



# **Deal Maximizer on Salesforce Summer 2020 Administrator Guide**



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## About This Guide

With Deal Maximizer on Salesforce Administrator Guide, you can find out how Apttus Deal Maximizer works and how to set up a deal guidance process to rate deals.

Topic	Description
What's Covered	This guide is designed to provide administrators with information on configuring Apttus Deal Maximizer. This guide covers the most common use cases for administration.
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.
Updates	For a comprehensive list of updates to this guide for each release, see the <a href="#">What's New</a> topic.
Other Resources	<ul style="list-style-type: none"> <li>• <i>Deal Maximizer on Salesforce User Guide</i>: Refer to this guide for information on features and use cases of Deal Maximizer.</li> <li>• <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.</li> </ul>

This guide describes the following tasks:

- Configuring Deal Guidance Dimensions
- Configuring Deal Guidance Dimension Sets
- Configuring Deal Guidance Rules
- Initiating and integrating Deal Guidance
- Setting Up Deals

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	Topic	Description
Summer 2020	<a href="#">Define Color Bands and Shapes</a>	Updated the topic with information about support for shapes.
	<a href="#">Installing Deal Maximizer</a>	Updated the topic description.
Spring 2020	<a href="#">Define Deal Guidance Rules</a>	Updated topic with scalability improvement for deal guidance process.

## About Deal Maximizer

With Apttus Deal Maximizer, you can setup rules that define what a good deal is, and this deal rating is available to the sales rep at the time of negotiating a deal. Sales reps can see the rating of their current deal, gain visibility into approval requirements ahead of time, which in turn motivates them to give lesser discount to fast track the deals.

This functionality guides the sales rep towards proposing good deals. Deals can be rated at the header level, such as an opportunity, agreement, or deal. They can also be at the line item level for a quote or a deal.

Apttus Deal Maximizer allows an administrator to perform the following administrative tasks:

- Installing Deal Maximizer
- Recommended Post-Installation Configuration
  - Configuration for Deal Guidance Dimension
  - Configuration for Deal Guidance Dimension Sets
  - Configuration for Deal Guidance Rules
  - Initiate and Integrate Deal Guidance
- Setting Up Deals
  - Define Color Bands
  - Define Custom Measure
  - Define Deal Guidance Dimensions
  - Define Deal Guidance Dimension Sets
  - Define Deal Guidance Rules
    - Guidance for Custom Measure
  - Rule Measure Formulas

## Key Terminology

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

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.

Term	Description
Deal Ratings	Colors depicting the pricing bands based on the deal guidance rule that matches with the deal or shopping cart line.
Dimensions	Dimension is a field in one of the Business Objects used to arrive at the pricing guidance. For example, Terms on Cart Line Item can be a Dimension, and it can be used to identify matching Deal Guidance Rules to evaluate for a given cart line item.
Dimension Sets	Used to group Dimensions for use with Deal Guidance Rules.
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 find 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](#).

# Getting Started with Apttus Deal Maximizer

## Installing Deal Maximizer

Multiple packages must be installed to implement the complete Deal Maximizer solution. Packages for Deal Maximizer must be installed in the order indicated in this section, with integration to CPQ, Advanced Approvals, and Contract Management. You begin with the Apttus base packages and then install the integration packages that enable various products to function together.

### Caution

Apttus recommends downloading and upgrading Apttus packages in a Salesforce sandbox **before** installing them in your production environment. For information on installing and upgrading in a sandbox, please contact Apttus Support before you install any packages.

You must install the packages in the following order before you install Deal Maximizer packages:

- Apttus Base Library
- Apttus Contract Management
- Apttus Proposal Management
- Apttus Approvals Management
- Apttus Configuration & Pricing
- Apttus Quote/Proposal-Configuration Integration
- Apttus Quote/Proposal-Asset Integration
- Apttus CPQ API
- Apttus Quote/Proposal Approvals Management
- Apttus Contract-Configuration Integration
- Apttus Quote/Proposal-Contract Integration

 For more information on the package versions, refer to the latest *CPQ on Salesforce Release Notes*.

Install the following Deal Maximizer packages after you install the above-mentioned packages:

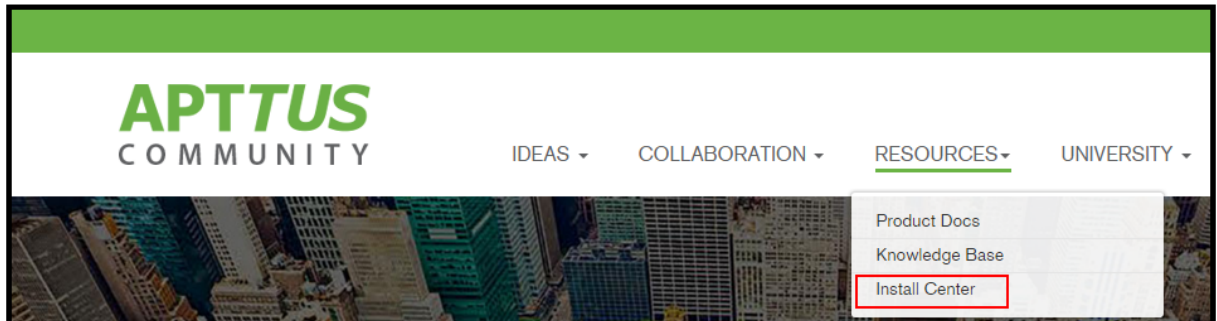
- Apttus Deal Maximizer Setup
- Apttus Deal Maximizer
- Apttus Deal Approvals Management
- Apttus CPQ Approvals Management
- Apttus CPQ Maximizer

**Note**

You must have Apttus-provided login credentials to the Apttus Community Portal to be able to download packages.

## To install the CPQ module packages

1. Go to the **Install Center** tab on the Apttus Community Portal.



2. In **My Packages** navigation link, click **Deal Maximizer**. From the **VERSION** drop-down, select the version that you want to install.



