline documents from your local storage. You can simply drag and drop an offline document to the Doc Gen wizard and the system considers it for merging with the Quote/Proposal document.

Add URL

You can add document hyperlinks from external sources and merge them with the Proposal. Click **Add URL** to launch a pop-up that gives you the ability to enter valid document hyperlinks and its corresponding Title. You can add multiple URLs by clicking **Add Another** link at the bottom of the pop-up.

> **Note**
>
> Ensure that you have added the endpoint for the document URL that you want to list on the Proposal Doc Gen from **Setup** > **Security Controls** > **Remote Site Settings**.

As soon as you attach more than one document to your Quote/Proposal (apart from the generated Quote/Proposal), the right pane of the window grays out and enables a single button called **Merge Documents**. You can choose to merge all the generated and offline documents in the **Documents to be Merged** section and turn them into a single document. After your documents are merged, the system displays the collated document in the Preview pane on the right. The merged document appears as a record under the **Document Collate Infos** related list on the Quote/Proposal.

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- **Sending the generated document to the customer**
  After the sales rep has reviewed, merged and finalized the content in the final Quote /Proposal document, he can send the collated document to the customer for further actions. Buttons like **Email** and **Download** are available for the following purposes:

Action button	Usage
Email	Use this button to send the Quote/Proposal (or merged) document to your customer for review. The new dialog box allows you to enter information like, email addresses for To, CC, BCC fields, Subject, choose an Email Template and Email Folder, and add any additional documents. The system by default populates the email information of the **Primary Contact** field in the **To** field. The **Mark Proposal as Presented** ensures that the status of the Quote /Proposal is changed to *Presented* as soon as you send the Email.

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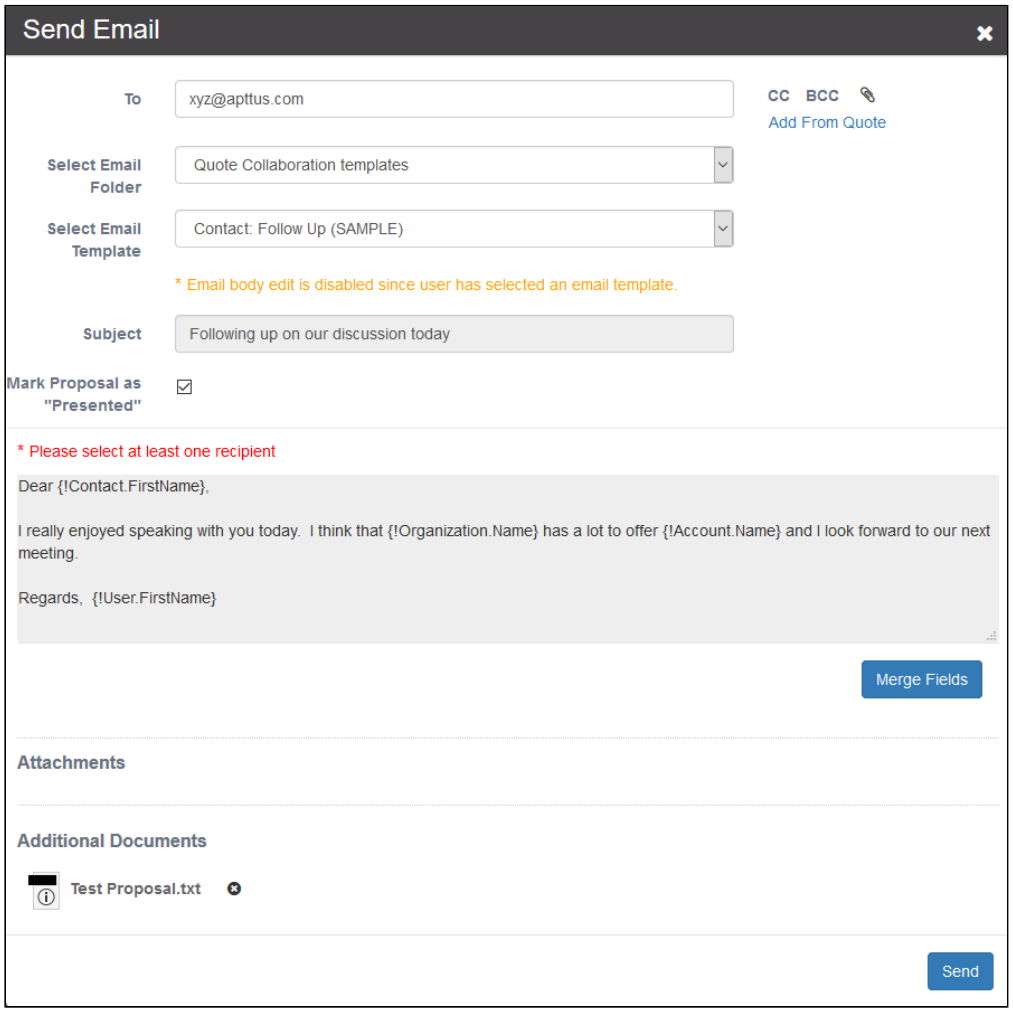
Action button	Usage
	
Download	Use this button if you want to download a local copy of the generated Quote /Proposal (or merged) document.

Configuring Document Generation Preview Setup in Internet Explorer

In order to preview the generated document in Internet Explorer v11, you need to download the Acrobat Reader or any other PDF viewer and follow the steps mentioned below.

Configuring Default Viewer for IE

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1. From Start menu, select **Default Programs**
2. Click **Associate a file type or protocol with a program**
3. Find the .pdf in the list of file types and select it. Click **Change Program**
4. Select the desired application from **Open with** dialog box, and click **OK**

This is a one-time setup to associate the application for document generation preview.

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Generating and Presenting a Quote/Proposal

- Auto-Synching Cart Line Items to a Quote
  When Auto-sync is turned on, the system does validate for errors and auto-syncs the cart lines with the Proposal Lines.
- Generating a Quote/Proposal
  This scenario guides you to generate a Quote/Proposal document based on the information you provided.
- Presenting a Quote/Proposal
  After generating a proposal document, it is presented to the trading partner. The system sends an email with the generated Quote attached.
- Reprice Quote
  Use the Reprice Quote feature to reprice all the parameters with a single click from the Quote/Proposal page.
- Analyse Quote
  Use the Analyse Quote feature to examine the price waterfall chart and understand the product cost breakdown.

Auto-Synching Cart Line Items to a Quote

When Auto-sync is turned on, the system does validate for errors and auto-syncs the cart lines with the Proposal Lines. You can view the synced line items in the Quote/Proposal detail page under the Line Items related list. Auto-sync is done when following conditions are satisfied:

- No error produced by validation callback
- No Constraint Rules error
- No line items in price pending state
- No Must Configure product is in configuration pending state

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Generating a Quote/Proposal

This scenario guides you to generate a Quote/Proposal document based on the information you provided.

After the quote is finalized, and if any approval processes have been configured in your organization, the **Approval Stage** changes to **Approval Required**. As soon as the Approval Stage changes, the **Submit for Approval** button becomes available and you can submit the Quote for approval to management. For an overview of the various Approval stages, see Glossary of Apttus Approval Stages.

After the quote is approved by an approver, the Approval Stage changes to *Approved.* You can now generate a proposal document to present to a trading partner. When you initiate the **Generate** action, a screen appears allowing you to select additional information about the document to be generated. Additionally, if document protection has been enabled, a document can be generated with the appropriate protection options.

To generate a proposal document

You must ensure that the Approval Stage is *Approved*.

1. Click **Generate** to generate a Proposal document.
2. From Options > 1. Select Output Format, select one of the following formats:
    - DOC: To generate an MS Word document.
    - RTF: To generate a proposal document in Rich Text Format.
    - PDF: To generate a PDF protected proposal document.
3. To include a watermark across the document, select **Include Watermark**.
4. Select a template from the list, and click **Generate**.

The proposal document is generated and can be found in the **Notes and Attachments** related list. The proposal document is automatically attached to the Quote and can be viewed via the View action link. The Approval Stage changes to *Generated*.

You can now present the quote you generated.

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Presenting a Quote/Proposal

After generating a proposal document, it is presented to the trading partner. The system sends an email with the generated Quote attached.

If the email is sent, the Approval Stage will be automatically be set to *Presented.* If you prefer to print or present the Quote a different way, you can manually set the Approval Stage to *Presented.*

To present a quote/proposal

The Approval Stage must be in *Generated* stage.

1. Click **Present**. The Present Proposal page appears.
2. Select the proposal document to be attached and click **Next**. The **Send an Email** page appears.
3. Enter details as you would for an email and click **Send**. A confirmation popup appears. For more information on email templates and defining custom email templates, see Managing Email Templates. You can select an email template, attach additional files, and perform a spell check before sending an email. The system will prompt whether the email was sent.
4. Click **Yes**.

The email is sent and the **Approval Stage** status changes to ***Presented.*** The **Accept** button is enabled.

After the quote has been accepted by the trading partner, click the **Accept** button.

Reprice Quote

Use the Reprice Quote feature to reprice all the parameters with a single click from the Quote /Proposal page.

Pricing is determined by Quote header level parameters. Normally after the first time Quote configuration is completed, and you were to adjust the Quote level parameters, you had to go back to the shopping cart to Reprice. Doing this one by one and then repricing is time consuming and ineffective. With Reprice Quote button, there is no need to do this, you can change product pricing and/or rules, and click the Reprice Quote button to reprice all the parameters without going to the cart page.

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To reprice a quote from the Quote/Proposal page

You must complete a quote configuration at least once.

1. Navigate to the **Proposals** tab and select a proposal.
2. Click **Reprice Quote**.

All the quote level parameters are repriced on the Quote/Proposal page.

Analyse Quote

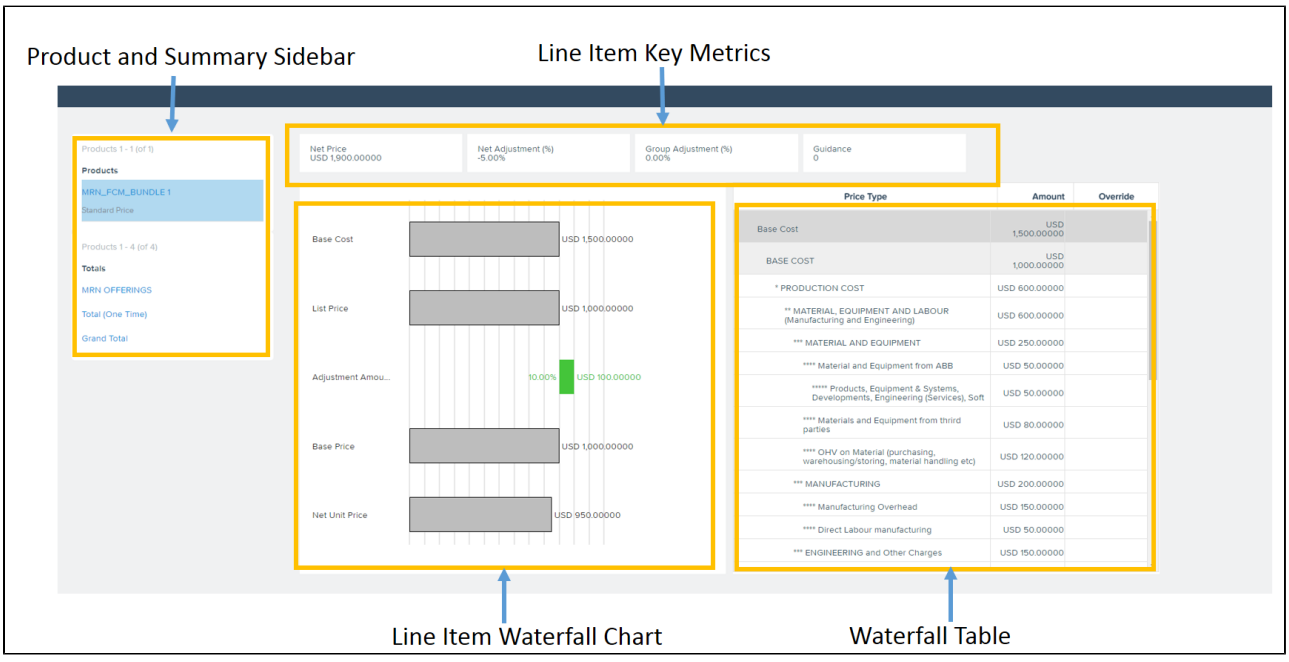
Analyse Quote page helps you to view and manipulate the cost and profitability of each **Line Item** and **Summary Group Item**, one at a time.

Add Analyse Quote button on the Cart

Go to **Config Settings** from (All tabs) > **Display Action Settings** and setup an *action* button for **Analyze Quote**.

Screen Elements

The following illustration shows the Analyse Quote page, calling out the key elements appearing on this page.



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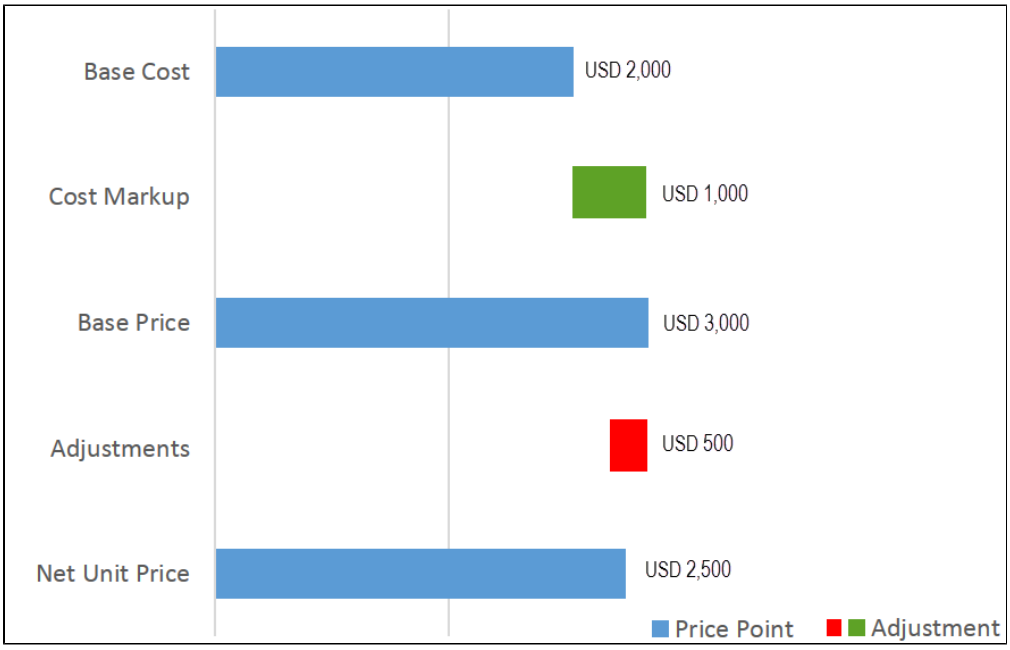
Product and Summary Sidebar: This section displays a list of Line items and Summary Group Items the way you would see it on the cart. You can select any of the line items or the summary groups to see its corresponding waterfall chart and cost breakdown.
All information visible on this page is either for a single Line Item or a single Summary Group Item.

Line Item Key Metrics: Fields that are useful in deriving the costing profitability such as Margins, Discount etc. can be added to this Key Metrics.

Line Item Waterfall Chart: Various Line item Currency fields can be used to plot the Waterfall chart. It is basically a bar chart where Line Item Fields are plotted vertically and their values (Price) are plotted horizontally.

You can see two kinds of bars:

- **Price Point**: These bars begin from the base of the y-axis. Usually the Line Item fields such as List Price, Invoice Price etc. are the Price Points in the Waterfall chart.
- **Adjustment**: These bars are adjustments to the Price Point or Costs. These bars start from the endpoint of the previous bar and based on the type of adjustment, whether negative or positive, their end point is derived. As shown in the following illustration, Cost Markup is an addition to the Base Cost and hence the Adjustment bar starts from the point Base Cost ends. Similarly, Adjustment is a deduction from the Base Price which starts from where the Base Price ends but goes inward indicating a negative adjustment.



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Waterfall Table: This table translates the Waterfall Chart with all cost breakups. You can override certain costs and click **Reprice** to see the Waterfall with revised cost. In the "Amount" field, the currency value is left aligned on the Analyze Quote UI page.

After analyzing the deal, you can also collaborate with multiple users to finalize the pricing. Please refer, Quote Collaboration.

Apttus CPQ uses the Base Price field of Line Item to determine what the Currency Code to be displayed in the Angular UI.

As you do not want Base Cost to be seen by specific users for various reasons but Base Price to be made available to all users. Therefore, Apttus CPQ uses Base Price rather than Base Cost to determine the currency code to be used. The currency code as set in the user locale is displayed for all the currency fields.

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Accepting a Quote/Proposal

After a trading partner has accepted a proposal, you can finalize a quote/proposal by accepting the proposal, synchronizing products and prices with the related Opportunity and then create an Agreement.

After the quote/proposal has been presented to the trading partner either manually or via an email, the Accept button is enabled. Selecting **Accept** signifies that the trading partner has accepted the Quote. If the current Quote is not primary, clicking the **Accept** button will make all other quotes non-primary and the current one primary.

Simultaneously, the line items in the **Summary** related list is synchronized back to Opportunity Products for forecasting purposes.

> The related opportunity must have a Price List associated with it or else the summary items will not synchronize. The products do not need an entry in the Price List, but the Opportunity must be associated with a Price List.

Alternatively, if the synchronization is not required to happen automatically, you can choose when to synchronize with the Opportunity by using the **Make Primary** and **Synchronize with Opportunity** buttons.

To accept a Quote/Proposal

The Approval Stage must be in *Presented* stage.

1. From Actions, click **Accept**. The Approval Stage changes to **Accepted**.
2. Do one of the following:
    - To create an agreement, click **Create Agreement**.
    - To create an agreement with line items, click **Create Agreement with Line Items**.

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- To synchronize the quote with an opportunity, click **Synchronize with Opportunity**.
  Synchronizing Quote/Proposal With Opportunities
  Synchronization ensures that both the Quote/Proposal and Opportunity accurately reflect the current state of the Quote. A best practice for sales pipeline reports and forecasts in Salesforce is to display the amount of revenue and the products or services that are forecasted to be sold.

The contracting process begins with the creation of an agreement. For detailed information, see Apttus Contract Management User Guide.

Synchronizing Quote/Proposal With Opportunities

Synchronization ensures that both the Quote/Proposal and Opportunity accurately reflect the current state of the Quote. A best practice for sales pipeline reports and forecasts in Salesforce is to display the amount of revenue and the products or services that are forecasted to be sold.

Salesforce provides forecast reports that drive off of the amount of the Opportunity and the associated Opportunity product records. Opportunity products are stored in a standard Salesforce object and represent the line items for an Opportunity. When using Salesforce without Apttus, products are added to the opportunity manually or by synching with a standard Salesforce Quote record.

Apttus CPQ can synchronize Proposal Line Items from a Quote Proposal to the related Opportunity.

This action updates the Opportunity Amount and maintains accuracy between the Apttus Quote/Proposal and the Opportunity, both on the record and in reports.

This is especially important if you have configured sales reports using Opportunities with Products. With Apttus, they can continue to use these reports and the deep functionality that Apttus CPQ provides.

When a Quote/Proposal is synced with an Opportunity, the Proposal Line Item records are copied to the Opportunity Products related list. The Amount of the Opportunity will reflect the summed total of the opportunity products. The Sales Price field on the Opportunity Product record is populated by the Proposal Line Item.Net Price field.

While a quote/proposal and an opportunity are synced, any addition or change to the list of products in the quote/proposal syncs with the list of products in the Opportunity.

