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Customization Guide - SAP CPQ - Callidus

Version

This article was created using the 2011 version of SAP CPQ Former (Callidus)

Brief Description

During a quote most of the time, it's necessary to concede discounts or promotions for our Customer. It's the basic line of a Sales Representative.

This document has the objective to describe how to introduce the Promotions and Special Discounts into Quote process considering the solution SAP CPQ - Callidus.

I hope you enjoy it!!

Author

I started my career in 1992, working with corporative solutions in mining companies. In 1999, I changed my professional perspective and started my first project in CRM business, using Vantive in Telecom Industries, which I spent 8 years working as CRM Telecom Solution Architect.

Then, in 2006 I was invited to work on my first project as SAP CRM Functional Consultant in Utilities. I have plenty of experience in different modules and submodules inside of SAP CRM. I am an expert in the Interaction Center, Sales, Services, Marketing, and ERP Integrations.

Besides the baseline of SAP CRM, I had the opportunity to work in a different line of business, as Goods, Trade Promotion, Media, Call Center, Mining, Utilities, Heavy Machinery.

With the SAP Cloud technologies, I've become an expert in Cloud solutions and Customer Experience using the platform C4hana (C4Sales, C4Services, Marketing, Qualtrics, CDC/Gigya, CPQ/Callidus).

During those projects, the integration with SAP ERP (ECC and S4hana) became obligatory and the understanding of the integration between S4hana and C4hana was extremely necessary to adequate the CX process and ERP process.

Considering the integration between SAP C4hana and S4hana. It became so necessary, then I concentrate my energy to understand how it works. Today I am an expert in integrating SAP C4hana and S4hana using SAP Cloud Platform Integration.

Below I will describe all points of my carrer and just in case you have doubts about any points, please let me know.