MY PACKAGES		MY PACKAGES																																	
<ul style="list-style-type: none"> <li>MY PACKAGES -</li> <li>All Products</li> <li>Contract Management</li> <li>CPQ</li> <li>Advanced Approval</li> <li>Deal Maximizer</li> <li>X-Author for Excel</li> <li>X-Author Chatter</li> <li>Billing</li> <li>Revenue Management</li> <li>Supplier Relationship Management</li> <li>Docusign Integration</li> <li>Echosign Integration</li> <li>Integrations</li> </ul>		<h3>Contract Management</h3> <table border="0"> <tr> <td><b>Apttus Contract Management</b></td> <td>Version: 8.5.0354</td> <td><a href="#">Install Now</a></td> <td><a href="#">Read More</a></td> </tr> <tr> <td><b>X-Author for Contracts</b></td> <td>Version: 8.5.822</td> <td><a href="#">Download</a></td> <td><a href="#">Read More</a></td> </tr> <tr> <td><b>Apttus Migration Manager</b></td> <td>Version: 8.0.610</td> <td><a href="#">Download</a></td> <td><a href="#">Read More</a></td> </tr> <tr> <td><b>X-Author Contracts for Outlook</b></td> <td>Version: 2.0.0701</td> <td><a href="#">Download</a></td> <td><a href="#">Read More</a></td> </tr> <tr> <td><b>Apttus Document Generation</b></td> <td>Version: 1.0.0005</td> <td><a href="#">Install Now</a></td> <td><a href="#">Read More</a></td> </tr> </table> <h3>CPQ</h3> <table border="0"> <tr> <td><b>Apttus Proposal Management</b></td> <td>Version: 8.2.0124</td> <td><a href="#">Install Now</a></td> <td><a href="#">Read More</a></td> </tr> <tr> <td><b>Apttus Configuration &amp; Pricing</b></td> <td>Version: 9.9.1114</td> <td><a href="#">Install Now</a></td> <td><a href="#">Read More</a></td> </tr> <tr> <td><b>Apttus CPQ Api</b></td> <td>Version: 9.0.0056</td> <td><a href="#">Install Now</a></td> <td><a href="#">Read More</a></td> </tr> </table>		<b>Apttus Contract Management</b>	Version: 8.5.0354	<a href="#">Install Now</a>	<a href="#">Read More</a>	<b>X-Author for Contracts</b>	Version: 8.5.822	<a href="#">Download</a>	<a href="#">Read More</a>	<b>Apttus Migration Manager</b>	Version: 8.0.610	<a href="#">Download</a>	<a href="#">Read More</a>	<b>X-Author Contracts for Outlook</b>	Version: 2.0.0701	<a href="#">Download</a>	<a href="#">Read More</a>	<b>Apttus Document Generation</b>	Version: 1.0.0005	<a href="#">Install Now</a>	<a href="#">Read More</a>	<b>Apttus Proposal Management</b>	Version: 8.2.0124	<a href="#">Install Now</a>	<a href="#">Read More</a>	<b>Apttus Configuration &amp; Pricing</b>	Version: 9.9.1114	<a href="#">Install Now</a>	<a href="#">Read More</a>	<b>Apttus CPQ Api</b>	Version: 9.0.0056	<a href="#">Install Now</a>	<a href="#">Read More</a>
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3. Click **Install Now** and select *Production* or *Sandbox*.
4. Click the **Log in** to the AppExchange button. Log in with your Salesforce credentials.
5. Click the button for environment (production or sandbox) where you want to install the package.
6. Click the I have read and agree to the terms and conditions checkbox and click the **Confirm and Install!** button. You may have to log in to Salesforce again with your credentials.
7. On the Upgrade page, type the Apttus provided password.
8. Verify the Package Installation Details and click **Upgrade**.
9. Review the package API access and click **Next**.
10. Select the security level.  
If you know the required settings, select Select Security Settings. Otherwise, we recommend you select Grant Access to All Users and refine the security settings later.
11. Click **Next**.
12. Click **Install**.

A message is displayed indicating the installation is underway. Once installed, repeat this procedure for each of the packages.

## Deal Maximizer Objects

This section lists out the objects inside the **Apttus Deal Maximizer Setup** package.

Objects	Purpose of the object
Deal Term	Represents the term associated with a deal.
Deal	Represents a deal.

Objects	Purpose of the object
Deal Color Band	Represents the deal rating colors and their percentile ranges.
Deal Summary Group	Represents a summary of deal line items.
Search Filter (Deal)	Represents a search filter.
Deal Guidance Dimension Set	Represents a set of dimensions shared by rules.
Deal Guidance Dimension	Represents a single dimension in a dimension set.
Deal Guidance Dimension Set Member	Represents a single dimension in a dimension set.
Deal Line Item	Represents a product or service line item associated with a deal.
Deal Guidance Rule Entry	Represents a single entry in a deal guidance rule.
Deal Guidance Rule	Represents a single rule in an deal guidance ruleset.

This section lists out the objects inside the **Apttus Deal Maximizer** package.

Objects	Purpose of the object
Comparable Deal	Represents a deal comparison.
Price Waterfall Component	Holds the components of a price waterfall.

## Configuring Post-Installation Settings

After you have installed the Deal Maximizer Setup, Deal Maximizer, and CPQ packages, you must configure some package objects before you can begin using the Deal Maximizer solution.

You must configure picklist values for deal objects, set field dependencies, integrate deal guidance into the shopping cart, and ensure that Deal Maximizer is available when you click Configure from a Quote/Proposal.

The first two are required to ensure that the drop-down lists are populated with the correct values when you create dimensions, dimension sets, and guidance rules. The last piece of configuration is done to make deal guidance available from the shopping cart, which

includes having an action button and deal guidance information available when you hover over a line item.

- [Configure Deal Guidance Dimension](#)
- [Configure Deal Guidance Dimension Sets](#)
- [Configure Deal Guidance Rules](#)
- [Initiate and Integrate Deal Guidance](#)

## Deal Manager System Properties

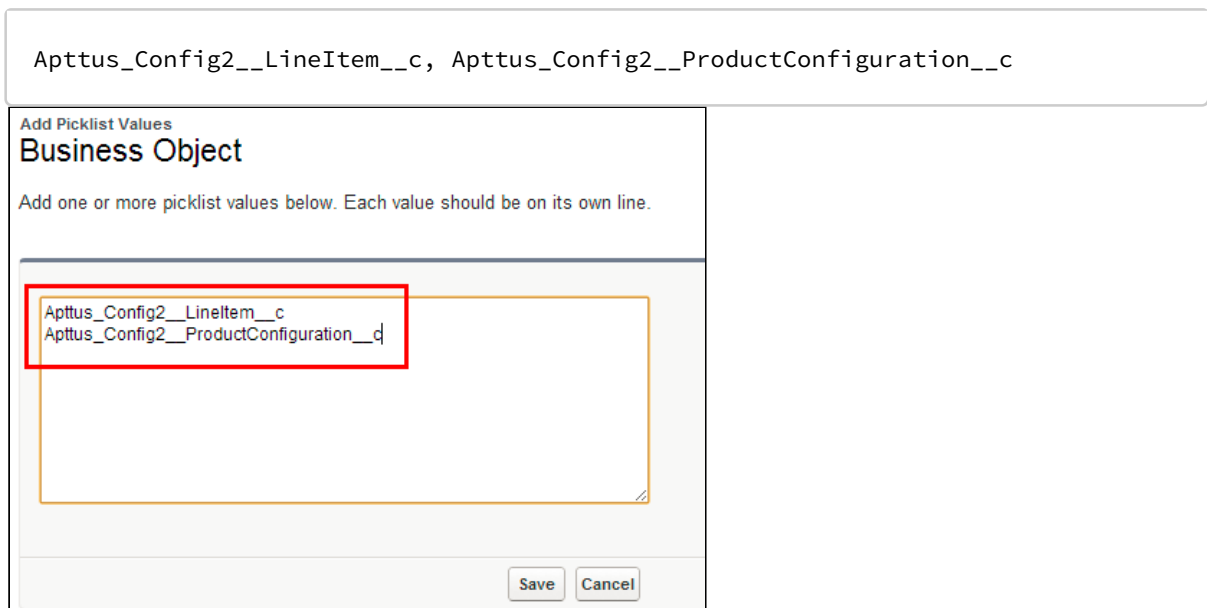
This section provides a brief description of all the Deal Manager System Properties. Navigate to **Setup** > **Custom Settings** > click **Manage** next to Deal Manager System Properties.