If a quote/proposal is re-configured and the shopping cart is finalized, the new proposal line items will be copied to the opportunity’s product related list.

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- Assigning a Default Pricebook
  A Pricebook is the standard Salesforce version of a price list or container of products and pricing. In Apttus CPQ, we use the Apttus Price List object as the pricing container. Standard Salesforce synchronization requires that a Salesforce Pricebook is assigned to the Opportunity to enable synchronization between Quote and Opportunity.
- Marking Quotes As Primary
  An opportunity can have multiple quotes, but it can only sync with one quote at a time. The sync process looks for Quote/Proposal records where the Primary field is marked as true.
- Auto Sync and Manual Sync
  The Synchronize with Opportunity action button is visible on a Quote/Proposal that is marked as Primary.

Assigning a Default Pricebook

A Pricebook is the standard Salesforce version of a price list, or container of products and pricing. In Apttus CPQ, we use the Apttus Price List object as the pricing container. Standard Salesforce synchronization requires that a Salesforce Pricebook is assigned to the Opportunity to enable synchronization between Quote and Opportunity. The Pricebook may be assigned to the Opportunity manually or automatically using a trigger. In either case, the Standard Price Book should be used.

To assign a default pricebook

You must have an existing Quote/Proposal created from an Opportunity.

1. Go to the **Opportunities** tab and select an existing opportunity.
2. Scroll down to the Products related list, and click **Choose Price Book**.
3. From the Price Book picklist, select **Standard Price Book**.
4. Click **Save**.

A standard price book is assigned to the opportunity. Go to the Quote/Proposal and make it Primary.

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Marking Quotes As Primary

An opportunity can have multiple quotes, but it can only sync with one quote at a time. The sync process looks for Quote/Proposal records where the Primary field is marked as true.
To ensure that only one Quote/Proposal is marked as Primary at any time, Apttus provides a **Make Primary** action button. The button is conditionally displayed on a Quote/Proposal page if:

- There is an Opportunity related to the Quote/Proposal
- The Quote Proposal is not already marked as Primary

The first Quote/Proposal created on an Opportunity is automatically marked as Primary. When the Make Primary action is invoked with the button on a Quote/Proposal, the Primary checkbox on any other Quote/Proposal related to the same Opportunity is unchecked.

When a second Quote/Proposal is related to an Opportunity, it must be made Primary before configuring and finalizing products.

Auto Sync and Manual Sync

The **Synchronize with Opportunity** action button is visible on a Quote/Proposal that is marked as Primary.

To automatically synchronize Primary Quotes, update the **Proposal System Properties** setting called **Auto Sync with Opportunity**. This setting syncs Quote/Proposals that are marked as Primary each time the shopping cart is Finalized.

Activating an Order

Once you have accepted the Quote/Proposal, an Order is created with the Status = *New*. All the Proposal Line Items are copied to the Asset Line Items and Order Line Items. To proceed further with creating Assets for the products/services listed in your Quote/Proposal, you must activate this Order.

You can activate an Order by following any of the below-mentioned procedures:

- By selecting **Auto-Activate Order** check box on the Quote/Proposal page:
  If you choose this option, once you accept a Quote/Proposal, the Order is created and activated simultaneously.

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- By manually entering an **Order-Activation Date**:
  If you choose this option, you have to manually enter a Date and Time in the **Order Activation Date** field on the Quote/Proposal page.

Once activated, you can see the status of the Asset Line Items and Order Line Items is changed to *Activated*. Refer Managing Assets for more details.

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Managing Assets

Asset Management is based on the order information that you have already defined in your sales quote and the resulting contracts.

When your customers agree to purchase a product, the product changes from an agreement line item to an order line item in Apttus CPQ. The status of the agreement in this stage is *Accepted* and the order is now ready to be activated and realized as an asset for that customer. After you receive payments for an order is when the order line item changes to an Asset line item.

With Asset-based Ordering, you can

- create quotes for new products and services based on existing assets
- create quotes to modify existing products and services
- modify in-process orders that have been submitted for fulfillment
- renew, change, swap, and terminate an existing service
- have visibility into the asset transaction history during customer interactions

After being processed and fulfilled, new quotes and orders result in new assets that are listed on a customer's account and a line item from an asset becomes an Installed Product. You can access the Accounts page to see a customer's information and their purchase history.

The assets are created upon finalization of a Quote/Proposal and/or activation of an Agreement. If your product contains Usage Tiers and Attributes, there might be a delay for the system to create these records on the Proposal Line Items. You must refresh the Quote/Proposal or Agreement page and wait for the system to finalize the configurations before accepting a Quote or activating an Agreement.

An account with Assets has the Asset Manager button. Refer the configuration part and ensure that Asset Manager button is configured correctly in your org. To view the installed products or assets for an account,

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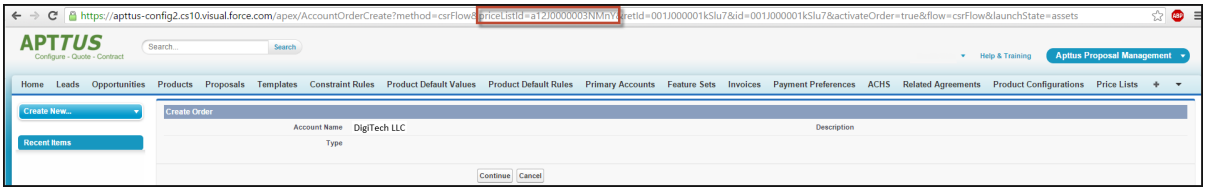
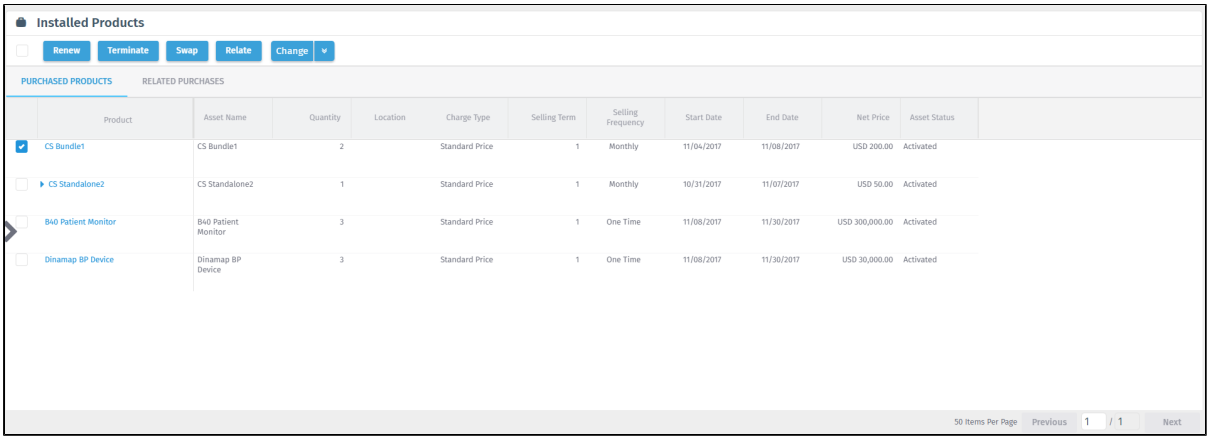
1. Click **Asset Manager**.

2. Verify the **Price List ID** in the URL. Click **Continue**.



3. On the **Installed Products** page, select the assets that you want to manage.



Note

If your administrators have disabled an asset action, the button is grayed out for that asset. For example, from the image above, if your administrator has not defined *Renew* as an allowed action for Advanced Analytics, the **Renew** button is

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grayed out and you cannot renew that asset for this customer. Also, if you select two or more assets from the list of installed products, the **Swap** button is automatically disabled.

The Installed Products page lists all installed assets for the account. Installed products can include both products and services. A line item from an order becomes an installed asset if it is marked as an asset in the product record.

With Asset-based ordering, you can create quotes and orders based on a customer's existing assets. Asset-based ordering is particularly useful when your business offers complex service products, such as phone services and equipment.

On the Installed Products page, you can Renew , Terminate , Swap , and Change an existing standalone, fixed, or a configurable bundle asset. For each transaction involving ABO actions, the system creates a new order while you are navigating on the Cart. The status of the Asset Line Item is not changed until you finalize the Cart and activate the Order containing that Asset Line Item.

The permitted configurations for the Installed Products page can be found in the Installed Product Settings in the admin guide.

Note

Please ensure you add Allowable Actions for assets in order to perform Swap, Change, Renewal or Termination. Refer to Defining permitted actions for Assets section for details.

Use case

For a sales-driven industry with products such as equipment (new purchase) and service (purchased for an equipment), you might want to achieve the following:

- As a manufacturing sales representative, for a service flow, you want to view the **Renew** and the **Terminate** button. For an equipment flow, you want to view the **Change** and the **Swap** button.
- As a subscription sales representative, you want to see the **Renew** button only when I make a purchase for a quote of type *renew*. For an add-on quote or an upgrade quote, you do not want to see the **Renew** button. For example, managing the renewal of a magazine subscription.

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The **Swap** and **Renew** buttons are disabled for the superseded asset line items. Apttus CPQ checks for the **Status** field of related asset line item and disables these buttons for an asset line item on the Installed Products page. This is to prevent a sales rep from using the superseded asset line items in the renewed opportunities and Quote/Proposals.

For example, you have an Asset A and you perform **Change>Config** action to create an asset B. The relation between these two assets in the related asset line item object is displayed as follows:

From	Relation Type (From)	To	Relation Type (To)
Asset A	Is Superseded By	Asset B	
Asset B		Asset A	Is Superseded By

After this transaction, **Swap** and **Renew** buttons are disabled for Asset A.

Asset Pricing

Unless you override the **List Price**, the price of the asset depends on the values you enter for defined the Price List Item fields under the **Tax and Billing** tab. Before you make changes to an asset, consider the pricing settings done on the product PLI.

Please refer Defining Taxes and Billing for a product in the admin guide.

If you select the **Is Asset Pricing** checkbox on the Proposal Line Item detail page, when you Renew, Swap, Change, or Terminate the asset, Apttus CPQ accounts for any list price overrides on the original order to compute the price of the asset.

Accessing the Installed Products page

Before you start using Asset-Based Ordering, you must understand how you, as a Sales and Customer Service Representatives in your organization, can use the ABO functionality.

There are total 3 flows that you can consider for using ABO. Ensure that you understand and choose one of the flows to implement error-free ABO.

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1. Quote/Proposal Flow**:** This is one of the signature events in Asset-based Ordering involving Quote/Proposal.This is the normal flow of going through the Quote/Proposal to an Order and then to the Assets. Once you accept a Quote/Proposal, the Order is generated. Upon activation of the order, assets are created.
2. CSR Flow**:** This is the flow designed to enable the Sales Rep to skip the creation of a Quote /Proposal. No signature event, such as creation of an Agreement or a Quote/Proposal is involved. A new button called **Asset Manager** is configured on the Accounts page to help the Sales Rep navigate directly to the Installed Products page.
3. Contract Flow**:** This is one of the signature events in Asset-based Ordering involving Contracts/Agreements. The assets are created through Contracts/Agreements using the normal Contract lifecycle flow. Once you finalize a Contract (containing Agreement Line Items), the corresponding Asset Line Items are created.

Quote/Proposal Flow

In this flow, you configure the Quote/Proposal and finalize a configuration. Once the configuration is finalized, you present the configuration to the customer. Upon acceptance from the customer, you click the **Accept** button on the Quote/Proposal. An order is created for this Quote/Proposal, which upon activation, creates the Asset Line Items with the *New* status. You can configure the Quote/Proposal again and navigate to the Installed Products page to view all the active assets. No custom triggers are required here.

Flow: Create **Quote/Proposal > Configure Products > Finalize > Accept >** Activate **Order > Installed Products** page.

CSR Flow

There can be scenarios when you do not want to configure the Quote/Proposal again to land on the Installed Products page. For these type of scenarios, you can configure the **Asset Manager** button on your Account page. Clicking **Asset Manager** creates an Order and navigates you directly to the Installed Products page. In this flow, you skip the navigation of going to the Installed Products page through the **Quote/Proposal > Configure Products**.

The following image illustrates the CSR flow from the Sales and Customer Service perspective.

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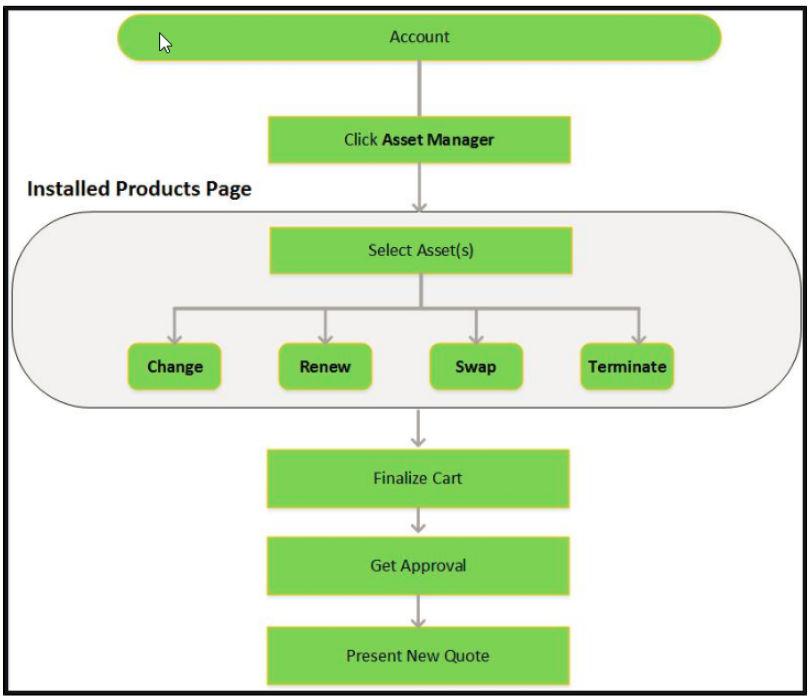

An order remains in the Draft status in spite of the fact that Apttus CPQ displays ready for activation date, hence ABO operation does not get applied on the asset line items. If you keep the status of an order as Draft, you need to Accept the order before starting the CSR flow.

Contract Flow

A contract contains Agreement Line Items, Asset Line Items or Order Line Items. In this flow, you follow the normal Contract Lifecyle flow of creating a Contract, presenting it to your customer and finalizing the Contract. Here, the Asset Line Items are created when you finalize and activate a Contract. Apttus CPQ provides the ability to synchronize the changes in Assets with the changes in a Contract (see details here). The changes you make inside a Contract (such as change in **Contract End Date**) will be reflected in the Assets contained in that Contract. Similarly, when you perform actions on your purchased Assets (such as changing the **Quantity** of an Asset), these changes will be reflected in the Contract.

Flow: Create **Agreement > Configure Products > Finalize** Quote/Proposal **> Accept** Quote /Proposal **> Activate** Agreement **> Installed Products** page.

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Renewing an Asset

Renewals are the most common and effective way to retain existing customers and drive growth and sales for your business. Asset renewals eliminate the scope of pricing errors by extending the agreement. Therefore when you renew an asset, you basically regenerate the asset life-cycle for a new duration.

An asset will be renewed till the date you select from one of the following options:

- Using Proposal End Date
- Retaining the Asset End Date
- Using the Farthest End Date
- Entering a Renewal Date

> **Note**
>
> Please note that for renewal transactions, **Asset Start Date** will always be the *current* **Asset End Date + 1**. The **Asset End Date** is derived from the selected renewal options.

Let us take an example to understand how an asset is renewed based on your selection of the Renewal options.

For an Account 'TierOne', you have created a proposal ‘W3Courses’ which has a Start Date ‘01/01/2016’ and End Date ‘12/31/2017’. The proposal cotains following Assets:

Asset Name	Asset Status	Start Date	End Date	Selling Term
Programming with Python course	Activated	01/01/2016	06/30/2016	6 months
JAVA Learning	Activated	01/01/2016	12/31/2016	12 months
CSS Learning	Activated	01/01/2016	12/31/2017	24 months

Your subscriber wants to renew the subscription for the ‘Programming with Python course’ asset. Let us see how renewal works with each of the options:

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Using Proposal End Date

This option fetches the Proposal End Date from an active proposal which the selected asset is a part of. The Proposal End Date in this example is '12/31/2017' and so the asset will be renewed till this date. Since Asset Start Date will be the current Asset End Date + 1, in this case the Asset Start Date becomes '07/01/2016'.

Asset Name	Asset Status	Start Date	End Date	Selling Term
Programming with Python course	Activated	07/01/2016	12/31/2017	17 months

The asset is renewed for 17 months from a revised date of start. The 'Action' field on Asset Transaction History is set to Renew.

Retaining the Asset End Date

The most common practice is to renew an asset immediately after it expires. This option renews an asset with the same term from its current End Date. For example, if the selling term for an asset is 24 months (2 years), the asset will be renewed for 2 further years after the asset expires.
In this scenario, the Asset is renewed for another 6 months (derived from the Selling Term) from its Start Date.

Asset Name	Asset Status	Start Date	End Date	Selling Term
Programming with Python course	Activated	07/01/2016	12/31/2016	6 months

Farthest End Date

An account will have multiple proposals and assets with varying Start and End Dates and Term. This options picks the farthest end date of an Asset out of all Assets in the Account and sets this date as the End Date of the renewed Asset.
Let us assume that the farthest End Date is '12/31/2018' for an asset in this Account. Now your asset will be renewed as:

Asset Name	Asset Status	Start Date	End Date	Selling Term
Programming with Python course	Activated	07/01/2016	12/31/2018	29 months

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Renewal Date

Instead of pulling a renewal date from various sources, if you want to explicitly specify a Renewal End Date you can do so by selecting this option. If you enter '01/01/2018' as the renewal date, the Asset will be renewed as

Asset Name	Asset Status	Start Date	End Date	Selling Term
Programming with Python course	Activated	07/01/2016	01/01/2018	18 months

Please ensure the Renewal Date entered here is greater than the Asset End Date.

To renew an asset

1. On the Installed Products page, select the assets that you want to Renew.
2. Click **Renew**.
3. To define the **Renewal Date** on the Confirm Renewal page, select one from the following options:
    - **Proposal End Date** - To renew the asset till the date Quote/Proposal ends. The Proposal End Date is displayed next to the option.
    - **Asset End Date** - To renew the asset on the date the asset expires.
    - **Farthest End Date** - To choose the farthest end date out of all the Assets for renewal.

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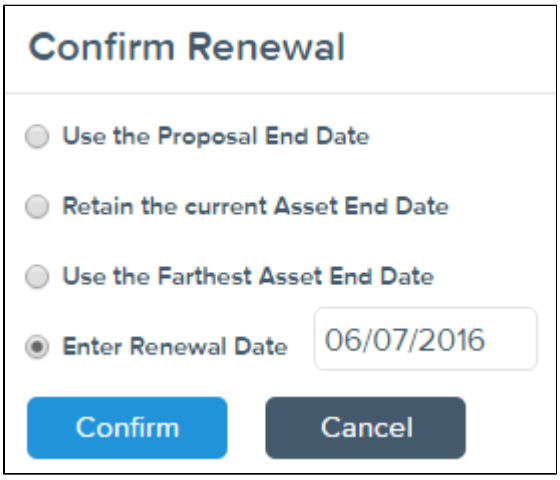
- **Renewal Date** - To pick a date from the calendar for renewal.



4. Click **Confirm** to proceed with the renewal. Asset Status is set to '**Pending Renewal**' on the Installed Products page.
5. Click **Go to Pricing** to apply and load the asset with revised dates on the cart page. While finalizing the original Quote/Proposal, if you have specified the **Renewal Uplift Amount** , you will see the change in the **Net Price** . Click **Confirm** .
6. **Finalize** the cart.