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1. Article

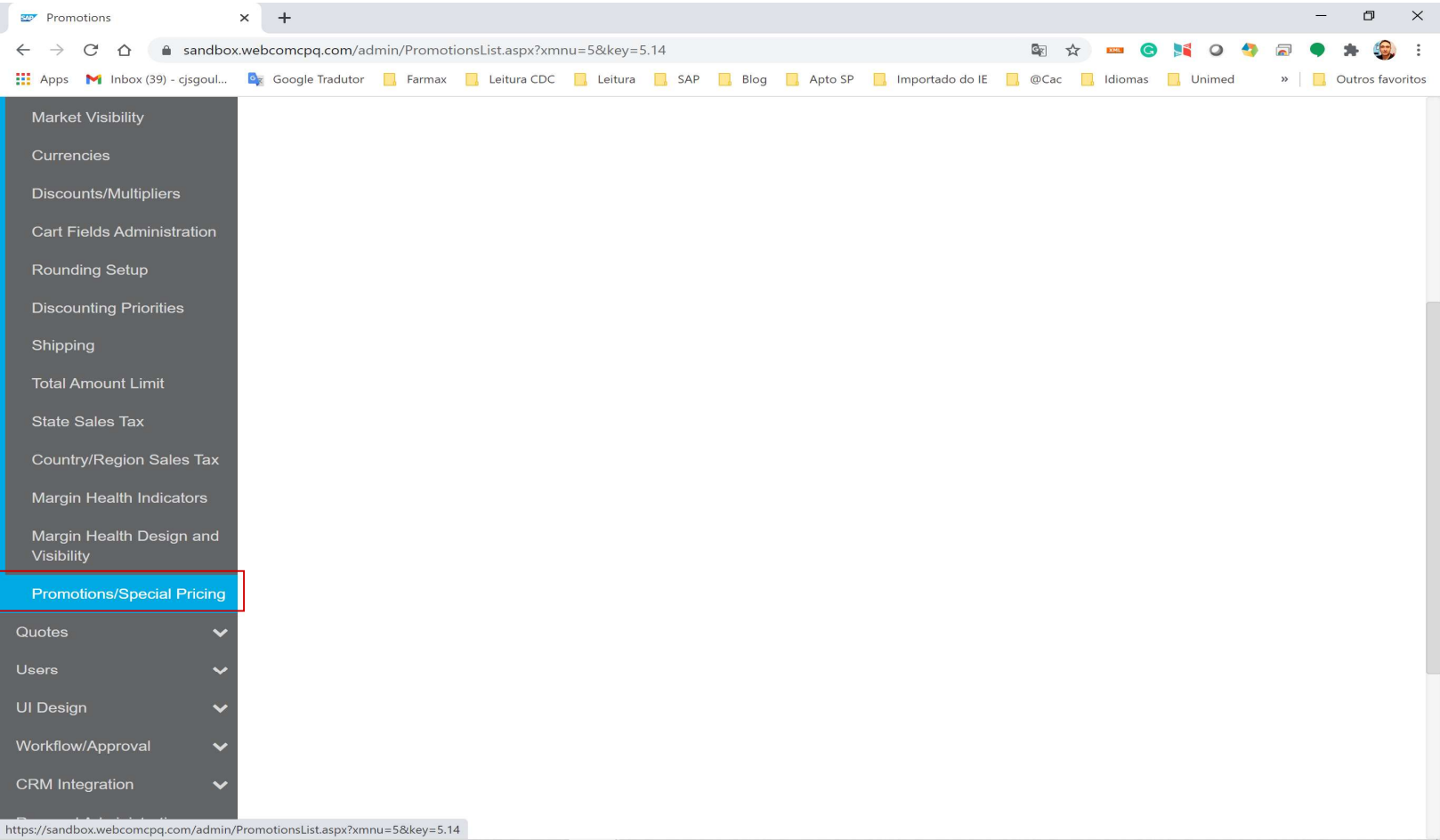
1.1. Description

During a Quote, the Sales Representative needs to persuade his Customer with Offers. That's the point of this document, create a sales process capable to suggest promotions and discounts. The SAP CPQ is the best solution to accomplish this goal. Into SAP CPQ, is possible to define discounts based in Products, Type of Product and Categories. Also, it is possible to assign that promotion to a group of Users, Roles and Companies.

Let's do it!! I hope you enjoy this document.

1.2. Configuring the Promotion

Into the SAP CPQ I will define a promotion clicking the link "**Promotions/Special Pricing**".



Then, it will list all promotions created so far. Into our environment, there is no promotion so far. Then, I will create a new one clicking into the button "**Add New**".

A screenshot of the 'Promotions' page in the SAP CPQ Admin interface. At the top, there's a header bar with the title 'Promotions'. Below it, a language selection dropdown is set to 'US English'. A blue 'Add New' button is prominently displayed and highlighted with a red rectangular box. Below the button is a search bar and a table header with columns: ID, Name, Rank, Start Date, End Date, User, and User Type. The table body is empty, with the text 'There are no items.' displayed. At the bottom left, a box shows 'Number of items: 0'. At the bottom right, there's a 'Items per page:' dropdown menu currently set to '10'.

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Now, I will define the header of this promotion, which involve the following fields:

- a) ID
Id of your promotion
- b) Name
Type the name
- c) Start Date and End Date
Those fields mark the start and the end of your promotion
- d) Description
A brief description of your promotion
- e) Suggest Up-Sell in Quote
Show the available promotions to your Customer

The field “**Suggest Up-Sell in Quote**” is quite interesting because exhibit the promotions activate to your Customer during the quotation.

Promotions/Special Pricing » Edit of

Definition

Pricing Details

Scripts

* Promotion

Type:

☒ Pricing Details ⓘ

☐ Scripts ⓘ

* ID:

1

* Name:

Promotion Double car

* Rank:

10

Active:

☒

Suggest Up-sell in quote:

☒ Yes

☐ No

Start Date:

12/01/20

End Date:

12/31/20

Subsequent rank override:

☐ ⓘ

Catalog Description:

Promotion Double car

Quote Header Description:

Promotion Double car

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The step 1 of this configuration defines who will have the access of this promotion. The following objects can be configured out of the box:

- a) Users
If you want to specify a group of users that's ok.
- b) User Type
User Type are the roles (Sales Rep, Manager, etc)
- c) Company
This object represents the company related with a group of users

The step 2 of this configuration defines a condition more complex, considering Quote's fields and much more. I will talk about this powerful tool in another document. For this approach, I will only put 1 (True) to execute to every Quote created into our Solution.

Step 1

Select users that the promotion will be applied to when condition below is TRUE (equal to 1).

User:

Select

Clear

User Type:

Select

Clear

Company:

Select

Clear

Step 2

Enter a condition under which the promotion will be applied to the above selected users.