Setting	Description
Deal Guidance Callback Class	The deal guidance callback class name. The class should implement the CustomClass.IGuidanceCallback interface.
Deal Optimizer Callback Class	The deal optimizer callback class name. The class should implement the CustomClass.IDealOptimizerCallback interface.
Display Dimensions In Guidance	Indicator to display rule dimensions in the pricing guidance detail.
Display Net Price Per Unit In Guidance	Indicator to display net price per unit in the pricing guidance detail.
Hide Percentile Range In Guidance	Indicates whether percentile range will be hidden in the pricing guidance display. Either percentile range or price range may be hidden, not both.
Hide Price Range In Guidance	Indicates whether price range will be hidden in the pricing guidance display. Either percentile range or price range may be hidden, not both.

# Configuration for Deal Guidance Dimension

## Adding Picklist Values for Creating Deal Objects

1. Go to **Setup > Build > Installed Packages** and select **Apttus Deal Manager**.
2. Click **View Components** and from the Package Components list, access the Business Object (**Deal Guidance Dimension**).
3. From the **Picklist Values** section, click **New**.
4. Add the following two object references:



5. Click **Save**. The values are added to the Picklist Values for the business object and are now available when you create Deal Dimensions.

Picklist Values				
Action	Values	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	Opportunity	<input type="checkbox"/>	Assigned dynamically	<a href="#">Peter Livingston</a> , 8/26/2013 10:25 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Apttus__APTS_Agreement__c	<input type="checkbox"/>	Assigned dynamically	<a href="#">Peter Livingston</a> , 8/26/2013 10:25 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Apttus_DealMgr_Deal__c	<input type="checkbox"/>	Assigned dynamically	<a href="#">Peter Livingston</a> , 8/26/2013 10:25 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Apttus_DealMgr_DealLineItem__c	<input type="checkbox"/>	Assigned dynamically	<a href="#">Peter Livingston</a> , 8/26/2013 10:25 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Apttus_Config2_LineItem__c	<input type="checkbox"/>	Assigned dynamically	<a href="#">Peter Livingston</a> , 9/6/2013 4:08 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Apttus_Config2_ProductConfiguration__c	<input type="checkbox"/>	Assigned dynamically	<a href="#">Peter Livingston</a> , 9/6/2013 4:08 PM

# Configuration for Deal Guidance Dimension Sets

## Adding Picklist Values

1. From **All Tabs**, go the **Deal Guidance Dimension Sets** object.
2. From the **Custom Fields and Relationships** section, add following values to the **Business Object** picklist.

Custom Fields & Relationships							
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Business Object</a>	Apttus_DealMgr__BusinessObject__c	Apttus Deal Maximizer Setup	Picklist		<a href="#">Guidance Type</a>	QA Manager, 10/17/2016 10:44 PM
<a href="#">Edit</a>	<a href="#">Description</a>	Apttus_DealMgr__Description__c	Apttus Deal Maximizer Setup	Text Area(255)			QA Manager, 10/17/2016 10:44 PM
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Guidance Type</a>	Apttus_DealMgr__GuidanceType__c	Apttus Deal Maximizer Setup	Picklist			QA Manager, 10/17/2016 10:44 PM

Apttus\_Config2\_\_LineItem\_\_c, Apttus\_Config2\_\_ProductConfiguration\_\_c

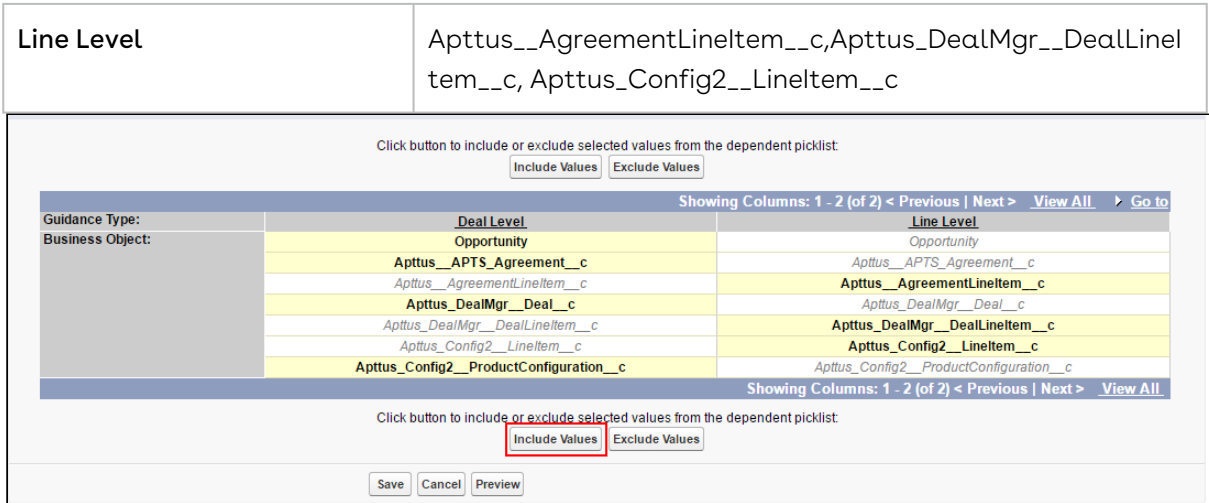
3. The values are added to the **Picklist Values** for the Business Object and are now available when you create **Deal Dimension Sets**.