On the Accounts page, you can verify the updated status of the Asset.

Check out how renewal works with Bundle and Standalone Assets.

Renewable products

Apttus CPQ provides the ability to set aside the products that are renewable at the PLI level and control them at the cart or asset level.

- You can define a product as non-renewable at the PLI level and cascade it to the asset.
- If the asset is non-renewable, you must not pull the product into any renewal quote, namely auto or ondemand.
- If the asset is non-renewable, Apttus CPQ disables the renew action.
- If the flag is set to fixed, the product is renewable

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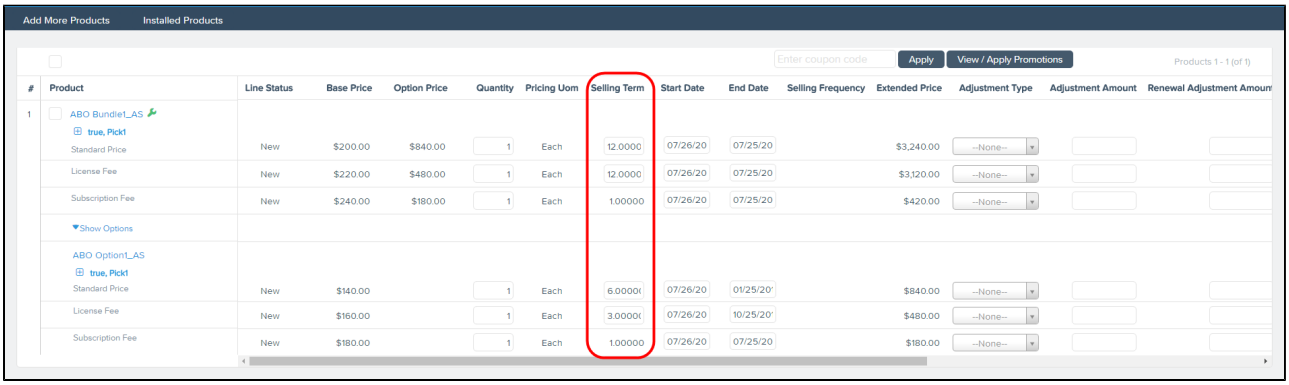
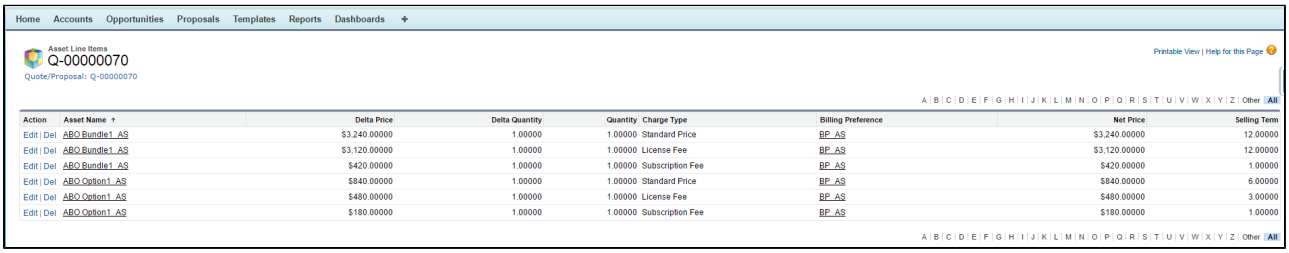
- If the flag is set to fixed, you can pull the product into auto and ondemand renewal quote.
- If the flag is set to evergreen, you must not pull the product into auto and ondemand renewal quote.
- If the flag is set to evergreen, you are not allowed to renew the product manually.

Renewing Bundle Assets

This section describes the renewal process for a bundle asset. The Asset 'ABO Budle1_AS' with 3 different charge types has 2 Options- Option1 and Option2. On the cart, Option1 is selected with 6 months and 3 months of validity for corresponding charge types. You can see the screenshot for details.



The cart is finalized and an order is generated. You can see the Asset Line Items on the Quote /Proposal or from the Account.



Let us see how this Asset is renewed based on the Renewal Option of **Retaining the Asset End Date**.

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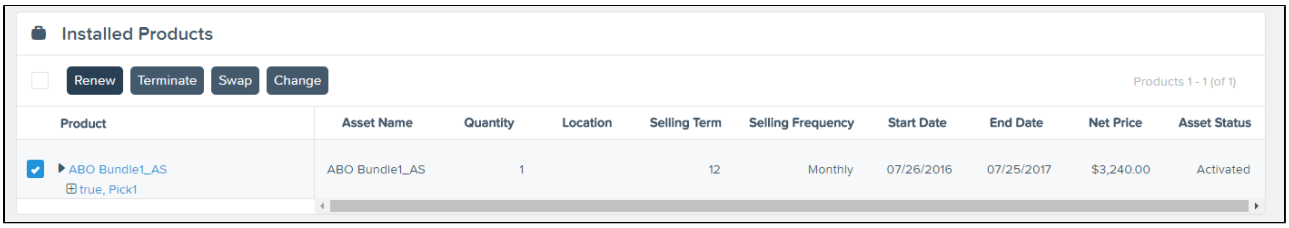
Deriving Start and End Dates

For renewal transactions, **Asset Start Date** will always be the **Current Asset End Date + 1**.

In this renewal option, **Asset End Date** will be the date derived from adding the **Selling Term** to the new **Asset Start Date**.

Before Renewal

Asset	Start Date	End Date
ABO Bundle1_AS	07/26/2016	07/25/2017
Option1	07/26/2016	01/25/2017
Option1 (Different Charge Type)	07/26/2016	10/25/2016



The **Asset Status** on the Installed Products page is **Activated**.

After Renewal

Asset	Start Date	End Date
ABO Bundle1_AS	07/26/2017	07/25/2018
Option1	01/26/2017	07/25/2017
Option1 (Different Charge Type)	10/26/2016	01/25/2017

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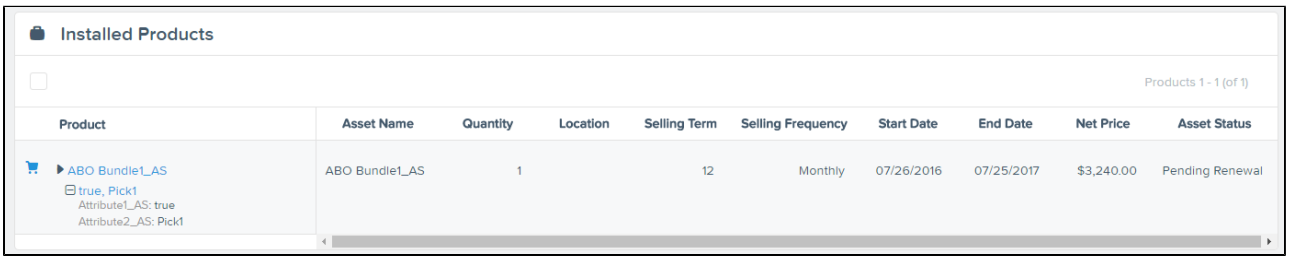
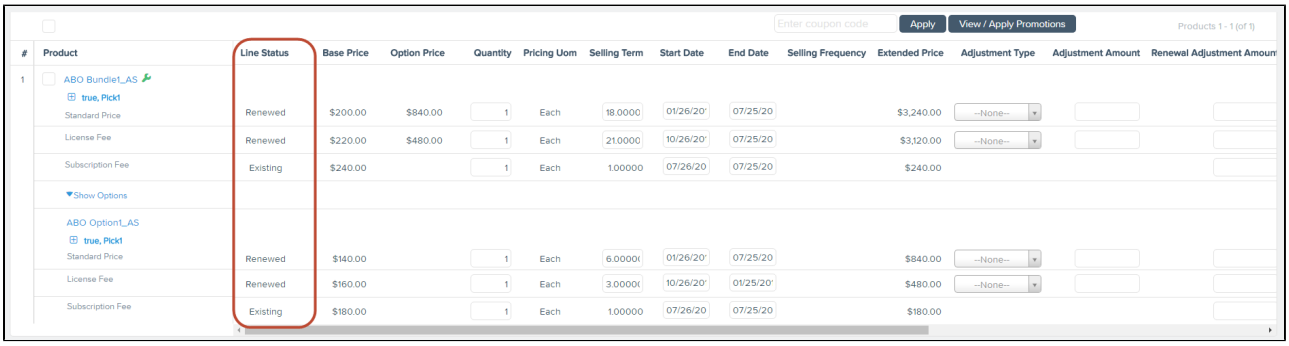


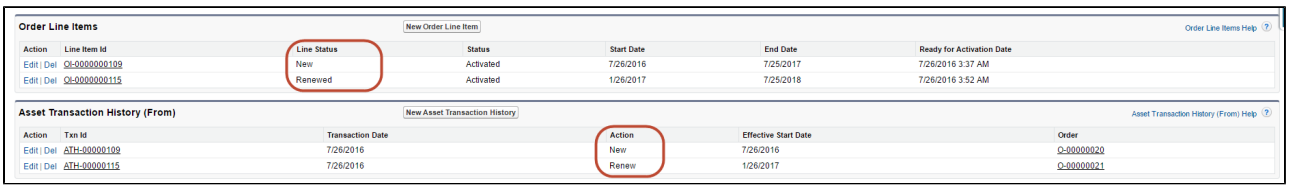
The **Asset Status** on the Installed Products page is *Pending Renewal*. When you confirm and go to the Cart page, the **Status** changes to *Renewed*.



Line Status for one-time products will remain *Existing*.

Impact on Order Line Item and Asset Transaction History

On the **Asset Line Item**, you can trace the renewal activity and modifications from the **Order Line Items** and **Asset Transaction History** Related Lists.



Renewing Standalone Assets

This section describes the renewal process for a standalone asset. The Asset 'ABO Standalone1_AS' has 4 different charge types. You can see the screenshot for details.

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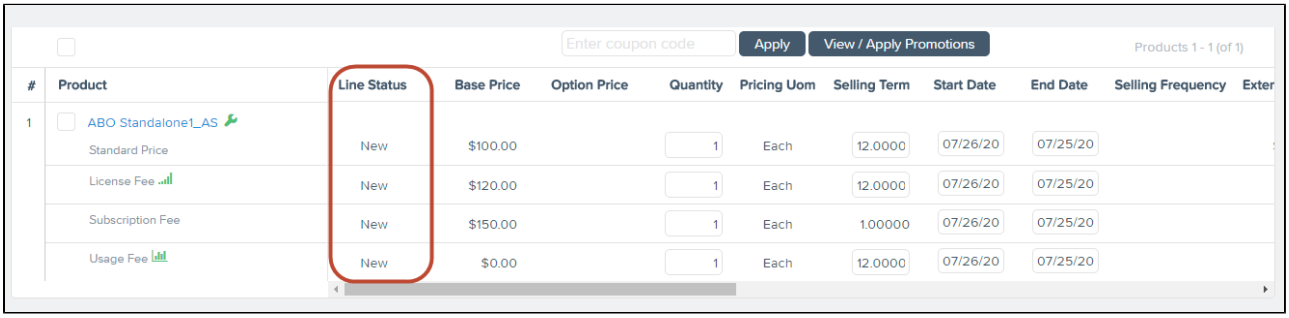
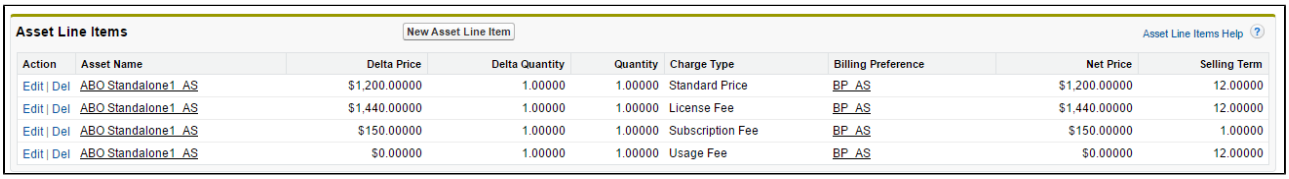


The cart is finalized and an order is generated. You can see the Asset Line Items on the Quote /Proposal or from the Account.



Let us see how this Asset is renewed based on the Renewal Option of **Retaining the Asset End Date** .

Deriving Start and End Dates

For renewal transactions, **Asset Start Date** will always be current **Asset End Date** + **1**. In this renewal option, **Asset End Date** will be the date derived from adding the Selling Term again.

Before Renewal

Asset	Start Date	End Date
ABO Standalone1_AS	07/26/2016	07/25/2017

After Renewal

Asset	Start Date	End Date
ABO Standalone1_AS	07/26/2017	07/25/2018

The **Asset Status** on the Installed Products page is **Pending Renewal** . When you confirm and go to the Cart page, the Status changes to **Renewed** .

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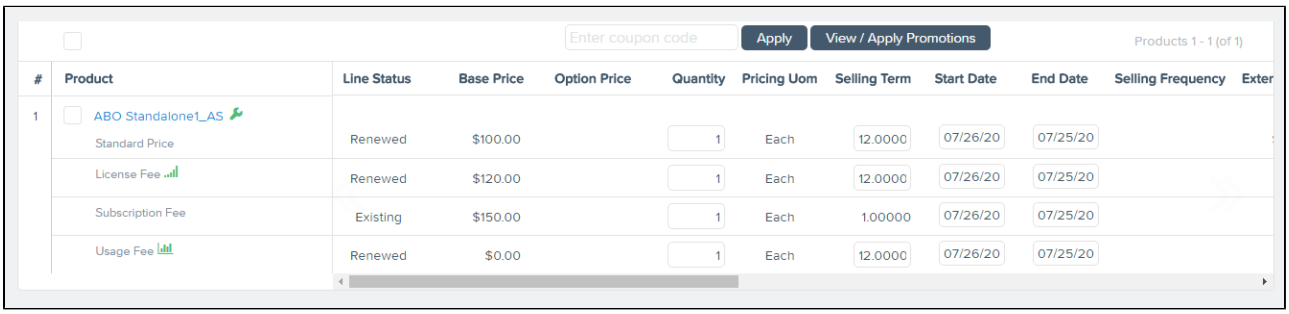
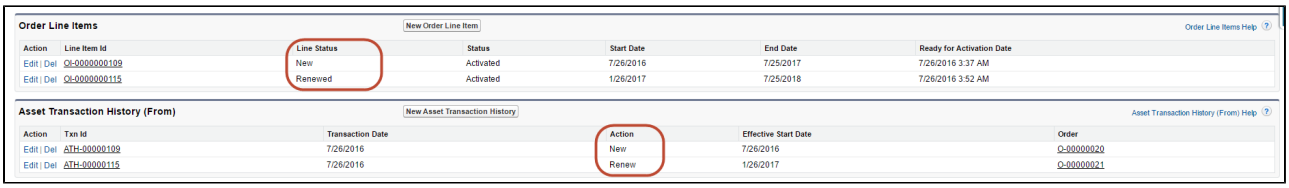


> **Note**
>
> Line Status for One-time products will remain Existing.

Impact on Order Line Item and Asset Transaction History

On the **Asset Line Item**, you can trace the renewal activity and modifications from the **Order Line Items** and **Asset Transaction History** *Related Lists*.



Changing an Asset

With the Change function, you can increase or decrease the quantity of assets according to your customer's requests. Change operation also allows you to change the Start Date, End Date, Selling Term, Billing Rule and other fields on the cart for both, Standalone and Bundle assets.You can update the value of several fields on your cart under a single Change action, for a given Asset.

Of the various parameters you can change, following are the most commonly updated fields:

- **Change Quantity:** If you update the quantity of an asset, this update will be reflected as an amendment in the current Asset Line Item. A new line item will not be created for this change.

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You should specify an absolute value for the **Quantity** field regardless of an increment or decrement in the actual quantity. For example, if you want to increase the asset quantity from 100 to 120, you should enter 120 and not 20. Therefore you must enter the total quantity you want as a result of the change action.

- **Change Start Date:** Updating Start Dates indicates the date from which the change is effective. If you update both the Quantity and the Start Date, the updated quantity will come into effect from the given start date.

  For example, an Asset with 100 Licenses has a **Start Date** of 01 January 2016 and **End Date** of 31 December 2016. As part of the **Change** action, Start Date is set to 01 March 2016 and Quantity is increased by 30. This means, from 01 January to 29 February customer has 100 Licences and starting from 01 March till the End Date, the number of Licenses are 130.
  Please note that prior to the new date, asset will remain in its previous state and will be billed accordingly. The older information will *not* be deleted or overwritten.

- **Change End Date**: You can update the End Date to extend or shorten the asset validity. On updating the Asset End Date, the existing Line item is amended.

> **Note**
>
> For any **Change** action on the asset, **Net Price** indicates the price of the Asset as seen from the **Start Date** to the **End Date** on the cart.

Let us take a look at the procedure to change an asset.

To change an asset

1. For example, you want to change the Quantity and Selling Term for a standalone asset. On the **Installed Products** page, select the asset you want to update and click **Change**.

   You can rename the **Change** button as per your business requirement. The functionality remains the same and only the label is renamed. Refer to Customizing Display Actions for more details

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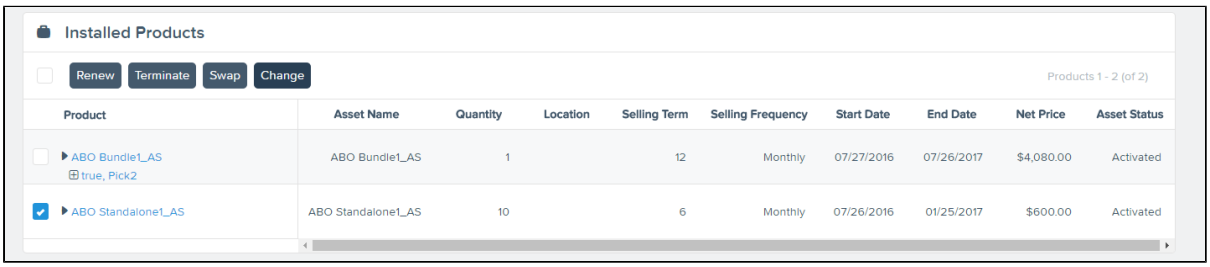
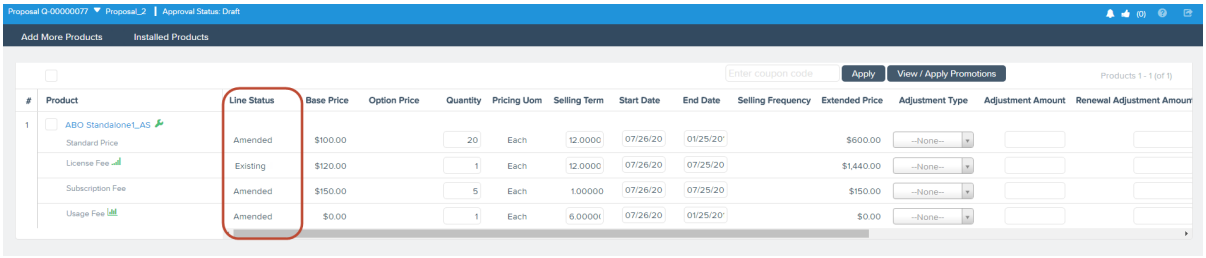


2. On the cart page, **Line Status** changes to *Amended*.



You can change one or more of the following parameters:

Parameter	Description
Attribute Value	To change the Attribute value, click the **Wrench icon** ( ) next to the asset. You will see the **Product Attributes** page. Select the new attribute value and click **Go to Pricing** to load the cart page.
Option	Expand the Show Options tree and select the from the listing of the options to display all Product Options. From the resulting list, select the option with which you want to replace the original product option.
Quantity	Enter the number of units of the product your customer wants to purchase.
Adjustment Type	If you want to adjust the price of the asset, select an adjustment type.
Price	Enter a value that is the amount your customer is charged for the product without accounting for taxes and other charges.