* Condition:

1

Save

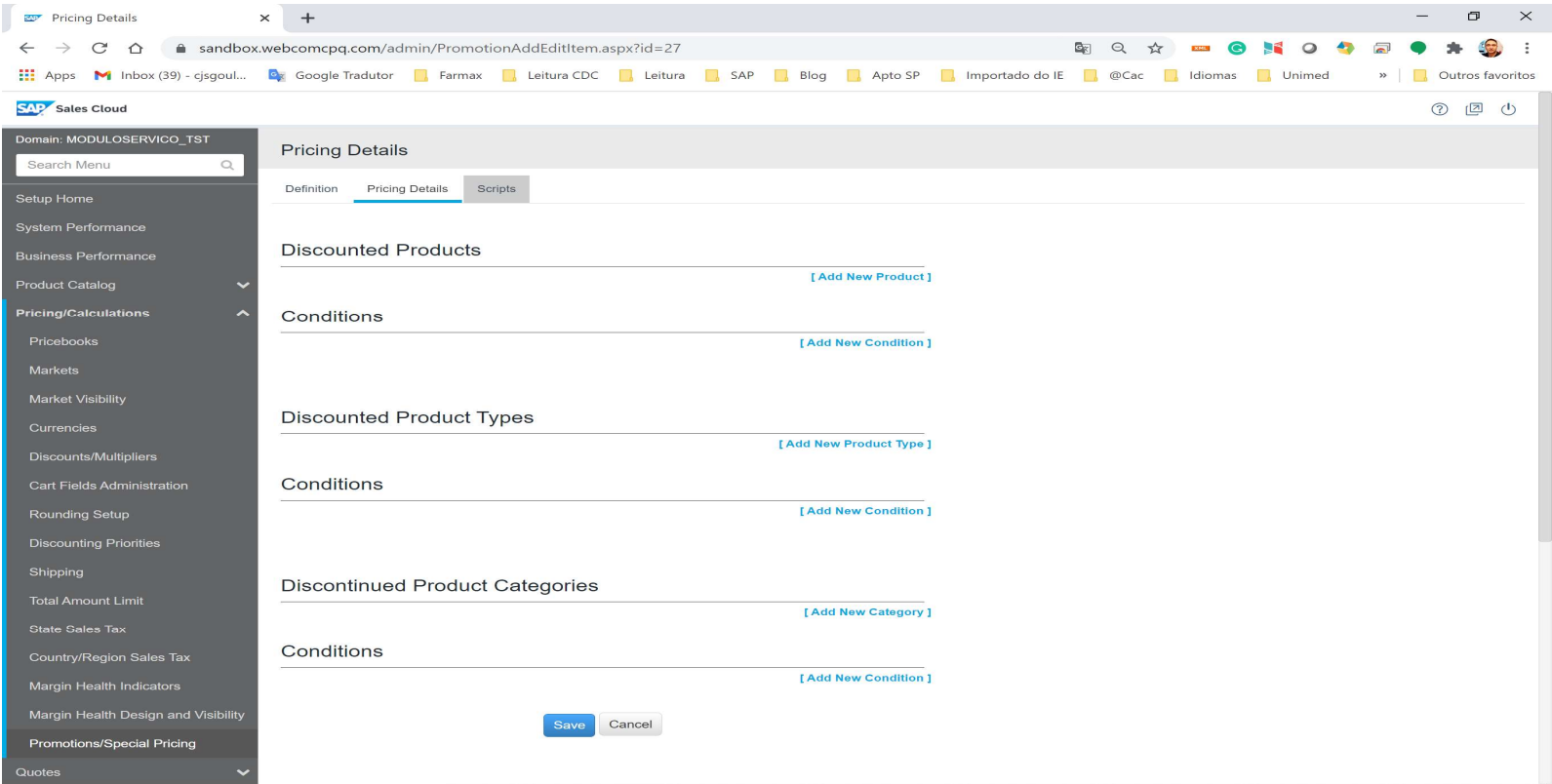
Cancel

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1.3. Defining the Pricing Details

The second part of our configuration is the “Pricing Details”. This tab defines the objects of our promotion.

- a) Products
Specific products will participate of this promotion
- b) Product Types
This object considers all products which belong to this Product Type
- c) Product Categories
This object considers all products which belong to this Category



For this configuration, I will choose the car “Jetta”. Then, I will click into the link “Choose Product”

Pricing Details

Definition

Pricing Details

Scripts

Discounted Products

Discounted Product (Select By Name And/Or Part Number)

Name:

[Choose Product]

Part Number:

Calculation

Type:

All Items Same

Loop:

Total Allowed Uses

Quantity Breaks

Modification Type:

Modification Value:

QTY From:

QTY To:

Discount Per

0

[Delete Product]

[Add New Quantity Break]

[Add New Product]