Values						
Action	Values	API Name	Default	Chart Colors	Modified By	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Opportunity	Opportunity	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Apttus__AgreementLineItem__c	Apttus__AgreementLineItem__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Apttus_DealMgr__Deal__c	Apttus_DealMgr__Deal__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Apttus_DealMgr__DealLineItem__c	Apttus_DealMgr__DealLineItem__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Apttus_Config2__LineItem__c	Apttus_Config2__LineItem__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 11:25 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Apttus_Config2__ProductConfiguration__c	Apttus_Config2__ProductConfiguration__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 1/5/2017 11:07 AM	

## Setting Field Dependencies

1. Go to **Custom Fields & Relationships** and click **Guidance Type**.
2. In the **Field Dependencies** section click **New**.
3. For **Controlling Field** select *Guidance Type* and for **Dependent Field** select *Business Object* and click **Continue**.
4. For **Deal Level** and **Line Level** include the following:

<b>Deal Level</b>	Opportunity, Apttus__APTS_Agreement__c, Apttus_DealMgr__Deal__c, Apttus_Config2__ProductConfiguration__c
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5. Click **Save**. When you create a **Deal Dimension Set**, the appropriate deal and line level values will be displayed.

## Configuration for Deal Guidance Rules

### Adding Picklist Values

1. From **All Tabs**, go the **Deal Guidance Rules** object.
2. From the **Custom Fields and Relationships** section, add following values to the **Business Object** picklist.

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Business Object</a>	Apttus_DealMgr__BusinessObject__c	Apttus Deal Maximizer Setup	Picklist		Guidance Type	QA Manager, 10/17/2016 10:44 PM
<a href="#">Edit</a>	<a href="#">Description</a>	Apttus_DealMgr__Description__c	Apttus Deal Maximizer Setup	Text Area(255)			QA Manager, 10/17/2016 10:44 PM
<a href="#">Edit</a>   <a href="#">Replace</a>	<a href="#">Guidance Type</a>	Apttus_DealMgr__GuidanceType__c	Apttus Deal Maximizer Setup	Picklist			QA Manager, 10/17/2016 10:44 PM

Apttus\_Config2\_\_LineItem\_\_c, Apttus\_Config2\_\_ProductConfiguration\_\_c

3. The values are added to the **Picklist Values** for the Business Object and are now available when you create **Deal Guidance Rules**.

Values						
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit   Del   Deactivate	Opportunity	Opportunity	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
Edit   Del   Deactivate	Apttus_Config2__LinItem__c	Apttus_Config2__LinItem__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 11:29 PM	
Edit   Del   Deactivate	Apttus_DealMgr__DealLinItem__c	Apttus_DealMgr__DealLinItem__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 1/5/2017 11:14 AM	
Edit   Del   Deactivate	Apttus_APTS_Agreement__c	Apttus_APTS_Agreement__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 11:29 PM	
Edit   Del   Deactivate	Apttus_AgreementLinItem__c	Apttus_AgreementLinItem__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 11:29 PM	
Edit   Del   Deactivate	Apttus_DealMgr__Deal__c	Apttus_DealMgr__Deal__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 1/5/2017 11:14 AM	
Edit   Del   Deactivate	OpportunityLinItem	OpportunityLinItem	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 11:29 PM	
Edit   Del   Deactivate	Apttus_Config2__ProductConfiguration__c	Apttus_Config2__ProductConfiguration__c	<input type="checkbox"/>	Assigned dynamically	QA Manager, 1/5/2017 11:13 AM	

### Note

For **Deal Guidance Rule** object, you must make following changes to certain values in the **Business Object** field picklist:

1. Update the value **Deal\_\_c** to **Apttus\_DealMgr\_\_Deal\_\_c**
2. Update the value **DealLinItem\_\_c** to **Apttus\_DealMgr\_\_DealLinItem\_\_c**

4. If you have *upgraded* the package, you must add the value **Custom** to the **Measure** picklist field. On a fresh installation, this field will be available in the picklist.

Go to **Custom Field and Relationships**, click **Measure** and add a **New** value - *Custom*, to the picklist.

Values						
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit   Del   Deactivate	Unit Price	Unit Price	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
Edit   Del   Deactivate	Annual Price Per Unit	Annual Price Per Unit	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
Edit   Del   Deactivate	Net Price	Net Price	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
Edit   Del   Deactivate	% Discount	% Discount	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
Edit   Del   Deactivate	Discount Amount	Discount Amount	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
Edit   Del   Deactivate	% Margin	% Margin	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	
Edit   Del   Deactivate	Custom	Custom	<input type="checkbox"/>	Assigned dynamically	QA Manager, 10/17/2016 10:44 PM	

## Setting Field Dependencies

1. Go to **Custom Fields & Relationships** and click **Guidance Type**.
2. In the **Field Dependencies** section click **New**.

### Note

You have to set Field Dependencies for two fields - **Business Object** and **Measure**.

3. Field Dependency for **Business Object**

a. For **Controlling Field** select *Guidance Type* and for **Dependent Field** select *Business Object* and click **Continue**.

b. For **Deal Level** and **Line Level** include the following:

<b>Deal Level</b>	Opportunity, Apttus__APTS_Agreement__c, Apttus_DealMgr__Deal__c, Apttus_Config2__ProductConfiguration__c
<b>Line Level</b>	Apttus_Config2__LineItem__c, Apttus_DealMgr__DealLineItem__c, Apttus__AgreementLineItem__c, OpportunityLineItem

Click button to include or exclude selected values from the dependent picklist

Guidance Type:	Deal Level	Line Level
Business Object:	Opportunity	Opportunity
	Apttus_Config2__LineItem__c	Apttus_Config2__LineItem__c
	Apttus_DealMgr__DealLineItem__c	Apttus_DealMgr__DealLineItem__c
	Apttus__APTS_Agreement__c	Apttus__APTS_Agreement__c
	Apttus__AgreementLineItem__c	Apttus__AgreementLineItem__c
	Apttus_DealMgr__Deal__c	Apttus_DealMgr__Deal__c
	OpportunityLineItem	OpportunityLineItem
	Apttus_Config2__ProductConfiguration__c	Apttus_Config2__ProductConfiguration__c

Showing Columns: 1 - 2 (of 2) < Previous | Next > View All | Go to

Click button to include or exclude selected values from the dependent picklist

#### 4. Field Dependency for **Measure**

a. For **Controlling Field** select *Guidance Type* and for **Dependent Field** select *Business Object* and click **Continue**.

b. For **Deal Level** and **Line Level** include the following:

<b>Deal Level</b>	Net Price, %Discount, Discount Amount, %Margin, Custom
<b>Line Level</b>	Unit Price, Annual Price Per Unit, %Discount, Discount Amount, %Margin, Custom

Click button to include or exclude selected values from the dependent picklist

Guidance Type:	Deal Level	Line Level
Measure:	Unit Price	Unit Price
	Annual Price Per Unit	Annual Price Per Unit
	Net Price	Net Price
	% Discount	% Discount
	Discount Amount	Discount Amount
	% Margin	% Margin
	Custom	Custom

Showing Columns: 1 - 2 (of 2) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist