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Parameter	Description
Start Date	The date you want to start billing your customer for this purchase.
End Date	The date you want to stop billing your customer for this purchase.
Billing Frequency	Select one of the following options **Monthly** - To generate a bill once every month **Quarterly** - To generate a bill once every three months **Half-yearly**- To generate a bill once in the middle of a calendar or financial year **Yearly** - To generate a bill once every year **Usage** - To generate a bill based on usage For details, see *Billing Frequency* in the Billing Management Guides.
Billing Rule	Select one of the following options **Bill in Advance** - To bill your customer before the product is delivered **Bill in Arrears** - To bill your customer after the product is delivered **Bill on Ready for Billing Date** - To bill your customer with a consolidate invoice, on a day of their choice.
Billing Preference	Select a predefined billing preference. For details, see *Billing Preference* in the Billing Management Guides .
Payment Term	Lookup and select a predefined Payment Term so your customers know that they must pay outstanding charges within a stipulated time. For details, see *Payment Terms* in the Billing Management Guides.

3. Click **Reprice** to view the changed price and **Finalize** to go back to the Quote.
4. The status of the changed asset changes from *New* to *Amended*.

Impact on Order Line Items

The status of the asset changes to *Amended* on the Order Line Item.

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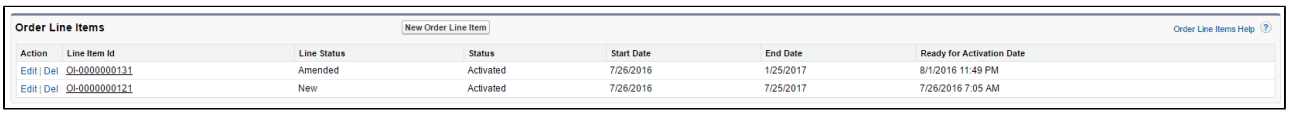
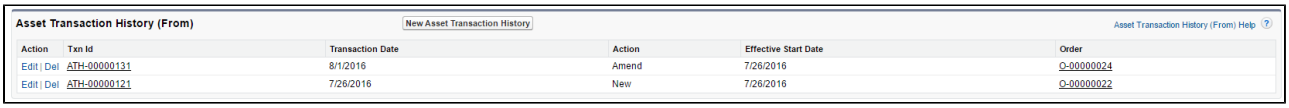


Order Line Items — New Order Line Item — Order Line Items Help

Action	Line Item Id	Line Status	Status	Start Date	End Date	Ready for Activation Date
Edit | Del	OI-0000000131	Amended	Activated	7/26/2016	1/25/2017	8/1/2016 11:49 PM
Edit | Del	OI-0000000121	New	Activated	7/26/2016	7/25/2017	7/26/2016 7:05 AM

Impact on Asset Transaction History

A new entry for the **Change** action is added as to the Asset Transaction History as *Amend*.



Asset Transaction History (From) — New Asset Transaction History — Asset Transaction History (From) Help

Action	Txn Id	Transaction Date	Action	Effective Start Date	Order
Edit | Del	ATH-00000131	8/1/2016	Amend	7/26/2016	O-00000024
Edit | Del	ATH-00000121	7/26/2016	New	7/26/2016	O-00000022

To check the status of your assets, the Status Category of the proposal must be **Accepted**. To view the assets, select the account of the proposal and navigate to Asset Line Items (Sold To) related list.

Every change you make to an asset, impacts its Billing Schedule. If the asset is usage based, then it impacts the associated Usage Schedule as well.

> **Note**
>
> Even though you can extend your asset's validity using **Change**, it is recommended that you perform **Renewal** action for explicit renewal purposes.

Mass update for Assets

From the **Allow Mass Change** setting on the **Installed Products Settings** under **Custom Settings** page, you can enable or disable mass changes for *must configure* assets on the Installed Products page.

Action	Allow Mass Change	Type of the Asset	Type of selection	Behavior
Change	Unchecked	Must Configure	Single Select	Launch configure product page
Change	Unchecked	Must Configure	Multi Select	Disable Change
Change	Unchecked			Disable Change

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Action	Allow Mass Change	Type of the Asset	Type of selection	Behavior
		Combination of Must configure and not must configure	Multi Select	
Change	Unchecked	Not must configure	Single Select	Load into cart directly
Change	Unchecked	Not must configure	Multi Select	Load into cart directly
Change	Checked	Must Configure	Multi Select	Load into cart directly
Change	Checked	not Must Configure	Multi Select	Load into cart directly
Change	Checked	Must Configure	Single Select	Load into cart directly
Change	Checked	not Must Configure	Single Select	Load into cart directly

Changing a Configurable Bundle Asset

You can change the parameters of a bundle asset, much like you do with a standalone. On the Installed Products page,

1. Select the Bundle asset that you want to change and click **Change**.
2. To view the Options, click the **Show Options** list below the product name.
3. From the list of displayed options, select the checkboxes for options you want to include and uncheck the selected option you want to remove.

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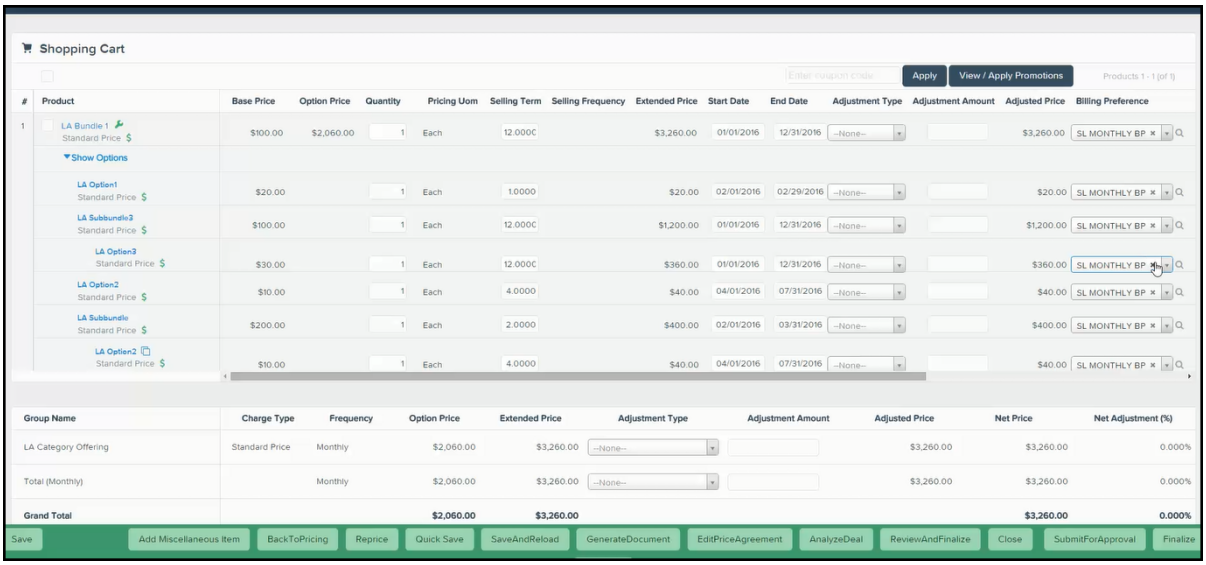

> **Note**
>
> For Change: Configuration, note the following limitation:
>
> - Terminating an asset from the original start date results in incorrect **Net Price** for the changed and upgraded asset line items.

4. Manually enter values for the fields described in the Changing an Asset page.
5. Click **Reprice** and then **Finalize**.

You have successfully created a new order with different product options.

Changing the Attributes of an Asset

Similar to a Line Item in the Quote to Cash flow, that starts as a Cart Line Item, progresses to the Proposal, Agreement, Order, and finally the Asset Line Item, the Attribute values that you define for each Product, are copied to the Proposal Product Attribute values object, Order Product Attribute values object, and the Asset Product Attribute values object.

You can customize the product configuration on your cart based on the Product Attribute values that you define. For more information, see Attribute-based Configuration in the admin guide.

You can view the Product Attribute values that the Asset Line Item inherits from the cart, on the Asset line item detail page.

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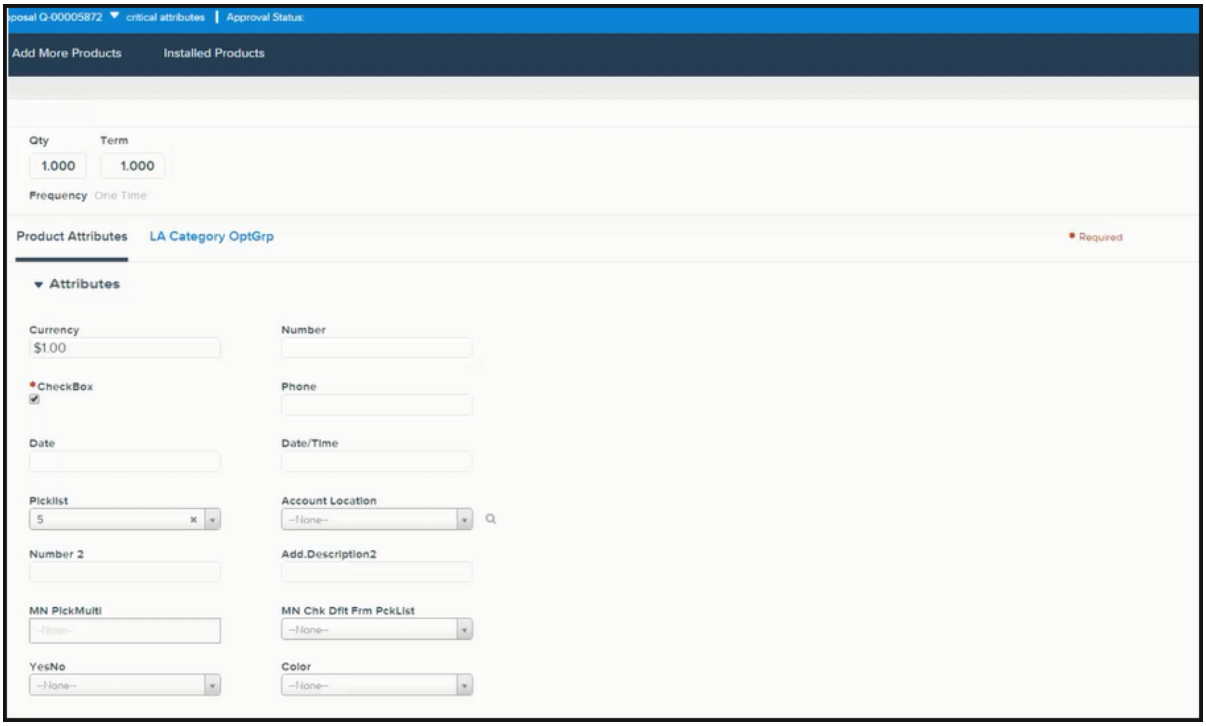
To change the Attribute values for an asset,

1. On the Installed Products page, select an asset and click **Change**.
2. On the Product Attributes section, enter the values of the Attributes that you want to change.



3. Select the **Required** check box.
4. Select the Options page or click **Go to Pricing**.

Note

Only those Attributes for which you select the **Is Primary** check box on the Attribute Configuration page, are shown in the Product Attributes section of the Installed Products page. These attributes are called Critical Attributes.

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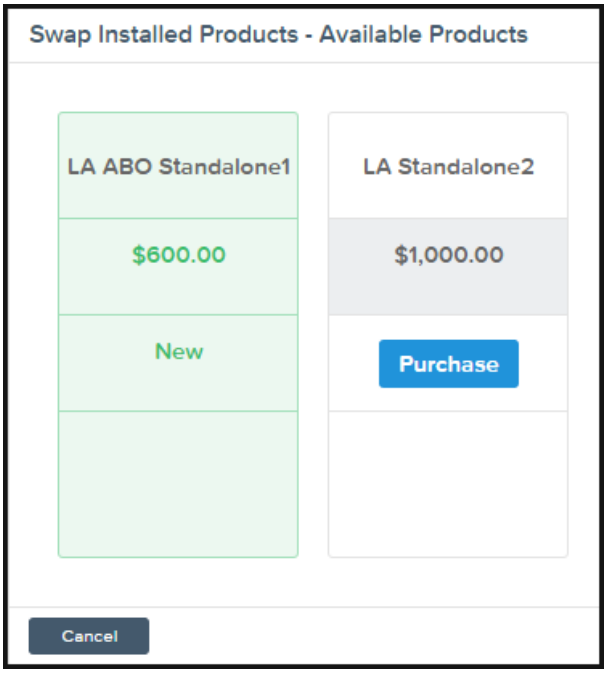
Swapping an Asset

The Swap feature allows you to exchange an existing asset with a predefined alternate asset. You can also upgrade one asset with the next version of the asset. You can swap a standalone, bundle, and an option product. Swapping of a product depends on the Product Replacement Constraint Rule that is set by your administrator.

From the example discussed earlier, your subscriber wants to upgrade from the Beginner level of the Business Intelligence course to the Advanced level.

To swap an asset

1. On the **Installed Products** page, select the product that you want to swap.



2. Select the product from **Available Products** section.
3. Click **Purchase**.

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4. Select the date from when you want the Swap to be effective, and click **Calculate**.
   If the **Start Date** of the swapped asset is a future date, a validation message is displayed to enter a valid **Start Date**. For example, an asset A with **Start Date** = 1 Jan, 2017 and **End Date** = 31 Jan, 2017 is swapped with a product B on June 5, 2016. Instead of taking June 6, 2016 as **Start Date** for product B, the system shows a validation message that the **End Date** of product B should be after the **Start Date** of product A.
5. View the Description and the Difference in the Original and the New Product.
6. To proceed with the Swap, click **Confirm**. Click **Back to Selection** to go back to the last page.

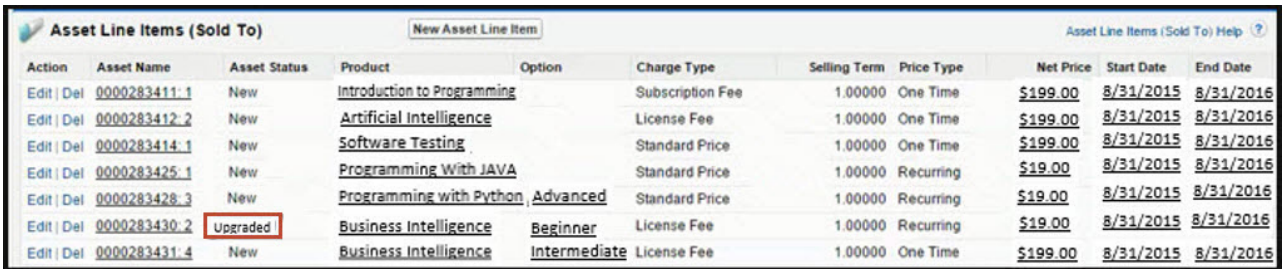
> **Note**
>
> If you select multiple assets on the Installed Products page, the Swap button will be disabled.

7. Click **Finalize** to go back to the quote.

Field	Description
From	The product that you want to swap for is displayed here.
To	The new product that you want to swap to is displayed here.

The status of the renewed asset changes from *New* to *Upgraded*.

To check the status of your assets, the Status Category of the proposal must be **Accepted**. To view the assets, select the account of the proposal and navigate to Asset Line Items (Sold To) related list.



You can swap an Asset on the same day of its expiry. A new Line Item is created for the swapped product with the same term as the previous asset.

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Mass Update for Assets

From the **Allow Mass Change** setting on the **Installed Products Settings** under **Custom Settings** page, you can enable or disable mass changes for *must configure* assets on the Installed Products page.

Action	Allow Mass Change	Type of Asset	Selection	Behavior
Swap	Unchecked	not Must Configure	Single Select	Enable swap and land on intermediate page
Swap	Unchecked	Must Configure	Single Select	Enable swap and land on intermediate page
Swap	Checked	not Must Configure	Single Select	Enable swap and land on intermediate page
Swap	Checked	Must Configure	Single Select	Enable swap and land on intermediate page
Swap	Checked	Must Configure	Multi Select	Disable Swap
Swap	Checked	not Must Configure	Multi Select	Disable Swap
Swap	Unchecked	Must Configure	Multi Select	Disable Swap
Swap	Unchecked	not Must Configure	Multi Select	Disable Swap

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Terminating an Asset

Using the Terminate feature, you can cancel a standalone, fixed bundle, or a configurable bundle asset. You can terminate an asset midway through the selling term. When an asset is canceled, the system captures the Cancellation or Termination Date of an asset on the Line Item object in the **Contract Number** field. The **Contract Number** field captures the information in *CCYY-MM-DD* format which is used by the order and asset to store the Cancellation Date. The appropriate order line items are created and assets are also updated immediately. During billing, the system determines the refund value from the Cancellation Date captured in the asset and refunds accordingly to the customer.

From the example discussed earlier, your subscriber wants to cancel the subscription for the Programming with Python course.

To terminate an asset

1. Click **Installed Products**.
2. Select the products that you want to cancel and click **Terminate.**
3. Enter the **Termination Date.**
   The Termination Date can be in the past, current date or any date in the future. Once you terminate an Asset Line Item (ALI), the status changes to *Pending Cancellation* immediately. Only after you activate the Order containing this ALI, the status of the cancelled ALI changes to *Cancelled.*
4. Click **Calculate** to calculate the difference in billing amount.

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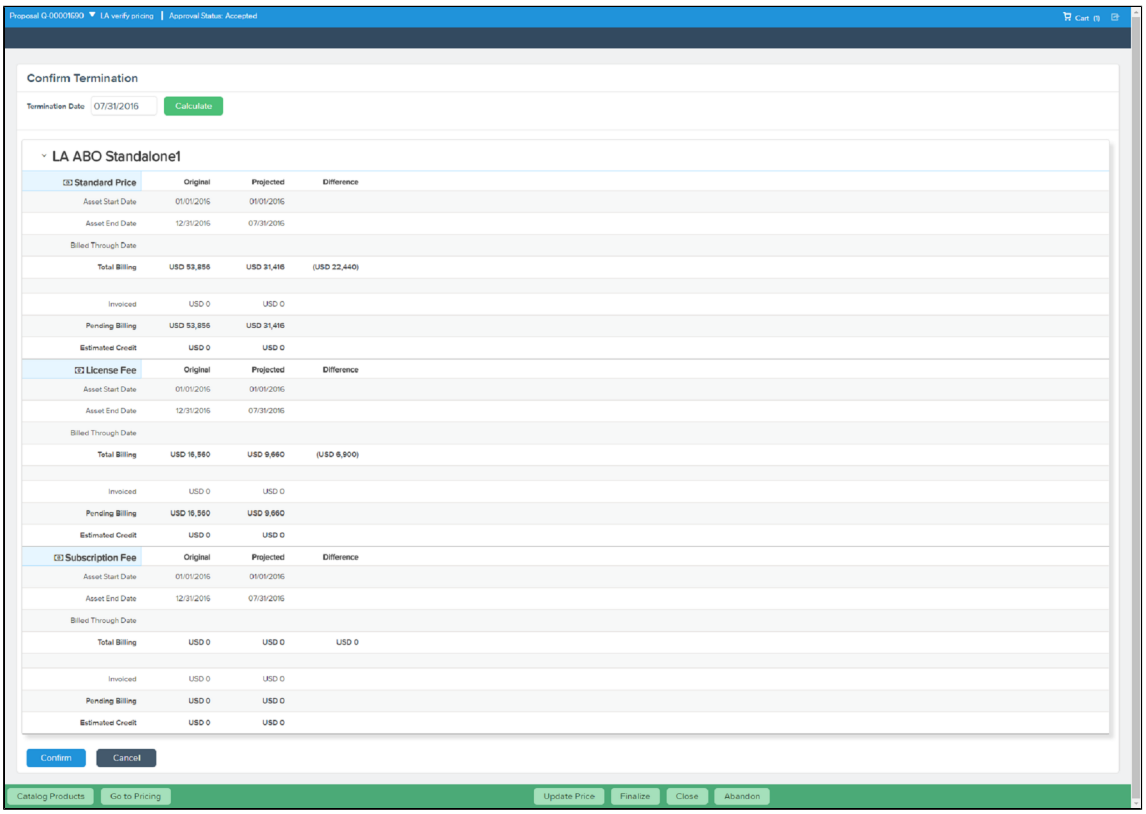

The system shows values for different fields, such as the Pending Billing (Original = the amount you had paid, Projected = the amount to be credited/debited depending on the termination date, and Difference = the difference between the former field values).

