



Deal Maximizer on Salesforce Summer 2020 User Guide



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About This Guide

With Deal Maximizer on Salesforce User Guide, you can find out how to use Apttus Deal Maximizer and deal guidance process to rate deals.

Topic	Description
What's Covered	This guide is designed to provide the Sales rep with information on using Apttus Deal Maximizer. This guide covers the most common use cases for Deal guidance.
Primary Audience	Admin users involved with the CPQ process in your organization.
IT Environment	Refer to the latest Apttus Deal Maximizer on Salesforce Release Notes for information on System Requirements and Supported Platforms.
Other Resources	<ul style="list-style-type: none"> • <i>Deal Maximizer on Salesforce Administrator Guide</i>: Refer to this guide for information on configuring Deal Maximizer. • <i>Deal Maximizer on Salesforce Release Notes</i>: Refer to this document for information on system requirements and supported platforms, new features and enhancements, resolved issues, and known issues for a specific release.

This guide describes the following tasks:

- Using Deal Guidance

Before using Deal Maximizer you must be familiar with Apttus terms and definitions.

What's New

The following table lists changes in the documentation to support each release.

Document	Topics	Description
Summer 2020	All topics	New Guide.

About Deal Maximizer

Apttus Deal Maximizer provides you means to determine if a deal is appropriate based on a set of rules defined by the administrator. Color bands are displayed on the cart to help you determine if a deal is good or not. The feature guides you to present a deal that aligns with your organization's objectives which in turn motivates you to give lesser discounts to fast track the deals. The administrator defines Deal Guidance Rules that are used to rate the deal. Deals can be rated at the header level, such as an opportunity, agreement, or deal. You can also be at the line item level for a quote or a deal. Apttus Deal Maximizer takes line item fields like Adjustments, to determine whether the deal is good.

Apttus Deal Maximizer allows a user to perform the following tasks:

- Use Deal Guidance Rules on the cart to improve a deal.
- View Deal Guidance Rules on the cart.

Key Terminology

It is important to understand how terms are used when working with Apttus Deal Maximizer.

Term	Description
Color Bands	Color and shape used to depict the pricing bands based on the deal guidance rule that matches the deal or shopping cart line.
Deal Maximizer	Apttus solution that enables rule-based system to deliver pricing guidance for in-flight deals that meet corporate revenue and margin objectives.
Deal Ratings	Colors depicting the pricing bands based on the deal guidance rule that matches with the deal or shopping cart line.
Deal Guidance Rules	Guidance rules are used to identify the most appropriate pricing guidance for a given cart line item or the deal (with all the line items). The rules are evaluated to fine the appropriate rule entry that matches with the given cart line item or the deal.

For more information about terms used with Apttus products, see [Glossary](#).

About Deal Guidance

Deal Maximizer is a set of rules that displays a deal color band based on the pre-defined constraints set by the administrator. The deal color band is displayed right in the cart for each line item, so any changes can be in real-time. You can see the rating of the current deal and gain visibility into approval requirements ahead of time. Deal Maximizer guides you towards optimal deals that align with the organization's objectives. You can view the rules that define the various criteria of a good deal. Deal Maximizer uses data stored on the Line Item to determine deal acceptability based on one parameter or a combination of parameters.



The rules are set up based on Opportunity, Agreement, Agreement Line Item, Deal, Deal Line Item, Line Item, or Product Configuration. The Rule Criteria Measure Options can be set as *Unit Price*, *Annual Price per Unit*, *% Discount*, *Discount Amount*, and *% Margin*. There are also criteria based rules that are either a discrete value or a range.


On the Cart, you can view Meta Data from these objects, in order to display the validity of the specific deal. Once the rules have kicked in and the Deal Color Band appears, you have a few options. If the Deal Color Band shows the deal as below average, you can still technically approve the deal. However, this is not the best practice as it is very unlikely that the deal will be approved. Instead, you should reconfigure the deal and structure it in a way that moves the Deal Color Band from below average to average or above average.







Your administrator must define the **isPricingGuidanceDisabled** parameter in the URL that you have configured on the **Configure Products** field of the respective quote to turn the feature on or off. For more information, see "Creating Custom Buttons for Different Flows" in *CPQ on Salesforce Administrator Guide*

Using Deal Guidance

You must first add products to cart to use Deal Guidance. When you update a field of a line item that is a parameter for the deal rating and reprice the cart, a colored shape is displayed in the **Guidance** field. For example, if you apply an adjustment on the line item by providing a discount of 25%.

Total (Monthly)		Total (One Time)		Grand Total							
USD 7.50		USD 100.00		USD 107.50							
<div style="display: flex; justify-content: space-between; align-items: center;"> Default View <input type="text" value="Search"/> Apply Promotions on Totals Add More Products Revalidate Finalize </div>											
#	Product	Quantity	Net Price	Guidance	Net Unit Price	Product Uom	List Price	Selling Term	Adjustment		
1	KS_Product_SA_1	1.00	USD 7.50		USD 7.50	Each	USD 10.00	1.00000	-25.00%		
2	KS_Product_SA_2	1.00	USD 100.00		USD 100.00	Each	USD 100.00	1.00000	0.00%		

A colored shape () is displayed in the **Guidance** field according to the defined rule in the below image, indicating that the deal is below average. You can open the **Pricing Guidance** pop-up, like the one below by clicking the colored shape that is displayed in the **Guidance** field. The pop-up lists the range in which you can apply discounts and how the deal is rated. You can update the fields with a value that brings the deal under a more desirable range using the rule pop-up.

Pricing Guidance X				
Guidance Parameters				
	% From	% To	Price From	Price To
 Target	0	5	10	9.5
 Acceptance	5	10	9.5	9
 Good	10	15	9	8.5
 Average	15	20	8.5	8
 Below Average	20	25	8	7.5
 Not Good	25	99999	7.5	-9989.9

You can finalize the cart even though the deal is not appropriate unless there are other approvals are required.

Glossary of Deal Maximizer Terms

Term	Description
Color Bands	Color used to depict the pricing bands based on the deal guidance rule that matches with the deal or shopping cart line.
Deal Maximizer	Apttus solution that enables rule based system to deliver pricing guidance for in flight deals that meet corporate revenue and margin objectives.
Deal Ratings	Colors depicting the pricing bands based on the deal guidance rule that matches with the deal or shopping cart line.
Deal Guidance Rules	Guidance rules are used to identify the most appropriate pricing guidance for a given cart line item or the deal (with all the line items). The rules are evaluated to fine the appropriate rule entry that matches with the given cart line item or the deal.
Opportunities	Salesforce Standard object that allows you to create opportunity records.
Product Attributes	Are used to associate certain features to a product. Examples of common attributes are color, size, weight, and more.
Product Configurations	Set of products with other characteristics such as attributes and more.
Proposal Line Items	Represents a proposal line item.
Product Configuration Line Items	Represents a bundled product line item.
Scope	Filters to identify the right deal guidance rules for a given cart line item or the deal.
Quote/Proposals	The Apttus custom object used to record information about a specific quote for a specific Opportunity and Account. The tab for the object is presented as Proposals and the record is stored as a Quote/Proposal.

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