5. Click **Save**. When you create a Deal Guidance Rule, the appropriate deal and line level values will be displayed.

## Initiate and Integrate Deal Guidance

### Initiating Deal Maximizer from Configuration Action

1. Go to **Setup > App Setup > Create > Objects** and select **Quote/Proposal**.
2. Go to **Custom Fields & Relationships** and click **Edit** for the Configure Products (Apttus quote/Proposal-Configuration Integration) formula.

```
IF ( LEN( Apttus_QPConfig__PriceListId__c ) > 0 , HYPERLINK("/apex/Apttus_QPConfig__ProposalConfiguration?id=" &Id, IMAGE("/resource/Apttus_QPConfig__Button_Configure", "Configure Products"), "_self"), NULL)
```

3. Copy that formula code and return to the **Custom Fields & Relationships** and click **New** to display the New Custom Field page.
4. Select **Formula** and click **Next**.
5. Enter a **Field Label** and **Field Name**, select **Text** and click **Next**.
6. Paste the formula code copied in Step 3 into the text field and add the formula to use Deal Maximizer.

```
&"&useDealOptimizer=true"
```

The complete code would look like this.

```
IF ( LEN( Apttus_QPConfig__PriceListId__c ) > 0 , HYPERLINK("/apex/Apttus_QPConfig__ProposalConfiguration?id=" &Id&"&flow=Default&UseDealOptimizer=true" , IMAGE("/resource/Apttus_QPConfig__Button_Configure", "Configure Products"), "_self"), NULL)
```

7. Click **Next** and select which profiles can access the formula and click **Next**.
8. Select which page layouts the formula field will be automatically added to and click **Save**. The Configure button is now available on the selected Quote/Proposal pages and can be used to launch production configuration and display a shopping cart that will have the **Analyze Deal** button available.

The formula above uses the default flow. You can change the flow to NGDefault for angular based UI. You can edit the page layouts to display the Configuration action in the

desired location on the page and also remove any existing configuration action you no longer need.

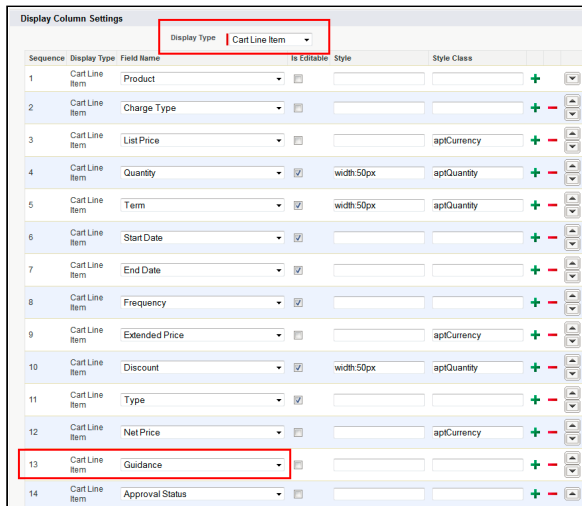
## Integrate Deal Guidance into the Shopping Cart

1. Go to **Setup > App Setup > Develop > Custom Settings** and click **Manage** for Config Custom Classes.
2. Click **Edit** for Custom Classes.
3. In the Deal Maximizer Callback Class enter *Apttus\_CPQOpti.DealMaximizerCallback*.
4. Click **Save**. Deal guidance information can now be displayed in the shopping cart when it is available.

You can now configure color bands, dimensions, dimension sets, and deal guidance rules.

## Adding Deal Guidance Column to the Shopping Cart

1. Click the All Tabs icon (+) and select **Config Settings**.
2. Select **Display Column Settings**.
3. From the **Display Type** list, select **Cart Line Item**.
4. Add a new line and select **Guidance** for the **Field Name** or change an existing line.



5. Click **Save**. The Guidance column is available in the Shopping Cart.

## Adding Analyze Deal Action to the Cart

1. Click the All Tabs icon (+) and select **Config Settings**.

2. Select **Display Action Settings**.
3. From the **Display Type** list, select **Cart Page**.
4. Add a new action **Analyze Deal** and select **Display As Action**.

Custom Settings  
Config Custom Display Actions Edit

Save Cancel Load Default Classic Settings Load Default Angular Settings

Display Action Settings

Display Type: **Cart Page**

Flow: **Default**

Sequence	Display Type	Flow	Action	Action Label Name	Display As	Action Area	Action Style Class	Action Page	Behavior	Action Type	Is Enabled	Always
1	Cart Line Item	Default	Add More Products	AddMoreProducts	Action	Center					<input checked="" type="checkbox"/>	
2	Cart Line Item	Default	Installed Products	InstalledProducts	Action	Center					<input checked="" type="checkbox"/>	
3	Cart Line Item	Default	Add Miscellaneous Item	AddMiscellaneousItem	Action	Center					<input checked="" type="checkbox"/>	
4	Cart Line Item	Default	Back to Pricing	BackToPricing	Action	Center					<input checked="" type="checkbox"/>	
5	Cart Line Item	Default	Reprice	Reprice	Action	Center					<input checked="" type="checkbox"/>	
11	Cart Line Item	Default	Edit Price Agreement	EditPriceAgreement	Action	Center					<input checked="" type="checkbox"/>	
12	Cart Line Item	Default	Analyze Deal	AnalyzeDeal	Action	Center					<input checked="" type="checkbox"/>	
13	Cart Line Item	Default	Analyze Quote	AnalyzeQuote	Action	Center					<input checked="" type="checkbox"/>	

5. Click **Save**. The action button is available in the cart.


# Setting Up Deals

You must complete the post-installation configuration first and then set up the colors, dimensions, and guidance rules. When initially configuring Deal Maximizer and Deal Manager modules you must complete the tasks in the order below, as there are dependencies between the objects. Once the objects are all in place and you are using Deal Maximizer, the order in which you modify or add new objects is not as important.

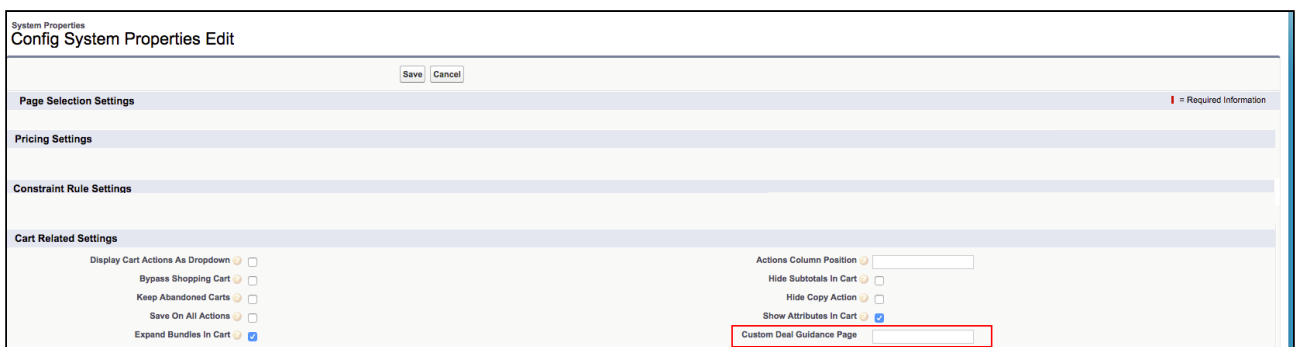
- Define Custom Measure
- Define Color Bands and Shapes
- Define Deal Guidance Dimensions
- Define Deal Guidance Dimension Sets
- Define Deal Guidance Rules

## Customize Deal Guidance Layout

To accommodate custom-built content with a custom layout for deals, you can create a custom page . To view the custom page, you need to provide the custom page URL under **Config Settings**.