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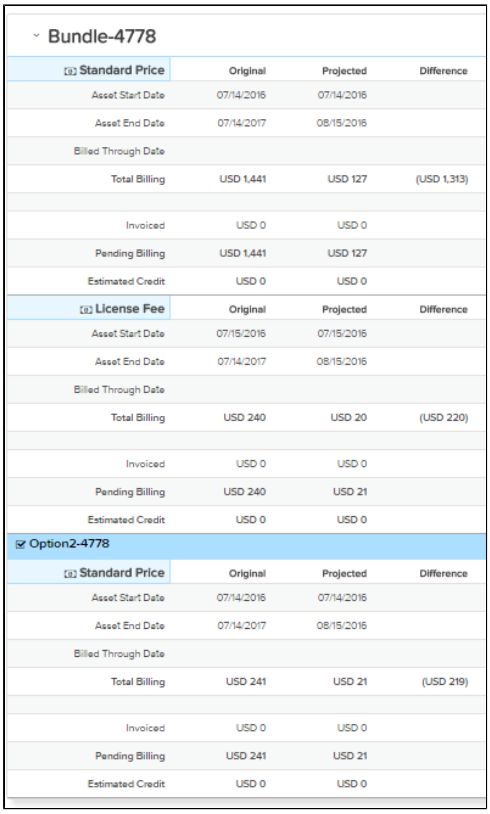
If your product has different Charge Types, the system displays the amount divided among the different Charge Types also. If your product is a Bundle and contains mulitple Options, the system displays the amount divided among the Option products. Also, terminating a bundle cancels all the associated options configured inside that bundle.



Bundle-4778

Standard Price	Original	Projected	Difference
Asset Start Date	07/14/2016	07/14/2016	
Asset End Date	07/14/2017	08/15/2016	
Billed Through Date			
Total Billing	USD 1,441	USD 127	(USD 1,313)
Invoiced	USD 0	USD 0	
Pending Billing	USD 1,441	USD 127	
Estimated Credit	USD 0	USD 0	
License Fee	**Original**	**Projected**	**Difference**
Asset Start Date	07/15/2016	07/15/2016	
Asset End Date	07/14/2017	08/15/2016	
Billed Through Date			
Total Billing	USD 240	USD 20	(USD 220)
Invoiced	USD 0	USD 0	
Pending Billing	USD 240	USD 21	
Estimated Credit	USD 0	USD 0	

Option2-4778

Standard Price	Original	Projected	Difference
Asset Start Date	07/14/2016	07/14/2016	
Asset End Date	07/14/2017	08/15/2016	
Billed Through Date			
Total Billing	USD 241	USD 21	(USD 219)
Invoiced	USD 0	USD 0	
Pending Billing	USD 241	USD 21	
Estimated Credit	USD 0	USD 0	

The Projected and Different amount is calculated simultaneously when you click **Calculate** using the Billing Schedules and Billing APIs. This gives you a quick overview of the difference you have to pay to or receive from an organisation.

For example, if your Asset, priced at USD 1200, contains the **Start Date** as 01/01/2016, **End Date** as 12/31/2016, and **Termination Date** as 07/31/2016, the amount populated in the different fields are:

Original = USD 1200
Projected = USD 300
Difference = USD -900

In order to receive the complete amount as refund for the entire period of an asset, you must select **Same Day Cancellation** custom setting. The system charges you for the period between the Start and End Date of an asset. For example, if your Asset, priced at USD

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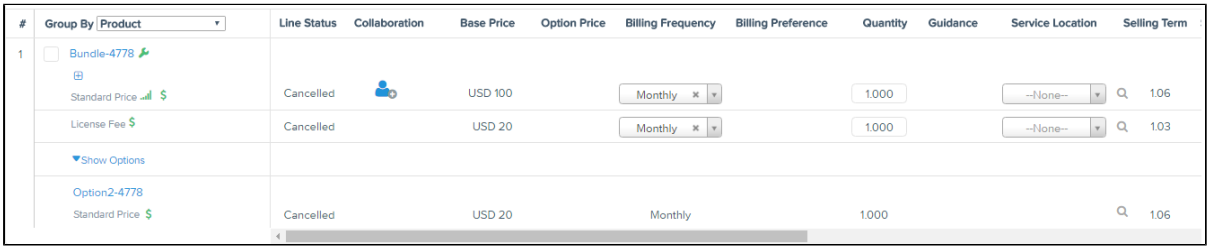
1200, contains the **Start Date** as 01/01/2016, **End Date** as 12/31/2016, and **Termination Date** as 01/02/2016, you are charged for the amount calculated for 01/01/2016 and 01/02/2016.

> The billing impact is shown only if you have Apttus Billing Management package installed in your org. Refer to Billing User Guide for details of each field. If Apttus Billing Management is not installed, the system calculates the different values based on the Calendar dates.

5. Click **Confirm**.
   The status of the cancelled ALIs shows *Pending Cancellation* on the Installed Products page.

6. Go to the Cart and review the following fields and their values.

   Delta Price
   Delta Quantity
   Net Price
   LineStatus



> You can view the change in the **Delta Quantity** and **Delta Price** on the Cart only if you have Apttus Billing Management installed in your org. For the above example, **Delta Price** is shown as USD -900.
> **Delta Quantity** and **Delta Price** is 0 for the following scenarios:
>
> a. Your Bundle or Standalone product has **Charge Type** = *One Time*.
> b. You do not have Apttus Billing Management installed in your org.

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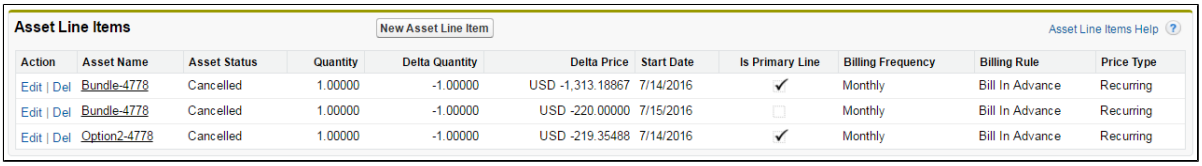
7. Click **Review & Finalize** > **Finalize**.
   Once you finalize the Cart and activate the Order for the terminated assets, you can view the impact on the following fields:

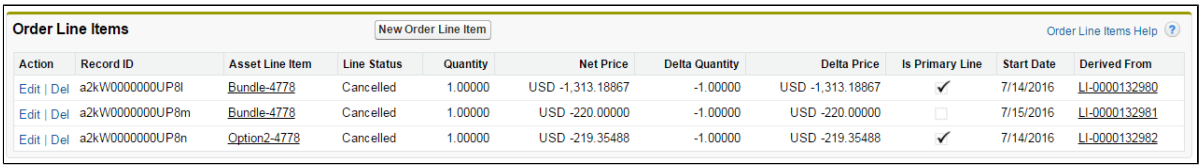
- For an Asset Line Item, **Asset Status** changes to *Cancelled*, **Delta Price** and **Delta Quantity** contain new values.



Asset Line Items — New Asset Line Item — Asset Line Items Help

Action	Asset Name	Asset Status	Quantity	Delta Quantity	Delta Price	Start Date	Is Primary Line	Billing Frequency	Billing Rule	Price Type
Edit | Del	Bundle-4778	Cancelled	1.00000	-1.00000	USD -1,313.18867	7/14/2016	✓	Monthly	Bill In Advance	Recurring
Edit | Del	Bundle-4778	Cancelled	1.00000	-1.00000	USD -220.00000	7/15/2016		Monthly	Bill In Advance	Recurring
Edit | Del	Option2-4778	Cancelled	1.00000	-1.00000	USD -219.35488	7/14/2016	✓	Monthly	Bill In Advance	Recurring

- For an Order Line Item, **Line Status** changes to *Cancelled*, **Delta Price** and **Delta Quantity** contain new values.



Order Line Items — New Order Line Item — Order Line Items Help

Action	Record ID	Asset Line Item	Line Status	Quantity	Net Price	Delta Quantity	Delta Price	Is Primary Line	Start Date	Derived From
Edit | Del	a2kW0000000UP8l	Bundle-4778	Cancelled	1.00000	USD -1,313.18867	-1.00000	USD -1,313.18867	✓	7/14/2016	LI-0000132980
Edit | Del	a2kW0000000UP8m	Bundle-4778	Cancelled	1.00000	USD -220.00000	-1.00000	USD -220.00000		7/15/2016	LI-0000132981
Edit | Del	a2kW0000000UP8n	Option2-4778	Cancelled	1.00000	USD -219.35488	-1.00000	USD -219.35488	✓	7/14/2016	LI-0000132982

Once cancelled, the system selects the **Inacitve** flag for the ALIs with *Cancelled* status so that these ALIs do not show on the Cart for the successive ABO actions.

The status of the cancelled asset changes from *Pending Cancellation* to *Cancelled*. The Billing Schedules for a cancelled asset are cancelled on the same day of cancellation. This is achieved using a flag called, **Same Day Cancellation**, available at **Setup > Develop > Custom Settings > Billing System Properties > System Properties**. When checked, the Billing Schedules for a cancelled asset are marked with *Cancelled* status on the same day of cancellation. If not checked, the Billing Schedules for a cancelled asset are marked as *Cancelled* on the day after an asset was cancelled.

Apart from the **Terminate** action, following are the scenarios when the status of the ALI changes to *Cancelled*:

- While using **Change** action, if you deselect an Option product (inside a Bundle product) and finalize the Cart containing this Bundle Product. The status of the ALI for Bundle product will show as *Amended* and that for the Option product will show as *Cancelled*.
- While using **Swap** action, if you replace a product with an another product, the status of the ALI for the former will show as *Cancelled*.

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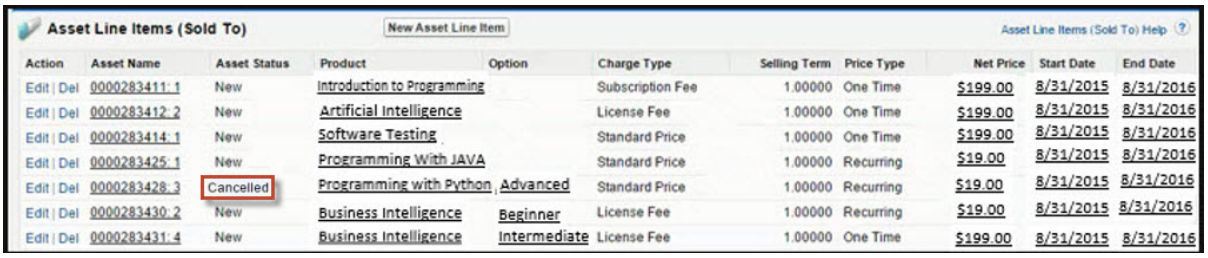
To check the status of your assets, the **Approval Stage** of the Quote/Proposal must be *Accepted*. To view the assets, select the account of the proposal and navigate to Asset Line Items (Sold To) related list.

A new entry is also made in the Asset Transaction History related list. Refer Asset Transaction History for more details.



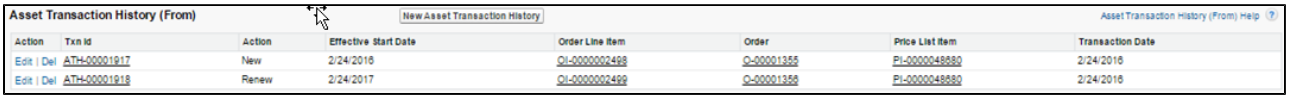
Asset Line Items (Sold To) — New Asset Line Item — Asset Line Items (Sold To) Help

Action	Asset Name	Asset Status	Product	Option	Charge Type	Selling Term	Price Type	Net Price	Start Date	End Date
Edit | Del	0000283411: 1	New	Introduction to Programming		Subscription Fee	1.00000	One Time	$199.00	8/31/2015	8/31/2016
Edit | Del	0000283412: 2	New	Artificial Intelligence		License Fee	1.00000	One Time	$199.00	8/31/2015	8/31/2016
Edit | Del	0000283414: 1	New	Software Testing		Standard Price	1.00000	One Time	$199.00	8/31/2015	8/31/2016
Edit | Del	0000283425: 1	New	Programming With JAVA		Standard Price	1.00000	Recurring	$19.00	8/31/2015	8/31/2016
Edit | Del	0000283428: 3	Cancelled	Programming with Python	Advanced	Standard Price	1.00000	Recurring	$19.00	8/31/2015	8/31/2016
Edit | Del	0000283430: 2	New	Business Intelligence	Beginner	License Fee	1.00000	Recurring	$19.00	8/31/2015	8/31/2016
Edit | Del	0000283431: 4	New	Business Intelligence	Intermediate	License Fee	1.00000	One Time	$199.00	8/31/2015	8/31/2016

Viewing the Asset Transaction History

The **Asset Transaction History** related list on the Asset Line Item detail page displays information for every Asset based Order. For every ABO action (Change, Renew, Swap or Terminate), a new transaction and order record is created inside Asset Transaction History related list.

The following image illustrates the actions and the associated details for those actions.



Asset Transaction History (From) — New Asset Transaction History — Asset Transaction History (From) Help

Action	Txn Id	Action	Effective Start Date	Order Line Item	Order	Price List Item	Transaction Date
Edit | Del	ATH-00001917	New	2/24/2016	OI-0000002498	O-00001355	PI-0000048680	2/24/2016
Edit | Del	ATH-00001918	Renew	2/24/2017	OI-0000002499	O-00001356	PI-0000048680	2/24/2016

Click on the transaction ID to view the details. In the following image, you can see the Asset Transaction History detail.

Asset Transaction History Detail — Edit | Delete | Clone

Txn Id	ATH-00001923	Owner	Apttus Technical Publications
Action	Renew	Asset Line Item	Online Education
Transaction Date	2/24/2016	Changed To Asset Line Item	
Effective Start Date	2/24/2017	Price List Item	PI-0000048682
		Order	O-00001360
		Order Line Item	OI-0000002504

The **Asset Line Item History** denotes the list of transactions made on the same Asset Line Item.

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Integrating Assets with Contracts

Apttus CPQ now provides the ability to synchronize the changes in Assets with the changes in a Contract. The changes you make inside a Contract (such as a change in Contract End Date) will be reflected in the Assets contained in that Contract. Similarly, when you perform actions on your purchased Assets (such as changing the Quantity of an Asset), these changes will be reflected in the Contract.

For Contracts, the actions include: **Renew** and **Cancel**. For Assets, the actions include: **Change**, **Swap**, **Terminate**, and **Renew**.

Consider an example of a learning and publications company, selling products such as Java Learning, Python Learning, and CSS Learning.

Following are the use cases when the synchronization between a contract and assets is important:

For assets,

- When you *change* the duration, price, billing parameters, or any such attributes of an asset, the corresponding changes must be reflected in the Contract.
- When you *cancel* multiple assets, the Asset or Order Line Items for these assets must be removed from the contract. Similarly, when you add a new asset, the contract must contain the details for the new asset. This could be the result of swapping an existing asset with another product. Example, purchasing CSS Learning product if Python Learning is discontinued by the company.
- When you *renew* the terms and end date of an asset, the renewal dates of a contract must be synchronized.
- When you *terminate* an existing asset and require the refunded amount back before the expiration date of the contract, the contract must reflect the new termination date.

For Contracts,

- When you *cancel* or *terminate* a contract before the expiration date, the corresponding assets must also be cancelled.
- When you renew a contract, all its corresponding assets must also be renewed.

There are basically 3 process flows you must consider:

1. A contract contains Agreement Line Items, Asset Line Items or Order Line Items. These Line Items are created when a contract is finalized. In this case, only Contract and no Quote /Proposal is involved.

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2. A contract contains Agreement Line Items, Asset Line Items or Order Line Items. These Line Items are created from the Proposal Line Items when a Quote is accepted. In this case, both, Contract and Quote/Proposal are involved.
3. Normal CSR Flow: A Quote/Proposal document contains Asset Line Items or Order Line Items and these are created when a Quote/Proposal is accepted.

With the normal CSR flow supported in the previous release, the new release involves an integration of Assets with Contracts (number 1 and 2).

Integrating Assets with Contracts (with a Quote/Proposal)

To integrate Assets with Contracts (with a Quote/Proposal)

Ensure that you have set the custom setting, **Auto Create Order** to True under **Setup > Develop > Custom Settings > Comply System Properties.**

1. Create a new Quote/Proposal record by clicking **All Tabs (+) > Proposals > New**.
2. Enter requisite details, such as Proposal Name, Proposal Start Date, and Proposal End Date.
3. Associate an Account, an Opportunity, and a Price List to your record.
4. Click **Configure Products** to navigate to the Catalog and configure the required products with options and attributes.
5. Once your configuration is finalized, click **Finalize** to navigate back to the Quote/Proposal detail page.
6. Click **Accept** to accept the finalized line items in your Quote/Proposal.
   Once you have accepted the Quote/Proposal, **Create Agreement with Line Items** is active.
7. Click **Create Agreement with Line Items** to copy all the Proposal Line Items to the Agreement Line Items.
8. After the negotiations are complete with your customer, click **Activate** to bring the contract in execution.
   Note that the Agreement Line Items related list now contains the finalized, activated line item records.
9. Hit refresh to see that the **Order**, **Order Line Items** and **Asset Line Items** related lists now contain records.
10. Go to your Order record and enter the **Ready for Activation Date** and click **Save**.

This will change the **Status** of all your **Order Line Items** and **Asset Line Items** to *Activated.*

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Post activation, you may perform actions like **Amend**, **Renew**, and **Terminate**. For Amend and Renew, a new agreement record is created. The **Related Agreements** related list contains the records which indicate how these agreement records are related to each other.

For the amended or renewed agreement, notice that the status of the Asset Line Items is also changed. Click **Configure Products** on the new agreement to perform the ABO actions on the assets.

Integrating Assets with Contracts (without a Quote/Proposal)

To integrate Assets with Contracts (without a Quote/Proposal)

Ensure that you have set the custom setting, **Auto Create Order** to True under **Setup > Develop > Custom Settings > Comply System Properties.**

1. Create a new Agreement record by clicking **All Tabs (+) > Agreements > New**.
2. Enter requisite details, such as Agreement Name, Agreement Start Date, and Agreement End Date.
3. Associate an Account and a Price List to your agreement record.
4. Click **Configure Products** to navigate to the Catalog and configure the required products with options and attributes.
5. Once your configuration is finalized, click **Finalize** to navigate to your agreement record.
6. Now that your line items finalized, click **Generate** to generate an agreement document.
7. After the negotiations with your customer is complete, click **Activate** to put the agreement in effect.
   Note that the Agreement Line Items related list now contains the finalized, activated line item records.
8. Hit refresh to see that the **Order**, **Order Line Items** and **Asset Line Items** related lists now contain records.
9. Go to your Order record and enter the **Ready for Activation Date** and click **Save**.