From the Object header, click  and search for **Config Settings**. Click **System Properties** to edit the configurations. Under **Cart Related Settings**, enter the custom page URL in the **Custom Deal Guidance Page**.

For example, enter *https://na34.visual.force.com/apex/MyCustomDealGuidancePage* for a custom page named *MyCustomDealGuidancePage*.



For a selected Quote/Proposal Line Item, you can 'Preview' the custom Deal guidance interface and activate the custom page if the preview is satisfactory.

## Define Custom Measure

Sales rep while negotiating the pricing terms aim to optimize variables affecting pricing and ensure that deals are winning proposals for the organization. Measures are interdependent variables that determine pricing. An organization can have its own measure that drives pricing guidance. For example, one organization might need guidance on a permissible range of Annual Price per unit and the other on Margin percentage. Different organizations also have custom calculations for fields they would like to use for analyzing deals. Apttus Deal Guidance offer a pre-defined set of measures:

- UnitPrice
- NetPrice
- Annual Price Per Unit
- Discount%
- Discount Amount
- Margin%

Please refer the section [Rule Measure Formulas](#) to check out formulas for each of the measures.

Apart from these standard measures, you can define a **Custom** measure which is the pricing variable of your choice. The **Custom** measure is applicable at the header level and the line item level because Deal guidance works at the Quote header level. Once you define a custom measure, the sales representative should see the deal guidance based on this custom measure.

### **Note**

If you have upgraded the Deal Maximizer package, you must add the value **Custom** to the **Measure** picklist field on the **Deal Guidance Rules** object. For a new installation, this value is already available in the **Measure** picklist. Refer [Configuration for Deal Guidance Rules](#) for details.

## Using a Custom Measure

Let us take an example to understand how you can create a Custom Measure for one of the requirements. As a Sales Representative, you want to get guidance on a permissible range of Margin for each deal. The formula to calculate Margin for your requirement differs from the out-of-box formula of Margin%  $((\text{NetPrice} - \text{ExtendedCost}) / \text{NetPrice})$ .

## Procedure:

1. On the **Line Item**, add a new custom formula field for margin. Let's call it **Custom Margin**. Provide the formula so that the deal guidance rule drives on the basis of this Custom Margin field. You can add a Custom field for guidance at either the Line item level or the Deal level.
2. Create a new Deal Guidance rule and provide the Guidance Rule Entries

Sequence	Quantity Dimension	Good	Average	Acceptable	Low
1	100	5	10	12	20
2	300	10	12	15	30
3	500	12	15	17	40

3. On the cart page, you can see the Deal Guidance pop-up for the **Quantity** field.

## Define Color Bands and Shapes

Color bands are used to provide a visual indication of the potential quality of a deal and are associated with guidance rules. You can use different combinations of colors and shapes to define the color bands. A color or a shape on its own does not have any value, but they serve as the framework for building your deal rating range with guidance rules.







 Only one global color band structure can be set up for your entire org.

The following six colors and six shapes available in the org by default.

Deal Color	Default Hexadecimal Code
Green	#387C35
Light Green	#90EE90
Yellow	#F7FE2E
Orange	#E36F1E
Red	#B2102C
Black Blue	#0000A0

You can change the colors by modifying the color code of an existing Deal Color while defining the Deal Color Band. If you change the value of the color code the name of the Deal Color is not changed. You can also add a new Deal Color in the picklist in the Deal Color Band object. The custom value you add in the picklist is not associated with any color code, you must manually enter the hexadecimal value while defining the Deal Color Band. You must ensure that the Hexadecimal values are accurate. Otherwise, the color defaults to Black.

The color of the shape changes according to the Deal Color you define. You can select from the following shapes.

Name	Shape
Circle	
Triangle	
Diamond	
Square	
Pentagon	
Star	

You can associate the same shape to multiple colors. However, that is not ideal, as it reduces the element of distinction between deals. That can make it difficult for the Sales rep to use the feature effectively. You can create a maximum of 6 Deal Bands.

When you go to the Deal Color Bands page, you will note that while there are listings for each color band with corresponding **Edit** buttons, the links all go to the same Color Bands Edit page regardless of which one you select.

Once you have initially set up your color bands and have begun using them, any subsequent changes will impact guidance rules that are being used in your live environment.

## To define color bands

1. Go to the **Deal Setup Console** and select **Add Deal Color Bands**.

2. Enter a name for the band in **Band Name**.
3. Select a **Deal Color**.
4. In the **Color Code** field, use the default value or enter your own hexadecimal color code value.

i A custom Deal Color is not associated with a Hexadecimal value. You must find a hexadecimal value for colors on the internet and enter the value manually in the **Color Code** field.

5. Select a shape in **Deal Shape**
6. Enter a Description if necessary.
7. Click + to enter another band  
- or -  
Click **Save**.

Deal Color Band Edit						
Sequence	Band Name	Deal Color	Color Code	Deal Shape	Description	
1	Target	Green	#387C35	Circle	A perfect Deal	
2	Acceptance	Light Green	#90EE90	Triangle	An acceptable deal	-
3	Good	Yellow	#FFE512	Diamond	A good deal	-
4	Average	Orange	#E36F1E	Square	An average deal	-
5	Below Average	Red	#B2102C	Pentagon	A below Average deal	-
6	Not Good	Black Blue	#0000A0	Star	Non-acceptable deal	-


The color bands are saved and now available to be used in setting up deal guidance rules. Create the remaining objects required for deals, such as dimensions, dimension sets, and deal guidance rules.

## Define Deal Guidance Dimensions

Dimensions are used to populate Dimension Sets, which are subsequently used by Guidance Rules.

Dimensions can be attributes of products, quotes, quote line items, deals, and deal line items. Dimensions enable you to set the criteria which will be used to judge the quality of a deal.



 By default, out of the box, Line Item and Product Configuration are supported. To enable Deal Maximizer for other objects, customers should contact professional services.

To define deal guidance dimensions

1. Go to the **Deal Setup Console** and select **Add Deal Guidance Dimension**.
2. Enter the following details and click **Save** or click **Save & Renew** to repeat this task.