This will change the **Status** of all your **Order Line Items** and **Asset Line Items** to *Activated.*

Post activation, you may perform actions like **Amend**, **Renew**, and **Terminate**. For Amend and Renew, a new agreement record is created. The **Related Agreements** related list contains the records which indicate how these agreement records are related to each other.

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For the amended or renewed agreement, notice that the status of the Asset Line Items is also changed. Click **Configure Products** on the new agreement to perform the ABO actions on the assets.

Billing for Assets

- Impact of Asset actions on Billing Schedules
- Billing Schedules for Renewed Assets
- Billing Schedules for Canceled Assets
- Usage Schedules for Canceled Assets
- Changing Billing Schedules when you Decrease the Net Price of an Asset
- Changing Billing Schedules when you change the Billing Frequency of an Asset
- Changing Billing Schedules when you Extend the End Date of an Asset
- Changing Billing Schedules when you Increase the Net Price of an Asset
- Changing Billing Schedules when you reduce the End Date of an Asset

Impact of Asset actions on Billing Schedules

If you use Apttus Billing Management, you must consider the impact of each asset action, **Renew**, **Change**, **Swap** or **Terminate** has on the Billing and Invoicing of the purchased products. While the impact of asset actions on Billing Schedules are detailed in this guide, you must also consider the following definitions before you make any changes to an asset.

Field	Definition
Period Start Date	The date you want to start billing your customer for this purchase.
Period End Date	The date you want to stop billing your customer for this purchase.
	The rule you defined to either **Bill in Advance** or **Bill in Arrears.**

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Field	Definition
Billing Rule	
Billing Plan	• **Periodic** - to bill your customer on fixed billing dates that represent custom billing periods that may or may not have a regular frequency. • **Milestone** - to distribute the total amount to be billed over multiple billing dates. As each milestone is successfully reached, you can bill your customer either a percentage of the entire cost or a pre-defined amount.
Billing Day of the Month	If you have configured **Billing Preference** with Account Billing Day of Month, select the day of the month when you want to generate the bill for this account.
Billing Cycle Start	Select one of the following options. • **Billing Day of the Month** - to start the billing cycle on the Billing day of the month • **Ready for Billing Date** - to start the billing cycle when the status of the proposal changes to Ready for Invoicing date • **Period Start Date** - Apttus Billing Management inherits this value from Apttus CPQ • **Order Date** - Apttus Billing Management inherits this value from Apttus CPQ • **Account Billing Day of the Month** - select this option if you want to define the Billing Preference to use the Billing Day of the Month that you have defined on the Accounts page

Scroll down to the Billing Schedule section on the Asset Line Item detail page to view the Billing and Usage schedules for that asset.

Billing Schedules for Renewed Assets

To define the **Renewal Date** on the Confirm Renewal page, select from one of the following options.

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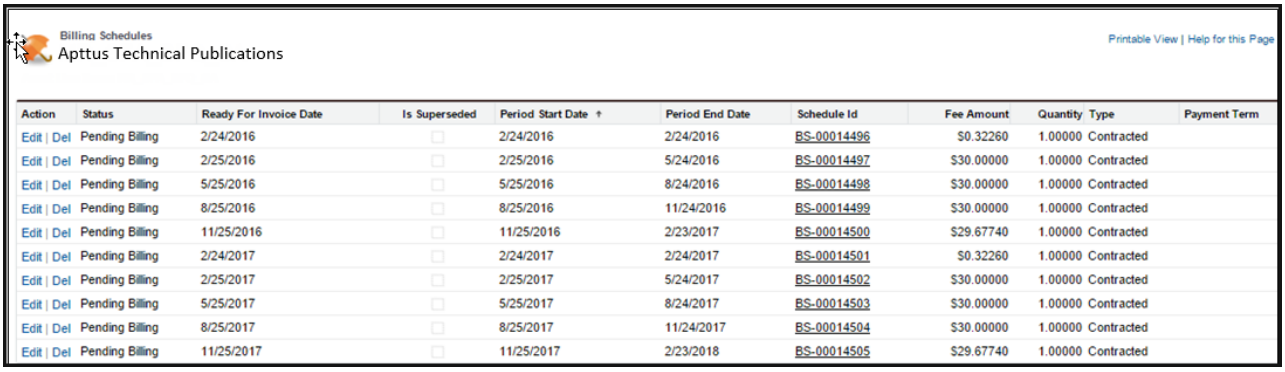
- **Contract End Date** - if you want to renew the asset on the date the contract expires.
- **Asset End Date** - if you want to renew the asset on the date the asset expires.
- **Farthest End Date** - if you want to choose the farthest end date out of all the selected Asset Line Items and apply this date to all the Asset Line Items.
- **Renewal Date** - use the calendar to define a custom date to renew the asset.

The date you enter here determines the billing period for the Renewed asset. The new Billing Schedules for a renewed asset are in the Pending Billing state by default.


Billing Schedules
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Action	Status	Ready For Invoice Date	Is Superseded	Period Start Date	Period End Date	Schedule Id	Fee Amount	Quantity	Type	Payment Term
Edit | Del	Pending Billing	2/24/2016		2/24/2016	2/24/2016	BS-00014496	$0.32260	1.00000	Contracted	
Edit | Del	Pending Billing	2/25/2016		2/25/2016	5/24/2016	BS-00014497	$30.00000	1.00000	Contracted	
Edit | Del	Pending Billing	5/25/2016		5/25/2016	8/24/2016	BS-00014498	$30.00000	1.00000	Contracted	
Edit | Del	Pending Billing	8/25/2016		8/25/2016	11/24/2016	BS-00014499	$30.00000	1.00000	Contracted	
Edit | Del	Pending Billing	11/25/2016		11/25/2016	2/23/2017	BS-00014500	$29.67740	1.00000	Contracted	
Edit | Del	Pending Billing	2/24/2017		2/24/2017	2/24/2017	BS-00014501	$0.32260	1.00000	Contracted	
Edit | Del	Pending Billing	2/25/2017		2/25/2017	5/24/2017	BS-00014502	$30.00000	1.00000	Contracted	
Edit | Del	Pending Billing	5/25/2017		5/25/2017	8/24/2017	BS-00014503	$30.00000	1.00000	Contracted	
Edit | Del	Pending Billing	8/25/2017		8/25/2017	11/24/2017	BS-00014504	$30.00000	1.00000	Contracted	
Edit | Del	Pending Billing	11/25/2017		11/25/2017	2/23/2018	BS-00014505	$29.67740	1.00000	Contracted	

Each renewed asset has such Billing schedules that Apttus CPQ creates automatically when the asset is activated.

Billing Schedules for Cancelled Assets

When you cancel an asset, the cancellation is effective only after one day's time.

Example 1.

You are a customer service representative for a telecommunications company and you cancel a customer's data subscription plan mid-cycle when the status of each Billing Schedule is **Pending Billing**.

Before you cancel the subscription, you see the following Billing Schedules.

Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Pending Billing	100.00	
BS2	2/1/2015	2/28/2015	Pending Billing	100.00	

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Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS3	3/1/2015	3/31/2015	Pending Billing	100.00	
BS4	4/1/2015	4/30/2015	Pending Billing	100.00	

After you cancel the subscription, you see that status of schedules changes.

Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Pending Billing	100.00	
BS2	2/1/2015	2/28/2015	**Superseded**	100.00	**Yes**
BS5	**2/1/2015**	**2/14/2015**	**Pending Billing**	**50.00**	
BS6	**2/15/2015**	**2/28/2015**	**Cancelled**	**50.00**	
BS3	3/1/2015	3/31/2015	**Cancelled**	100.00	
BS4	4/1/2015	4/30/2015	**Cancelled**	100.00	

In the above example, because the you cancelled the subscription mid-cycle, the original Billing Schedule is superseded and replaced by the following new Billing Schedules.

- BS1 is for the partial period that is still active and has not been billed.
- BS2 is for the partial period that has been cancelled.

Also, because the Billing Schedules for March and April are unbilled their status is set to *Cancelled.*

Example 2.

Consider another example where you want to cancel a customer's data subscription plan mid-cycle when the status of some Billing Schedules is **Pending Billing** and others is **Invoiced**.

Before you cancel the subscription, you see the following Billing Schedules.

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Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	100.00	
BS2	2/1/2015	2/28/2015	Invoiced	100.00	
BS3	3/1/2015	3/31/2015	Invoiced	100.00	
BS4	4/1/2015	4/30/2015	Pending Invoiced	100.00	
BS5	5/1/2015	5/31/2015	Pending Billing	100.00	

After you cancel the subscription, you see that status of schedules changes.

Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	100.00	
BS2	2/1/2015	2/28/2015	Invoiced	100.00	**Yes**
BS6	**2/15/2015**	**2/28/2015**	**Cancelled**	**50.00**	
BS7	**2/15/2015**	**2/28/2015**	**Pending Billing**	**-50.00**	
BS3	3/1/2015	3/31/2015	Invoiced	100.00	**Yes**
BS8	**3/1/2015**	**3/31/2015**	**Pending Billing**	**-100.00**	
BS4	4/1/2015	4/30/2015	**Cancelled**	100.00	
BS5	5/1/2015	5/31/2015	**Cancelled**	100.00	

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In the second example, because you cancelled the subscription mid-cycle, the Billing Schedule for February is invoiced and is augmented with two new Billing Schedules.

- BS1 is for the partial period that was cancelled and is used to record that portion of the invoiced amount that was cancelled.
- BS2 is also for the partial period that was cancelled and it is used to generate an Invoice Line Item in order to reflect the credit for the portion of the invoiced amount that was cancelled.

Because the entire period for March is already *invoiced* it augments a single Billing Schedule that is used to generate an Invoice Line Item that then reflects the credit for the invoiced amount was cancelled. The Billing Schedules for April and March are *unbilled* their status is changed to *Cancelled*.

Usage Schedules for Cancelled Assets

Example 1.

You are a customer service representative for a telecommunications company and you cancel a customer's usage based subscription plan mid-cycle when the status of each Usage Schedule is **Pending Billing**.

Before you cancel the subscription, the asset line item has the following Billing Schedules.

Billing Schedule	Period Start	Period End	Status	Usage Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	88.00	
BS2	2/1/2015	2/28/2015	Pending Billing	72.00	
BS3	3/1/2015	3/31/2015	Pending Billing	0.00	
BS4	4/1/2015	4/30/2015	Pending Billing	0.00	

Before you cancel the subscription, the asset line item has the following Usage Schedules.

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Usage Schedule	Period Start	Period End	Status	Billing Schedule ID	Quantity	Superseded
US1	1/1/2015	1/31/2015	Pending Billing	BS1	30	
US2	2/1/2015	2/28/2015	Pending Billing	BS2	26	
US3	3/1/2015	3/31/2015	Pending Billing	BS3	0	
US4	4/1/2015	4/30/2015	Pending Billing	BS4	0	

After you cancel the subscription, the status of Billing Schedules change.

Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	100.00	
BS2	2/1/2015	2/28/2015	**Superseded**	72.00	**Yes**
BS5	**2/1/2015**	**2/21/2015**	**Pending Billing**	**52.50**	
BS6	**2/22/2015**	**2/28/2015**	**Cancelled**	**19.50**	
BS3	3/1/2015	3/31/2015	**Cancelled**	0.00	
BS4	4/1/2015	4/30/2015	**Cancelled**	0.00	

After you cancel the subscription, the status of Usage Schedules change.

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Usage Schedule	Period Start	Period End	Status	Billing Schedule ID	Quantity	Superseded
US1	1/1/2015	1/31/2015	Pending Billing	BS1	30	
US2	2/1/2015	2/28/2015	**Superseded**	BS2	26	**Yes**
US5	**2/1/2015**	**2/21/2015**	**Pending Billing**	**BS5**	**17**	
US6	**2/22/2015**	**2/28/2015**	**Cancelled**	**BS6**	**9**	
US3	3/1/2015	3/31/2015	**Cancelled**	BS3	0	
US4	4/1/2015	4/30/2015	**Cancelled**	BS4	0	

In the above example, because you cancelled the subscription mid-cycle, and Usage Schedule for the February is unbilled, the status is marked as *Superseded* and augmented be with the following Usage Schedules.

- BS1 is for the partial period that is still active and has not been *billed*. It reflects the aggregate amount of the *rated* Usage Inputs that have a date greater than or equal to 2/1 and less than or equal 2/21.
- US1 is for the partial period that is still active and has not been *billed*. It reflects the aggregate quantity of the *rated* Usage Inputs that have a date greater than or equal to 2/1 and less than or equal 2/21.
- BS2 is for the partial period that has been cancelled. It reflects the aggregate amount of the *rated* Usage Inputs that have a date greater than or equal to 2/22 and less than or equal 2 /28.
- US2 is for the partial period that you cancelled. It reflects the aggregate quantity of the *rated* Usage Inputs that have a date greater than or equal to 2/22 and less than or equal 2/28.

Note

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Every usage based asset that you terminate or change, also has Billing Schedules associated with that asset. The Usage Schedules are updated in a manner similar to the Billing Schedules.

Example 2.

Consider another example where you want to cancel a customer's subscription plan mid-cycle when the status of some Usage Schedules is **Pending Billing** and others is **Invoiced**.

Before you cancel the subscription, the asset line item has the following Billing Schedules.

Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	88.00	
BS2	2/1/2015	2/28/2015	Invoiced	72.00	
BS3	3/1/2015	3/31/2015	Invoiced	78.00	
BS4	4/1/2015	4/30/2015	Pending Billing	66.00	

Before you cancel the subscription, the asset line item has the following Usage Schedules.

Usage Schedule	Period Start	Period End	Status	Billing Schedule ID	Quantity	Superseded
US1	1/1/2015	1/31 /2015	Pending Billing	BS1	30	
US2	2/1/2015	2/28 /2015	Pending Billing	BS2	26	
US3	3/1/2015	3/31 /2015	Pending Billing	BS3	31	
US4	4/1/2015			BS4	24	

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Usage Schedule	Period Start	Period End	Status	Billing Schedule ID	Quantity	Superseded
		4/30 /2015	Pending Billing			

After you cancel the subscription, you see that status of Billing Schedules change.

Billing Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	100.00	
BS2	2/1/2015	2/28/2015	Invoiced	72.00	**Yes**
BS5	**2/1/2015**	**2/28/2015**	**Pending Billing**	**-72.00**	
BS6	**2/1/2015**	**2/22/2015**	**Pending Billing**	**52.50**	
BS7	**2/22/2015**	**2/28/2015**	**Cancelled**	**19.50**	
BS3	3/1/2015	3/31/2015	Invoiced	78.00	**Yes**
BS8	**3/1/2015**	**3/31/2015**	**Pending Billing**	**-78.00**	
BS4	4/1/2015	4/30/2015	**Cancelled**	66.00	

After you cancel the subscription, you see that status of Usage Schedules change.

Usage Schedule	Period Start	Period End	Status	Billing Schedule ID	Quantity	Superseded
US1	1/1/2015	1/31 /2015	Pending Billing	BS1	30	

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Usage Schedule	Period Start	Period End	Status	Billing Schedule ID	Quantity	Superseded
US2	2/1/2015	2/28 /2015	**Invoiced**	BS2	26	**Yes**
US5	**2/1/2015**	**2/21/2015**	**Pending Billing**	**BS6**	**17**	
US6	**2/22/2015**	**2/28/2015**	**Cancelled**	**BS7**	**9**	
US3	3/1/2015	3/31 /2015	**Invoiced**	BS3	31	**Yes**
US4	4/1/2015	4/30 /2015	**Cancelled**	BS4	24	

In the second example, because you cancelled the subscription mid-cycle, the Billing Schedule for February is invoiced and is augmented with two new Billing Schedules.

- BS1 is a credit for the amount that was *invoiced*.
- BS2 is for the partial period that was not cancelled and is used to charge for the portion of the invoiced amount was billed. It reflects the aggregate amount of the *rated* Usage Inputs that have a date greater than or equal to 2/1 and less than or equal 2/21.
- US1 is for the partial period that was not cancelled and is used to record (audit) that portion of the quantity amount was billed. It reflects the aggregate quantity of the *rated* Usage Inputs that have a date greater than or equal to 2/1 and less than or equal 2/21.
- BS3 is for the partial period that was cancelled and the amount the Account will not be charged for. It reflects the aggregate amount of the *rated* Usage Inputs that have a date greater than or equal to 2/22 and less than or equal 2/28.
- US2 is also for the partial period that has been cancelled. It reflects the aggregate quantity of the *rated* Usage Inputs that have a date greater than or equal to 2/22 and less than or equal 2/28.

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Because the entire period for March is already *invoiced* it augments a single Billing Schedule that is used to generate an Invoice Line Item that then reflects the credit for the invoiced amount was cancelled. The Billing Schedules for April and March are *unbilled* their status is changed to *Cancelled*.

Changing Billing Schedules when you Decrease the Net Price of an Asset

You are a customer service representative for a software company and you decrease the Net Price of the customer's software subscription plan mid-cycle when the status of each Billing Schedule is **Pending Billing**.

Before you decrease the Net Price of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Pending Invoiced	100.00	
BS2	5/1/2015	5/31/2015	Pending Invoiced	100.00	
BS3	6/1/2015	6/30/2015	Pending Billing	100.00	

After you decrease the Net Price of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	**Superseded**	100.00	**Yes**
BS4	**4/1/2015**	**4/15/2015**	**Pending Billing**	**50.00**	
BS5	**4/16/2015**	**4/30/2015**	**Pending Billing**	**25.00**	
BS2	5/1/2015	5/31/2015	**Superseded**	100.00	**Yes**
BS6	**5/1/2015**	**5/31/2015**	**Pending Billing**	**50.00**	

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS3	6/1/2015	6/30/2015	**Superseded**	100.00	**Yes**
BS7	**6/1/2015**	**6/30/2015**	**Pending Billing**	**50.00**	

Because the amendment is *mid-cycle* and the April Billing Schedule is unbilled it will be *superseded* and *augmented* with the following new Billing Schedules.

- BS1 reflects the amount (at the old rate) to charge for the partial period before the amendment date.
- BS2 reflects the decreased amount for the partial period that was amended.

Also, the Billing Schedules for May and June are *unbilled* and are *superseded* and replaced by Billing Schedules that reflect the decreased amount.

Example 2

Consider another example where for a software company and you decrease the Net Price of the customer's software subscription plan mid-cycle when the status of some Billing Schedules is **Pending Billing** and others is **Invoiced** .

Before you decrease the Net Price of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	100.00	
BS2	5/1/2015	5/31/2015	Invoiced	100.00	
BS3	6/1/2015	6/30/2015	Pending Billing	100.00	

After you decrease the Net Price of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	100.00	**Yes**

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BS4	**4/16/2015**	**4/30/2015**	**Pending Billing**	**-50.00**	
BS5	**4/16/2015**	**4/30/2015**	**Pending Billing**	**25.00**	
BS2	5/1/2015	5/31/2015	Invoiced	100.00	**Yes**
BS6	**5/1/2015**	**5/31/2015**	**Pending Billing**	**-50.00**	
BS3	6/1/2015	6/30/2015	**Superseded**	100.00	**Yes**
BS7	**6/1/2015**	**6/30/2015**	**Pending Billing**	**50.00**	

Because the amendment is *mid-cycle* and the April Billing Schedule is already invoiced it remains as invoiced and is *augmented* with the following new Billing Schedules.