Field	Description
Dimension Name	Provide a descriptive, unique name for the dimension.
Business Object	Select the object you plan to use the deal guidance for. This impacts which fields are displayed in the Field list, as they will relate to this object. You can select from: <ul style="list-style-type: none"> <li>• Line Item - This is the line items for the product configuration.</li> <li>• Product Configuration - This is the Configurations related list object on the Quote/Proposal record.</li> </ul>
Dimension Type	Select whether you want to use a single field from the Business Object record or a formula: <ul style="list-style-type: none"> <li>• Field - this will load the Field list with all of the fields for the selected Business Object.</li> <li>• Formula - this will turn the Field list into a text area for entering a formula.</li> </ul>
Field	If you selected Field Dimension Type, this list will contain all of the fields for the selected Business Object. It only includes header level fields. Related list fields are not included. If you selected Formula Dimension Type, you must enter in a valid formula using the fields from the selected Business Object. The formula can be a maximum of 255 characters including spaces.
Description	Type a brief description. This is an optional field. Click Save. The dimension is now available for inclusion in a Dimension Set.

Create a dimension set and make use of the newly created dimensions. You can Clone the Dimension, which will display a new Edit page with the dimension options pre-populated with the values from the cloned Dimension. If you want to edit the Dimension later, you must ensure it is not being used by a rule, as you cannot edit dimensions that are in use.

## Define Deal Guidance Dimension Sets

Dimension Sets enable you to group together Dimensions for use with Deal Guidance Rules. By grouping together dimensions and selecting the appropriate input type, you are setting up how they will be displayed when creating guidance rules and how values should be entered for them.

### To define deal guidance dimension sets

1. Go to the **Deal Setup Console** and select **Add Deal Guidance Dimension Set**.
2. In the Information section enter the following details:

Field	Description
Set Name	Provide a descriptive, unique name for the dimension.
Guidance Type	Select one of the following, which controls which values are available in the Business Object list:  Deal Level - this means the guidance will be based on a field at the object level. For instance it will be the total value of a quote or deal that is judged, not a specific line item that makes up part of the overall object value.  Line Level - this means the guidance will be based on a field at the line item level.
Business Object	The values available here are dependent on the selected Guidance Type. This should match the object you plan to use the deal guidance for.
Description	Type a brief description. This is an optional field.

3. In the Deal Guidance Rule Entries section you must add at least one Dimension by completing the following. The Dimensions reference the specific object fields which will be used for evaluating the quality of the deal:

Field	Description
Dimension Name	Provide a descriptive, unique name for the dimension, that describes the Dimension you select from the Dimension list.
Dimension	Select the Dimension.
Input Type	Select Discrete if you want to use a specific value, such as Belgium or Ireland. Select Range if you want to be able to use a value range, such as a number between 100 and 499.

You can click **+** to add more dimensions if required.

4. Click **Save** or click **Save & Renew** to repeat the task. A dimension set is created that can be used with a rule.

You should create a guidance rule to use the dimension set with.

## Define Deal Guidance Rules

Guidance rules bring together all of the other objects you configured (color bands, dimensions, dimension sets) into a rule that determines when an object record or line item should be evaluated as a deal.

You can define thousands of rules and rule entries. For example, 5000+ rules with approximately 10 rule entries in each rule can be made available in your org. A single query can give the output of up to 1000+ rule entries which are successfully applied into the cart.

However, the restricted limit for the seamless execution of the cart page is 1000 rule entries per cart. If you have given some advanced criteria and scope for the rule entries and the limit of 1000 rule entries per cart is reached, then the pricing process on the cart page may degrade performance and may display an error message. You must reduce the number of rules or narrow down the defined scope to avoid performance degradation and errors.

The rules are associated with the Product Groups and the Product Families. Each Product Group and the Product Family has 10-15 products within it.

## To define deal guidance rules

1. Go to the Deal Setup Console and select Add Deal Guidance Rule.
2. In the Information section, complete the following:

Field Name	Description
<b>Rule Name</b>	Provide a descriptive, unique name for the dimension.
<b>Sequence</b>	This is the order in which Deal Maximizer will check the Guidance Rules when a deal is evaluated. If multiple rules match the criteria on the object, then the rule with the lowest sequence number will be used.
<b>Guidance Type</b>	Select one of the following, which controls which values are available in the Business Object and Measure list:  <b>Deal Level</b> - this means the guidance will be based on a field at the object level. For instance, it will be the total value of a quote or deal that is judged, not a specific line item that makes up part of the overall object value.  <b>Line Level</b> - this means the guidance will be based on a field at the line item level.
<b>Business Object</b>	The values available here are dependent on the selected Guidance Type. This should match the object you plan to use the deal guidance for.
<b>Dimension Set</b>	Select the Dimension Set the rule will use to evaluate the quality of the deal. The available options are dependent on the Business Object and Guidance Type.
<b>Measure</b>	It is a variable that participates in pricing during the quote process. You can choose any one of the pricing fields such as Unit Price, Net Price, Annual Price, Discount Percentage, Discount Amount or Margin Percentage as Measure. See <a href="#">Rule Measure Formulas</a> for more details.

Field Name	Description
Custom Measure Source	<p>The pre-defined set of Measures come with a pre-defined formula. If you have a custom pricing variable and want to leverage this variable to drive deal guidance, you can do so with the help of Custom Measures. This field is visible only if <b>Measure</b> is set to <i>Custom</i>. All fields from the selected Business object are listed here. You can choose any field and define guidance rules for it.</p> <p>When using custom measure for deal guidance, it is expected that the deal guidance popup content is also custom. Out-of-the-box display of deal guidance content will not provide any meaningful information when deal guidance is based on the custom measure.</p>
Custom Measure Band Direction	<p>Set the guidance in a specific direction - Highlow orLowhigh.</p> <p>Based on your Custom Measure, you can classify the band values from either high-to-low or low-to-high. For example, if your Custom Measure is a <b>Margin</b>, the direction <i>hightolow</i> would signify that higher the margin, better the deal. On the other hand, if your Custom Measure is a <b>Discount</b>, the direction <i>lowhigh</i> would signify that lower the discount, better the deal.</p> <p>This field is visible only if <b>Measure</b> is set to <i>Custom</i>. See the example <a href="#">below</a>.</p>
Currency Scope	Select the relevant currency from the Available box and move to the Chosen box.
Active	This must be selected for the rule to be available for use. Note: You should not activate the rule until it has been fully configured.
Description	Type a brief description. This is an optional field.

 **Note**

You can add custom fields on the Deal Guidance Rule which will help you identify the constraint rule triggered for a line item. Access **Deal Guidance Rule** object and create a custom field of any datatype. Add this field to the Deal Guidance Rule Layout and provide a value for it.