- BS1 reflects the amount (at the old rate) that was invoiced for the partial period at/after the amendment date and will appear as a *credit* when an Invoice is generated.
- BS2 reflects the decreased amount for the partial period that was amended and will appear as a *charge* when an Invoice is generated.

Also, the Billing Schedule for May has been invoiced it will remain as invoiced and will be augmented with one new Billing Schedule. This new Billing Schedule contains the new amount to charge for and appears on the next Invoice generated for that Asset. The Billing Schedule for June is then unbilled (in draft state) it is superseded and replaced by a Billing Schedule that reflects the decreased amount.

Changing Billing Schedules when you change the Billing Frequency of an Asset

You are a customer service representative for a software company and you must change the Billing frequency from Quarterly to Monthly for a customer's software subscription plan, mid-cycle when the status of each Billing Schedule is **Pending Billing**.

Before you change the Billing frequency of the subscription from Quarterly to Monthly, you see the following Billing Schedules.

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	7/1/2015	9/30/2015	Invoiced	90.00	
BS2	10/1/2015	12/31/2015	Invoiced	90.00	
BS3	1/1/2016	3/31/2016	Pending Billing	90.00	

After you extend the End Date of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	7/1/2015	9/30/2015	Invoiced	90.00	**Yes**
BS4	**8/1/2015**	**9/30/2015**	**Pending Billing**	**-60.00**	
BS5	**8/1/2015**	**8/31/2015**	**Pending Billing**	**20.00**	
BS6	**9/1/2015**	**9/30/2015**	**Pending Billing**	**20.00**	
BS2	10/1/2015	12/31/2015	Invoiced	90.00	**Yes**
BS7	**10/1/2015**	**12/31/2015**	**Pending Billing**	**-90.00**	
BS8	**10/1/2015**	**10/31/2015**	**Pending Billing**	**20.00**	
BS9	**11/1/2015**	**11/30/2015**	**Pending Billing**	**20.00**	
BS10	**12/1/2015**	**12/31/2015**	**Pending Billing**	**20.00**	
BS3	1/1/2016	3/30/2016	**Superseded**	90.00	**Yes**
BS11	**1/1/2016**	**1/31/2016**	**Pending Billing**	**20.00**	

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS12	**2/1/2016**	**2/29/2016**	**Pending Billing**	**20.00**	
BS13	**3/1/2016**	**3/31/2016**	**Pending Billing**	**20.00**	
BS14	**4/1/2016**	**4/30/2016**	**Pending Billing**	**20.00**	

The new *Term* is now 8/1/2015 – 4/30/2016 (9 months) and the new Net Price is 180.00, the Fee amount is 20.00 per month. When you transition from a less frequent Billing Frequency (like quarterly) to more a frequent Billing Frequency (like monthly), a *credit* Billing Schedule is created for each *whole period* Billing Schedule that is invoiced.

Because the billing frequency change is mid-cycle and the July-September Billing Schedule has been invoiced it will remain as invoiced and will be *augmented* with the following new Billing Schedules.

- BS4 reflects the amount for the partial period that is being amended (at the original billing frequency and rate) and will appear as a *credit* when an Invoice is generated.
- BS5 reflects the amount to charge for the first month within the amended partial period of the quarter.
- BS6 reflects the amount to charge for the second month within the amended partial period of the quarter.

Also, the October-December Billing Schedule has been invoiced it will remain as invoiced and will be *augmented* with the following new Billing Schedules.

- BS7 is a credit for the amount that was invoiced.
- BS8 reflects the amount to charge for the first month within the 2nd quarter.
- BS9 reflects the amount to charge for the second month within the 2nd quarter.
- BS10 reflects the amount to charge for the third month within the 2nd quarter.

The January-March Billing Schedule is unbilled and is marked as *Superseded* and augmented with the following new Billing Schedules.

- BS11 reflects the amount to charge for the first month within the 3rd quarter.
- BS12 reflects the amount to charge for the second month within the 3rd quarter.

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- BS13 reflects the amount to charge for the third month within the 3rd quarter.

The End Date of the Asset Line Item is extended by 1 month to 4/30/2016 an additional Billing Schedule, BS14 is created to accommodate the extension.

Example 2

Consider another example where you must change the Billing frequency from Monthly to Quarterly, for a customer's software subscription plan, mid-cycle when the status of some Billing Schedules is **Pending Billing** and others is **Invoiced**.

Before you change the Billing frequency of the subscription from Monthly to Quarterly, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	3/1/2015	3/31/2015	Invoiced	100.00	
BS2	4/1/2015	4/30/2015	Invoiced	100.00	
BS3	5/1/2015	5/31/2015	Invoiced	100.00	
BS4	6/1/2015	6/30/2015	Invoiced	100.00	
BS5	7/1/2015	7/31/2015	Invoiced	100.00	
BS6	8/1/2015	8/31/2015	Pending Invoiced	100.00	

After you extend the End Date of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	3/1/2015	3/31/2015	Invoiced	100.00	
BS2	4/1/2015	4/30/2015	Invoiced	100.00	**Yes**
BS7	**4/16/2015**	**4/30/2015**	**Pending Billing**	**-50.00**	

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS8	**4/16/2015**	**5/31/2015**	**Pending Billing**	**50.00**	
BS3	5/1/2015	5/31/2015	Invoiced	100.00	**Yes**
BS4	6/1/2015	6/30/2015	Invoiced	100.00	**Yes**
BS9	**6/1/2015**	**8/31/2015**	**Pending Billing**	**100.00**	
BS5	7/1/2015	7/31/2015	Invoiced	100.00	**Yes**
BS6	8/1/2015	8/31/2015	**Superseded**	100.00	**Yes**

The new Term is now 4/16 – 8/31 (4 ½ months) and the new Net Price is 450.00, the Fee amount is 300.00 every quarter. The amendment was performed on 4/16 with the Billing Cycle Start defined as the Period Start Date and the Calendar Cycle Start is June, the 1st period is from 4/16 to 5/31. After this period the quarters is aligned with 6/1 so the next period is from 6/1 to 8/1.

Because the billing frequency change is mid-cycle and the April Billing Schedule has been invoiced it will remain as invoiced and will be augmented with one new Billing Schedule. The new Billing Schedule reflects the amount for the partial period that is being amended (at the original billing frequency and rate) and will appear as a credit when an Invoice is generated.

Because the billing frequency change goes into effect 4/16 and the 16th does not align with the Start Period Date (3/1) a partial period will created for the 1st new quarter. The Billing Schedule for May has already been invoiced, remains as invoiced, and is superseded by BS8. BS9 is created with a quarterly billing frequency that is from 6/1/2015 - 8/31/2015. It supersedes the 3 Billing Schedules for the months of June, July, and August. The Fee Amount is 300.00 but, because you Invoiced the schedules for June and July, the Fee amount is reduced to 100.00.

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Changing Billing Schedules when you Extend the End Date of an Asset

Example 1.

You are a customer service representative for a software company and you extend the End Date of a customer's software subscription plan mid-cycle when the status of each Billing Schedule is **Pending Billing**.

Before you extend the End Date of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	200.00	
BS2	5/1/2015	5/31/2015	Invoiced	200.00	
BS3	6/1/2015	6/30/2015	Pending Invoiced	200.00	

After you extend the End Date of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	200.00	**Yes**
BS4	**4/16/2015**	**4/30/2015**	**Pending Billing**	**-100.00**	
BS5	**4/16/2015**	**4/30/2015**	**Pending Billing**	**50.00**	
BS2	5/1/2015	5/31/2015	Invoiced	200.00	**Yes**
BS6	**5/1/2015**	**5/31/2015**	**Pending Billing**	**-100.00**	
BS3	6/1/2015	6/30/2015	**Superseded**	200.00	**Yes**
BS7	**6/1/2015**	**6/30/2015**	**Pending Billing**	**100.00**	

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS8	**7/1/2015**	**7/31/2015**	**Pending Billing**	**100.00**	
BS9	**8/1/2015**	**8/31/2015**	**Pending Billing**	**100.00**	
BS10	**9/1/2015**	**9/15/2015**	**Pending Billing**	**50.00**	

Because the amendment is *mid-cycle* and the April Billing Schedule has been invoiced it will remain as invoiced and *augmented* with two new Billing Schedules.

- BS1 reflects the overpaid amount for the partial period that was amended and will appear as a *credit* when an Invoice is generated.
- BS2 reflects the new amount for the partial period that was amended and will appear as a *debit* when an Invoice is generated.

Also, the Billing Schedule for May has been invoiced it will be augmented with one new Billing Schedule. This new Billing Schedule contains a credit for the overpaid amount that was invoiced and will appear on the next Invoice generated for the corresponding Asset. The Billing Schedule for June is unbilled it will be superseded and replaced by a Billing Schedule that reflects the new amount. The **End Date** was extended by 2.5 months and 3 new Billing Schedules are created with the appropriate *fee amount*. The last Schedule created is only for half a month.

Example 2

Consider another example where you extend the End Date of the customer's software subscription plan mid-cycle when the status of some Billing Schedules is **Pending Billing** and others is **Invoiced**.

Before you extend the End Date of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	100.00	
BS2	5/1/2015	5/31/2015	Invoiced	100.00	

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS3	6/1/2015	6/30/2015	Pending Billing	100.00	

After you extend the End Date of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	200.00	
BS2	5/1/2015	5/31/2015	Invoiced	200.00	**Yes**
BS4	**5/1/2015**	**5/31/2015**	**Pending Billing**	**-100.00**	
BS3	6/1/2015	6/15/2015	**Superseded**	100.00	**Yes**
BS5	**6/1/2015**	**6/30/2015**	**Pending Invoiced**	**100.00**	
BS6	**7/1/2015**	**7/31/2015**	**Pending Invoiced**	**100.00**	

Note

The End Date of the Asset Line Item was extended by 1.5 months and Net Price was set to 300.00 for the new Term (5/1/2015 – 7/31/2015). This reduces the Fee from $200 per month to $100.00 per month.

Because the amendment is at the period start and the May Billing Schedule has been invoiced it will remain as invoiced and will be augmented with one new Billing Schedule. The new Billing Schedule reflects the overpaid amount for the whole period that was amended and will appear as a credit when an Invoice is generated. The Billing Schedule for June is unbilled it will be superseded and replaced by a Billing Schedule that reflects the new amount.

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Because the original Schedule for June was for a partial period and the End Date of the Asset Line Item is extended by 1.5 months, the replacement Billing Schedule period is extended to a full period. Extending the End date by a period of 1.5 months results in the following changes.
The partial period for June is extended to a full period and the fee amount is updated accordingly.
A new Billing Schedule is created for July with the appropriate fee amount.

Changing Billing Schedules when you Increase the Net Price of an Asset

Example 1.

You are a customer service representative for a software company and you increase the Net Price of the customer's software subscription plan mid-cycle when the status of each Billing Schedule is **Pending Billing**.

Before you increase the Net Price of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	3/1/2015	3/31/2015	Pending Invoiced	100.00	
BS2	4/1/2015	4/30/2015	Pending Invoiced	100.00	
BS3	5/1/2015	5/31/2015	Pending Billing	100.00	
BS4	6/1/2015	6/30/2015	Pending Billing	100.00	

After you increase the Net Price of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	3/1/2015	3/31/2015	Pending Invoiced	100.00	
BS2	4/1/2015	4/30/2015	**Superseded**	100.00	**Yes**
BS5	**4/1/2015**	**4/15/2015**	**Pending Billing**	**50.00**	
BS6	**4/16/2015**	**4/30/2015**	**Pending Billing**	**100.00**	

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BS3	5/1/2015	5/31/2015	**Superseded**	100.00	**Yes**
BS7	**5/1/2015**	**5/31/2015**	**Pending Billing**	**200.00**	
BS4	6/1/2015	6/30/2015	**Superseded**	100.00	**Yes**
BS8	**6/1/2015**	**6/30/2015**	**Pending Billing**	**200.00**	

Because the amendment is *mid-cycle* and the April Billing Schedule is unbilled it will be *superseded* and *augmented* with the following new Billing Schedules.

- BS1 reflects the amount (at the old rate) to charge for the partial period before the amendment date.
- BS2 reflects the increased amount for the partial period that was amended.

Also, the Billing Schedules for May and June are *unbilled* and are *superseded* and replaced by Billing Schedules that reflect the increased amount.

Example 2

Consider another example where for a software company and you increase the Net Price of the customer's software subscription plan mid-cycle when the status of some Billing Schedules is **Pending Billing** and others is **Invoiced**.

Before you increase the Net Price of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	100.00	
BS2	5/1/2015	5/31/2015	Invoiced	100.00	
BS3	6/1/2015	6/30/2015	Pending Invoiced	100.00	

After you increase the Net Price of the subscription, the number of and the status of each Billing Schedule changes.

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	100.00	**Yes**
BS4	**4/16/2015**	**4/30/2015**	**Pending Billing**	**-50.00**	
BS5	**4/16/2015**	**4/30/2015**	**Pending Billing**	**100.00**	
BS2	5/1/2015	5/31/2015	Invoiced	100.00	**Yes**
BS6	**5/1/2015**	**5/31/2015**	**Pending Billing**	**100.00**	
BS3	6/1/2015	6/30/2015	**Superseded**	100.00	**Yes**
BS7	**6/1/2015**	**6/30/2015**	**Pending Billing**	**200.00**	

Because the amendment is *mid-cycle* and the April Billing Schedule is already invoiced it remains as invoiced and is *augmented* with the following new Billing Schedules.

- BS1 reflects the amount (at the old rate) that was invoiced for the partial period at/after the amendment date and will appear as a *credit* when an Invoice is generated.
- BS2 reflects the increased amount for the partial period that was amended and will appear as a *charge* when an Invoice is generated.

Also, the Billing Schedule for May has been invoiced it will be remain as invoiced and will be augmented with one new Billing Schedule. This new Billing Schedule contains the new amount to charge for and appears on the next Invoice generated for that Asset. The Billing Schedule for June is then unbilled (in draft state) it is superseded and replaced by a Billing Schedule that reflects the increased amount.

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Changing Billing Schedules when you reduce the End Date of an Asset

Example 1

You are a customer service representative for a software company and you shorten the End Date of a customer's software subscription plan mid-cycle when the status of each Billing Schedule is **Pending Billing**.

Before you shorten the End Date of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Pending Invoiced	100.00	
BS2	5/1/2015	5/31/2015	Pending Invoiced	100.00	
BS3	6/1/2015	6/30/2015	Pending Invoiced	100.00	
BS4	7/1/2015	7/31/2015	Pending Billing	100.00	
BS5	8/1/2015	8/31/2015	Pending Billing	100.00	

After you shorten the End Date of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	**Superseded**	100.00	**Yes**
BS6	**4/1/2015**	**4/15/2015**	**Pending Billing**	**50.00**	
BS7	**4/16/2015**	**4/30/2015**	**Pending Billing**	**112.50**	
BS2	5/1/2015	5/31/2015	**Superseded**	100.00	**Yes**
BS8	**5/1/2015**	**5/31/2015**	**Pending Billing**	**225.00**	

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BS3	6/1/2015	6/30/2015	**Superseded**	100.00	**Yes**
BS9	**6/1/2015**	**6/15/2015**	**Pending Billing**	**112.50**	
BS10	**6/15/2015**	**6/30/2015**	**Cancelled**	**50.00**	
BS4	7/1/2015	7/31/2015	**Cancelled**	100.00	
BS5	8/1/2015	8/31/2015	**Cancelled**	100.00	

Because the **End Date** of the Asset Line Item is reduced by 2.5 months and the **Net Price** is set to 450.00, the monthly fee for the amended Term(4/15 – 6/15) is increased from 100 per month to 225 per month.

Because the amendment is mid-cycle and the April Billing Schedule is unbilled, it is then superseded and replaced with two new Billing Schedules.

- BS1 reflects the amount at the old rate for the partial period prior to the amendment date and is calculated as a *debit* when an Invoice is generated.
- BS2 reflects the new amount for the partial period that was amended and is calculated as a *debit* when an Invoice is generated.

Also, the Billing Schedule for May is unbilled and is superseded with one new Billing Schedule. This new Billing Schedule reflects the new monthly rate and is calculated in the next Invoice that you generate for the corresponding Asset. The Billing Schedule for June is unbilled and its period is shortened, it is superseded and replaced with the following new Billing Schedules.

- The 1st new Billing Schedule reflects the new amount for the partial period that was amended and is calculated as a *debit* when you generate an Invoice.
- The period in June is shortened and the 2nd new Billing Schedule reflects the amount for the partial period of June that is *dropped* because the End Date is shortened.

The Billing Schedules for July and August are unbilled and they are *dropped* because the End Date is shortened they are marked as *Cancelled.*

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Example 2

Consider another example where you shorten the **End Date** of the customer's software subscription plan, mid-cycle when the status of some Billing Schedules is **Pending Billing** and others is **Invoiced**.

Before you shorten the **End Date** of the subscription, you see the following Billing Schedules.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	100.00	
BS2	5/1/2015	5/31/2015	Invoiced	100.00	
BS3	6/1/2015	6/30/2015	Invoiced	100.00	
BS4	7/1/2015	7/31/2015	Invoiced	100.00	
BS5	8/1/2015	8/31/2015	Pending Invoiced	100.00	

After you shorten the End Date of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	4/1/2015	4/30/2015	Invoiced	100.00	**Yes**
BS6	**4/16/2015**	**4/30/2015**	**Pending Billing**	**-50.00**	
BS7	**4/16/2015**	**4/30/2015**	**Pending Billing**	**112.50**	
BS2	5/1/2015	5/31/2015	Invoiced	100.00	**Yes**
BS8	**5/1/2015**	**5/31/2015**	**Pending Billing**	**125.00**	
BS3	6/1/2015	6/30/2015	Invoiced	100.00	**Yes**

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BS9	**6/1/2015**	**6/15/2015**	**Pending Billing**	**-50.00**	
BS10	**6/1/2015**	**6/15/2015**	**Pending Billing**	**112.50**	
BS11	**6/15/2015**	**6/30/2015**	**Pending Billing**	**-50.00**	
BS4	7/1/2015	7/31/2015	Invoiced	100.00	**Yes**
BS12	**7/1/2015**	**7/31/2015**	**Pending Billing**	**-100.00**	
BS5	8/1/2015	8/31/2015	**Cancelled**	100.00	

> **Note**
>
> The End Date of the Asset Line Item is reduced by 2.5 months and the Net Price is set to 450.00, the monthly fee for the amended Term(4/15 – 6/15) is increased from 100 per month to 225 per month.

Because the amendment is mid-cycle and the April Billing Schedule has been invoiced it will remain as invoiced and will be augmented with the following new Billing Schedules.

- BS1 reflects the amount already paid for the partial period that was amended and will appear as a *credit* when an Invoice is generated.
- BS2 reflects the new amount for the partial period that was amended and will appear as a *debit* when an Invoice is generated.

Because the period in June is shortened, the 3rd new Billing Schedule reflects a credit for the partial period of June after the End Date is shortened

Example 3

Consider another example where you shorten the **End Date** make it the same as the **Start Date** of the customer's software subscription plan mid-cycle to the same as the **Start Date**, when the status of some Billing Schedules is **Pending Billing** and others is **Invoiced**.

Before you shorten the **End Date** and make it the same as the **Start Date** of the subscription, you see the following Billing Schedules.

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Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	100.00	
BS2	2/1/2015	2/28/2015	Invoiced	100.00	
BS3	3/1/2015	3/31/2015	Invoiced	100.00	
BS4	4/1/2015	4/30/2015	Pending Invoiced	100.00	

After you shorten the End Date of the subscription, the number of and the status of each Billing Schedule changes.

Schedule	Period Start	Period End	Status	Fee Amount	Superseded
BS1	1/1/2015	1/31/2015	Invoiced	100.00	
BS2	2/1/2015	2/28/2015	Invoiced	100.00	**Yes**
BS5	**2/8/2015**	**2/21/2015**	**Pending Billing**	**-50.00**	
BS6	**2/8/2015**	**2/21/2015**	**Pending Billing**	**80.00**	
BS7	**2/22/2015**	**2/28/2015**	**Pending Billing**	**-25.00**	
BS3	3/1/2015	3/31/2015	Invoiced	100.00	**Yes**
BS8	**3/1/2015**	**3/31/2015**	**Pending Billing**	**-100.00**	
BS4	4/1/2015	4/30/2015	**Cancelled**	100.00	

The new Term in this scenario is from 2/8/2015 to 2/21/2015 and the Net Price will be 80.00.

Because the amendment is *mid-cycle* and the February Billing Schedule has been invoiced it will remain as invoiced and because the *end date* of the Asset has been reduced to February it will be *augmented* with the following new Billing Schedules.

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- BS1 reflects the amount already paid for the partial period that was amended and will appear as a *credit* when an Invoice is generated.
- BS2 reflects the new amount for the partial period that was amended and will appear as a *debit* when an Invoice is generated.
- BS3 is to account for the end of the period that is being *dropped* and will appear as a *credit* when an Invoice is generated.

The Billing Schedule for March is invoiced and is *removed* because the End Date is shortened.

A new Billing Schedule is created to credit the amount that was already invoiced. Because the End Date is shortened and the period for August is unbilled, the Billing Schedule is marked as *Cancelled.*

Installed Products Page

Installed Products page is redesigned for quick search of assets and better control on column visibility. The Grid UI for Installed Products, gives better performance in terms of page load time and navigability.

⚠ Apttus CPQ supports only the Asset Grid UI.

ⓘ Styling for Installed Products Page

You can apply column settings to the Installed Products page. You can change coloring, formatting, and styling of the angular and the asset grid pages. This helps you customize the look and feel of the Installed Products page for better readability.
You can see the **Search** bar adjacent to the installed products header area on the right corner on both Asset and Assets Grid pages.
You can see a floating menu for the Asset Grid page similar to the Cart Grid page.
You can see pagination at the top of the Asset Grid page, which helps proper page alignment. Also notice that left side search filter section get collapsed by default.

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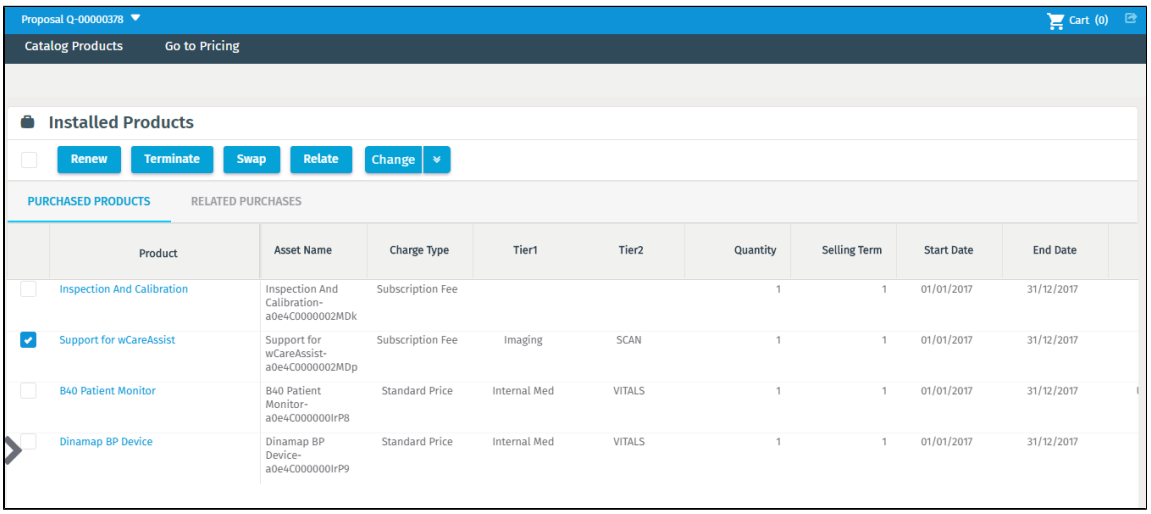

From the new user interface, you can

- Perform ‘Find as You Type’ search on the assets,
- Expand or Collapse the product attributes,
- Use Pagination to control the display of assets on a single page, and
- Hide or Pin each column based on your preference. Pinning a column will freeze its location to extreme left or right of the view as chosen from the options.

To enable the new interface, append *grid* at the end of the Installed Products URL. For example,

https://apttus-config2.cs13.visual.force.com/apex/Cart?cartStatus=New&oldConfigId=a1IW0000000gybHMAQ&configRequestId=a1cW000000044MrIAI&id/assets

should be changed to

https://apttus-config2.cs13.visual.force.com/apex/Cart?cartStatus=New&oldConfigId=a1IW0000000gybHMAQ&configRequestId=a1cW000000044MrIAI&id=a1IW0000000gyt7MAA&flow=LAngFlow&launchState=cart#/assetsgrid

Similarly, you can switch back from the grid UI to the classic interface by removing *grid* from the URL.

Note

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Internet Explorer browser does not support the vertical scrollbar for Installed Products and Cart Page.

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Working with Service CPQ

Service CPQ feature caters to customer requirements that are related to services for existing or newly purchased products from Apttus. A sales rep owns an equipment that is sold to customer and associates a service product with an equipment or asset. A sales rep has the visibility to the end to end cycle through the following pages for service management:

- Installed Products page
- Service Catalog page
- Service Config page
- Service Cart page

For an exisiting asset which is not being serviced yet, the system administrator (admin) can classify it under equipment or service product type. To see how services are loaded on Installed products page, refer to Service on Installed Products page.

All the service products and the assets are associated based on the eligibilty rules that is the framework for service eligibilty at large. For defining the eligiblity constraint rule criteria you as an admin have to use `Match in Related Lines` option for the OEM product, for instance. This criteria hides all other OEM products on the Sevice Catalog page through Exclusion type constraint rule that you must set. The constraint rule action intent is scoped to other OEM products under a product family or product group to make them ineligible (block them) when the rule is triggered. To see how services are configured, refer to Configuring a Service Product, Creating Constraint Rule Conditions, and Creating Constraint Rule Actions in the admin guide.

The service catalog page displays only the eligible service products for the selected assets or equipments. As a sales rep, you can configure the bundle product for setting the entitlements or offerings for the customer. For example, 24x7 support under a bundle product of annual maintenance contract. To see the new Service Catalog page, refer to Configuring a Service Product.

When you go to the cart page, you can see the service line items and the related asset line items along with weightage details for each asset. The weightage amount or percentage value drives the service allocation for the customer. For example, you can set 60:40 service allocation amongst two service products depending upon service implementation needs. To see the cart grid actions, refer to Viewing the Service Cart and Viewing the Cart in Grid View.

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Service pricing for the selected assets is available only on the Angular Cart Grid UI but not on the Angular Cart UI. Also, you can see the Related Line Items menu option for the service product only after the System Administrator configures the Flow Setting for the Angular Cart Grid.

Service on Installed Products page

Apttus CPQ supports only the Asset Grid UI.

For the Service CPQ functionality, the Installed Products page is enhanced to include the following two tabs:

Purchased Products: This tab displays the existing assets for an Account. This is similar to the old Installed Products page.

On the **Installed Products** page, after selecting the asset when you click **Relate**, Service CPQ displays **Relate Component** pop up that contains a selectable list of options. After you relate the options with the selected asset or equipment, when you click **Next**, Apttus CPQ takes you to the **Service Catalog** page.

Related Purchases: This tab displays the relevant services configured for an asset (equipment) for an Account. All these service products are loaded into the Service Catalog. From the Service Catalog, all the service products are configured as a normal product in Apttus CPQ system. The columns in this tab are configured using **Display Column Settings > Display Type** = *Related Purchases* for your flow name.

A new button named **Relate** is introduced on the Installed Products page. Clicking **Relate** button associates your asset products with the available services. You can change the label and alignment of **Relate** button from **Display Action Settings > Display Type =** *Installed Products* for your flow name.

Support for Related Line Items at the Option Level

- You can view the related lines associated with the component in the cart from an icon at the option level.

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- You can add or delete components using the **Add** or **Remove** buttons.

This allows you to select and sell services at the component level and view the details in the cart.

Coverage Status of Assets

Apttus CPQ provides a Boolean field **Is Primary Service** on Asset Line Item object, which is disabled by default.

You can enable it to view the coverage status of your assets:

- Installed Product (Asset Grid) page shows Service Product columns if Show Coverage for Primary Service is set to true and you have added all the columns to column settings.
- You need to mark the service as a Primary Service in asset line item manually or by any custom setting. Apttus CPQ does not have provision on the UI to mark the service as Primary.
- Only one primary service is associated to an equipment. In case of more than one primary service associated with an equipment, Apttus CPQ shows the coverage status data for the first available service.
- You can see the service along with its start and end dates along side the equipment asset without any clicks.
- Primary Service: Product shows proper name of service product.
- Primary Service: Start Date shows a start date of service product.
- Primary Service: End Date shows an end date of service product.
- Primary Service: Weighted Net Price shows Net price of weightage that is distributed among equipment.
- You can see the dynamically generated coverage status of the asset on the page as follows:
    - If the equipment has a service of type warranty and if the end date of the warranty is less than the day of the analysis, the status is Out of warranty.
    - If the equipment has a service of type warranty and if the end date of the warranty is greater than or equal to as opposed to the day of analysis, the status is In warranty.
    - If the equipment has a service of type contract and if the end date of the contract is less than the day of analysis, the status is Out of contract.

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- If the equipment has a service of type contract and if the end date of the contract is greater than or equal to the day of analysis, the status is In contract.

- You can also search your assets by using the coverage status on the Installed Products page.

You need to enable **Show Service Coverage** custom setting in order to view the coverage status columns on the Installed Products (Asset Grid) page.

Enabled Match in Options support for Related Asset Lines

When you relate a bundle (asset), the eligibility rule is triggered at the option and bundle level and based on the eligibile purchases for the option of a service, you can do the following:

- Sell services for a bundle or option
- Select the options for which you want to add a service coverage

When a service catalog launches after relating the assets with options, eligibility rules check "Match in Options" for related lines condition and accordingly disables or enables valid services.

ABO Support for Renewals on Services

During service renewal, you can update equipment items for the service. You can terminate the equipment line items or you can add them to additional services or extend coverage to the quote. While renewing a service, on the cart grid you can see all related equipment in the Related Items pop-up and when you click Add or Remove, on the Installed Products page only services get selected. It has been observed that the relationship between a service and an equipment is established, however currently you may not be able to add or remove related line items from the equipment.

Displaying Assets from the Account Hierarchy

You can view all the assets of either the parent or the child on the **Installed Products** asset grid page and search them using various criteria.

To set the account hierarchy

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1. Under **Custom Settings** > **Installed Product Settings** > **Show Assets**, specify **Parents, Children**.

   - If **Show Assets** is blank, on the asset grid page you cannot see an icon for **Account Hierarchy** and Apttus CPQ shows only assets from the current account.
   - If **Show Assets** set to **Parents, Children**, on the asset grid page you can see an icon for **Account Hierarchy** and Apttus CPQ shows assets from the current account as well as from Parent and Children.

2. Add or update the Accounts that you want to be displayed in the **Account Hierarchy** screen on the asset grid page.
3. Execute the batch job in CPQ Console > Maintenance Console > Account Hierarchy, whenever you add or update account's parent or create a new acccount with parent.
4. Click **Account Hierarchy** icon on the asset grid page. The **Account Hierarchy** pop-up opens.
5. Select the account for which you want to view the list of assets. The default account is always marked in bold in the **Account Hierarchy** pop-up.
6. Click **Apply** in the pop-up to see the list of asset for a particular account in the right pane. You can see the hierarchy of assets under **Account Hierarchy** icon in the left pane.

Configuring a Service Product

You can configure a service product from the catalog after you set the product type as a Service or an Equipment. When you go to the Service Catalog page, you can see all the service products that are associated with your assets or equipments for a new service. For a service product you have to follow the same procedures that are given in the topic, Configuring a Product from the Catalog.

- Displaying the eligible services on catalog: The Service Catalog page displays the eligible service products that you can associate with the assets.
- Displaying the assets on catalog: On the Service Catalog page, click the **Selected Assets** link to view the assets and their corresponding details.
  Selected options of an Equipment bundle from the **Assets** page appear on the **Selected Assets** pop-up both in Catalog and Configuration page.

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- Displaying the custom fields for assets: On the Service Catalog page when you open the **Selected Assets** pop up, it displays the custom fields that you configured for your asset. You can populate the desired fields of asset line items in the **Selected Assets** pop-up.
- Supporting the entitlements non-exclusive to all assets: You can select a service offering (entitlement) on the service catalog and configure it for one or more purchased products (assets). For example, you can select 24x7 support for the Order Management product.
- Applying the eligible entitlements to assets: You can see and configure the service offerings (entitlements) that are applicable to your assets. The Apttus CPQ disables the non-eligible entitlements for selection on the service catalog. If you select an entitlement that is not applicable to any purchases products, Apttus CPQ displays an error message.
- Supporting the catalog actions on the service catalog: An Apttus CPQ supports the catalog actions on the service catalog as well. For example, searching for services, display charge types beside services, configure a service bundle, add service to the cart, and so on.
- Displaying three columns for the attributes: On the configuration page you can see three columns for the product attributes. This behavior is governed by the Three Column Attribute Display checkbox from the Product Attribute Group page.
- On options, Apttus CPQ displays an icon next to options with **Related Assets** on the configuration page. This helps you to see which assets are related to the options of a bundle by invoking the pop-up on the right side.

Use Case: Configuring a service product

Description : This use case describes how to configure a service product that improves the user experience of the customer post purchase.

Suppose ABC is the OEM manufacturer of the selected asset, **Bundled ABC Software and Hardware**. Apttus CPQ provides the following Service Offerings or Entitlements:

- 24x7 Same Day Onsite Response
- 24x7 Support for Sev 1
- Proactive Support Services
- Remote Account Manager
- XYZ Specialist Service = This product option is not available (greyed out) to sales rep because this is not eligible for the selected asset.

In the following example, the sales rep configures the product.

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Prerequisite: Make sure that system administrator has configured the product type and the eligibility rules. For more information, see Working with Service CPQ.

To configure a service product

1. You can select a product by doing any of the following:
    - From the Browse Catalog list, select a category hierarchy you want to view.
    - From the Browse section, navigate to the category hierarchy for **Bundled ABC Software and Hardware**.
    - In the Search bar, type a category or product name and click **Search.**
2. From the Service Catalog section, to configure options for a product, click **Configure** next to it. The selected product is displayed in the Selected Products section on the right and the options page is displayed.
3. Select the options for your bundle, and do any of the following:
    - Click **Add More Products**, to add additional products.
    - Click **Remove Item**, to remove a product.
    - Click **Go to Pricing** to price the product.
    - Click **Save** to save your selected product for that quote.
    - Select **Optional** to consider a particular line item as an optional one.

    The values in the **Quantity** field for options can be driven by the numeric expression builder configured for the selected option.
    The **Save** button is used in case you want to save your configuration before proceeding to the attributes and cart page. For example, if you change the **Quantity** of the options associated with your bundle product, you might want to save the configuration before moving to the cart page.

Result: Bundled ABC Software and Hardware is configured and ready to be added to the cart.

Next Step: On the cart page, a sales rep can verify the following details and then finalize the cart.

- Weightage of the each service product
- Pricing and quantity
- Association between the service product and the selected asset
- Related asset line items and service line items

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Viewing the Service Cart

After you configure a product on the Service Catalog and add it to the cart, the following user actions are available on the Service Cart:

- Apttus CPQ supports the cart grid actions on the service cart as well, except the copy function. You cannot copy a service product for reuse.
- On the cart page, you can see the service lines for the bundle options as well as for the standalone product.
- On the cart page, when you go to more button for a product, you can see the Related Line Items menu option. The related line items are nothing but your assets that are associated with the service line.
- You can modify the related line items that are associated with the service line. Select the product (asset) from the Related Line Items pop up and click change to relate a desired product with a service product. On the Service Catalog page, click Update to confirm the service product association with the new asset.
- You can edit the weightage for your assets based on the business requirements. You can set the percentage or amount as the Weightage Type, however ensure that the total weightage must add up to 100 (For details, see Field Set Settings in the admin guide).

For more information on the Service CPQ feature, see Working with Service CPQ in the user guide.

For more information on the cart grid actions, see Viewing the Cart in Grid View in the user guide.

For more information on the Installed Products see Installed Products Settings in the admin guide.

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Glossary of Apttus Approval Stages

This section describes the purpose of the different Approval Stages.

Field Value	Description
Draft	New Quote Created.
Approval Required	Changes to the Quote or Quote Line Items have triggered a need for approval.
In Review	Quote is in the process of being Approved or Denied.
Approved	Quote has been approved by management.
Generated	Quote document has been generated.
Presented	Quote document was presented to the end customer, either via email or manually.
Accepted	Quote was accepted by the end customer.
Denied	Quote has been denied by management.

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Glossary of Proposal Actions

This section describes the actions available at various stages of the proposal and their significance.

> These actions are fields and they are configurable by the System Administrator per your business process requirements.

Configure Products

Action	
Description	Starts a new configuration process for the Quote, or reconfigure an existing set of products on the Quote.
Availability	If approval stage is *Draft*.

Generate Proposal

Action	
Description	Generates a Proposal document and attaches it to the Quote/Proposal record.
Availability	Always Available if Ready to Generate is set to *true*.

Present Proposal

Action	
Description	Presents the attached document to the Quote to the end customer through an email.

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Action	
Availability	Always Available if Ready to Present is set to *true*.

Accept Proposal

Action	
Description	Accept refers to an end customer *Accepting* the final proposal. This button synchronizes all Summary lines with the Opportunity Products for the Related Opportunity.
Availability	If approval stage is *Presented*.

Make Primary

Action	
Description	Sets this Quote to primary and all other Quotes for the Opportunity non Primary. Also enables the Synchronize with Opportunity button.
Availability	If Primary flag is *false*.

Synchronize with Opportunity

Action	
Description	Synchronizes the finalized quote with the Opportunity, each time the cart is Finalized. If you are using automatic synchronization, you should remove this from the page layout.
Availability	If Primary flag is *true*.

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Create Agreement with Line Items

Action	
Description	Once accepted, the final step is to create the contract.
Availability	If approval stage is *Accepted*.

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Glossary of New Related Lists

This section describes the various related lists enabled after the draft proposal record is created.

Name	Description
Actions	Lists the various actions you can execute for this stage of the quoting process. A list of actions with the description of their function is available in Proposal Actions .
Line Items	Contains the detailed line items (bundles, options, and standalone) of a finalized configuration. This corresponds to the Detail tab in configuration.
Summary	Contains the summary view (standalone and bundles) of a finalized configuration. This corresponds to the Summary tab in configuration.
Summary Groups	Contains the totals for the finalized configuration according to the product hierarchy including a Grand Total.
Notes & Attachments	Enables you to attach any reference document or file relevant to a quote /proposal. The proposal document when generated from the template is stored by the application in this section.
Open Activities	Enables you to create and assign new task corresponding to a quote.
Approval History	Initiate and track approvals corresponding to the quote.Note: Approvals can be initiated only if the corresponding approval processes have been set up by the System Administrator.
Activity History	Lists an Audit history of significant changes during the life of the quote.

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