3. In the **Rule Scope** section, you can apply additional filters based on the Product family, Product Group, Service Location, Product and Account. You can see this section only if the **Guidance Type** is set to *Line Level*.
4. In the **Rule Criteria** section, create an equation for a field (dependent on which Business Object is used) that you want to use to filter which deals the rule could be applied to. You can include up to ten fields in the criteria. Since the equations are by default linked by AND, all equations must be true for the overall expression to evaluate as true. For extending the scope of a Rule Criteria you can apply **Advanced Filter conditions**. You can use AND & OR operators to combine the rule parameters to get the desired results.
5. In the **Rule Entries** section, the dimensions that are associated with the dimension set selected earlier are displayed here. You must enter the values for the dimensions and the rating values you want to correspond to the color bands.
6. Click **Save**. Once saved and made active, the guidance rule is available for use.

### Deal Guidance Rule Detail

Rule Name	Rule_Demo
Sequence	1
Guidance Type	Line Level
Business Object	Line Item
Dimension Set	ND_DS1
Measure	% Discount
Currency Scope	All
Initial Rows	2
Active	<input checked="" type="checkbox"/>
Description	Rule prepared for demo.

#### Rule Scope

Service Location Scope	All
Product Family Scope	All
Product Group Scope	All
Product Scope	All
Account Scope	All

#### Rule Criteria

#### Deal Guidance Rule Entries

Sequence	ND_Dimension1	Target	Acceptance	Good	Average	Below Average	Not Good
1	10	5	10	15	20	25	99999
2	20	10	15	20	25	30	99999

You can edit the rule as required, as well as clone it. You must deactivate a rule before you can delete it.

### **Use Case 1: Deal Guidance Rule for Band Direction**

Band Direction - Low to High

Let us assume that the Measure = %Discount

You must specify all bands in the Deal guidance Rule set.

Quantity	Preferred	Acceptable	Not Acceptable	Risky
10	10	20	30	50

Since lower Discounts will make a profitable deal, the Band Direction *LowtoHigh* indicates that lower discounts are preferable and higher discounts are risky.

Band Direction - High to Low

Let us assume that the Custom Measure is set to **Margin%**. You can define the range for this custom measure as given in the table below.

Quantity	Preferred	Acceptable	Not Acceptable	Risky
10	100	90	70	60

Since higher Margin% will make a profitable deal, the Band Direction *HightoLow* indicates that higher margins are preferable and lower margins are risky.

### **Use Case 2: Setting Deal Guidance Rules**

#### **Admin Setup:**

- There are different product families available in the Org such as:
  - Product Family A, Product Family B, Product Family C and so on.
- Each product family has 10-15 products within it and maximum 15 rules associated with each product family.
  - Product Family A has 13 products
  - Product Family B has 15 products
  - Product Family C has 12 products

And so on. With the above setup, your org may have thousands of rule entries.

#### **Sales Rep User Runtime:**

- One rule is applied to one product at the same time and maximum 10 rule entries are associated with each rule. Therefore, each product that you add or configure into the cart has 10 rule entries associated.
- Now, the sales rep creates the proposal and configures the cart.
  - Adds 100 products from the different product families, so there are 100 rules applied into the cart.
  - Therefore,  $100 \times 10 = 1000$  total rule entries are applied to the cart seamlessly.

But if the number of products and/or rules are increased, that lead to the increased number of rule entries into the cart, then the CPQ displays an error message.

## Guidance for Custom Measure

When the Deal Guidance is based on a Custom Measure and is applicable at the Deal Level (Guidance Type), you need to provide custom content for the Deal Guidance pop-up. From the cart, you can click **Analyze Deal** button to see the Deal guidance for your Custom Measure. In the following screen, you can see that the **Analyze Deal** page provides the Deal Rating for the **Margin%** measure.



The screenshot shows the Deal Maximizer interface. At the top, there are buttons for 'Return to Cart' and 'Update'. Below that, the 'Deal Information' section displays the Deal Name 'Deal for PC - Hudrath Khan 01 GenePoint' and the Related Opportunity 'GenePoint Lab Generators'. The 'Product Details' section contains a table with columns: Totals, Quantity, Charge Type, Frequency, List Price, Extended List Price, Extended Rollup Price, Net Price, Additional Discount, and Guidance. The 'Deal Rating' section shows 'Current Deal Margin Percent is 8%' and a table with columns: Rating, From, Margin Percent, To, From, Net Price, To. The 'Critical' rating is highlighted with a red border.

Rating	From	Margin Percent	To	From	Net Price	To
Preferred		100.00%	100.00%		\$32,000.00	
Typical	100.00%		10.00%	\$32,000.00		\$17,600.00
Critical	10.00%		5.00%	\$17,600.00		\$16,800.00

You can see that the Column Label for 'From' and 'To' values show the Custom Measure which is **Margin percent** in this case.

## Rule Measure Formulas

These are the formulas that are used when you are selecting a value for the Measure option when creating a deal guidance rule.

Measure	Line Item Level	Quote Header Level
Unit Price	$\text{NetPricePerUnit} (\text{NetPrice} / \text{Selling Term} / \text{Qty})$	N/A
New Price	N/A	NetPrice
Annual Price Per Unit	$\text{NetPriceAnnual} ((\text{NetPricePerUnit}) * 12)$	N/A
Discount %	$((\text{ExtendedPrice} - \text{NetPrice}) / \text{ExtendedPrice} * 100)$	$((\text{ExtendedPrice} - \text{NetPrice}) / \text{ExtendedPrice} * 100)$
Discount Amount	$(\text{ListPrice or BasePrice}) - \text{NetPricePerUnit}$	$(\text{ExtendedPrice} - \text{NetPrice})$
Margin %	$((\text{NetPrice} - \text{ExtendedCost}) / \text{NetPrice}) * 100$	$((\text{NetPrice} - \text{ExtendedCost}) / \text{NetPrice}) * 100$
Custom		

 **Note**

Select **Custom** Measure to drive Deal guidance by the measure of your own choice based on a Business object. For more information, please refer [Define Custom Measure](#).

# 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.
Dimension Members	Dimensions that form a part of a Dimension Set. For example, Quantity on the Line Item can be a dimension, and can be used to match a specific cart line with the rule entry based on the Quantity associated with the Line Item.
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.
Dimensions	Dimension is a field in one of the Business Objects used to arrive at the pricing guidance. For example, Terms on Cart Line Item can be a Dimension, and it can be used to identify matching Deal Guidance Rules to evaluate for a given cart line item.
Dimension Sets	Used to group Dimensions for use with Deal Guidance Rules.
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 find the appropriate rule entry that matches with the given cart line item or the deal.
Hexadecimal Codes	Color code that is used to represent the color bands. Only those colors that are available out of the box should be used.
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.

Term	Description
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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