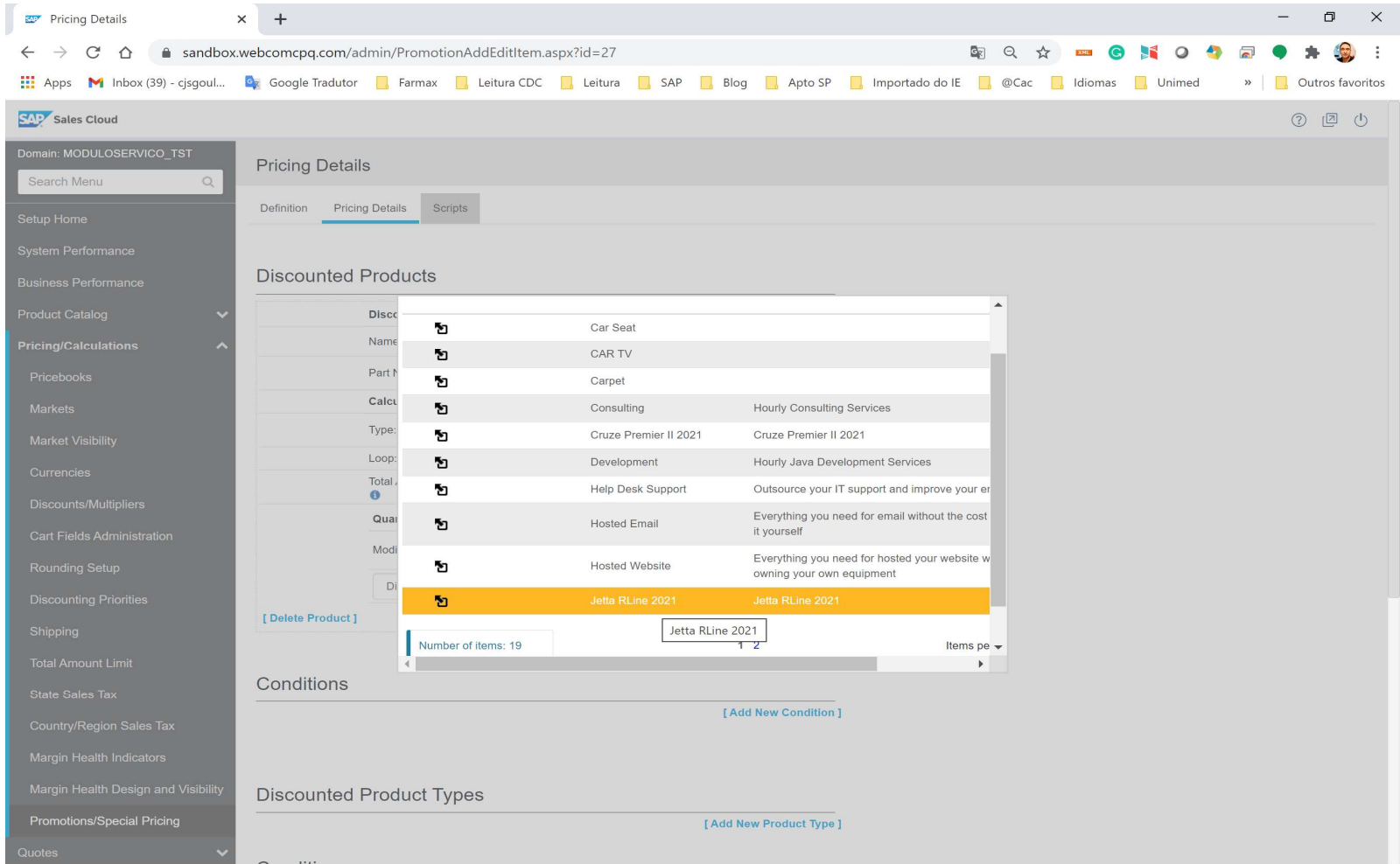
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Now, I will look for and choose the **"Jetta Rline 2021"**



Now, I will define 20% discount if the customer buys more than 1 car

Discounted Products

Discounted Product (Select By Name And/OR Part Number)

Name: Jetta RLine 2021

Part Number:

Calculation

Type: i All Items Same ▼

Loop: i ☐

Total Allowed Uses: i

Quantity Breaks

Modification Type: Modification Value: QTY From: QTY To:

Discount Per ▼ 20 2 99

✕

[\[Delete Product \]](#)

[\[Add New Quantity Break \]](#)

[\[Add New Product \]](#)

Conditions

Product / Product Type / Category (Select By Name And/Or Part Number)

Jetta RLine 2021

Name

[Choose Product Type]

[Choose Category]

Part Number:

Condition

Minimum QTY

2

[Delete Condition]

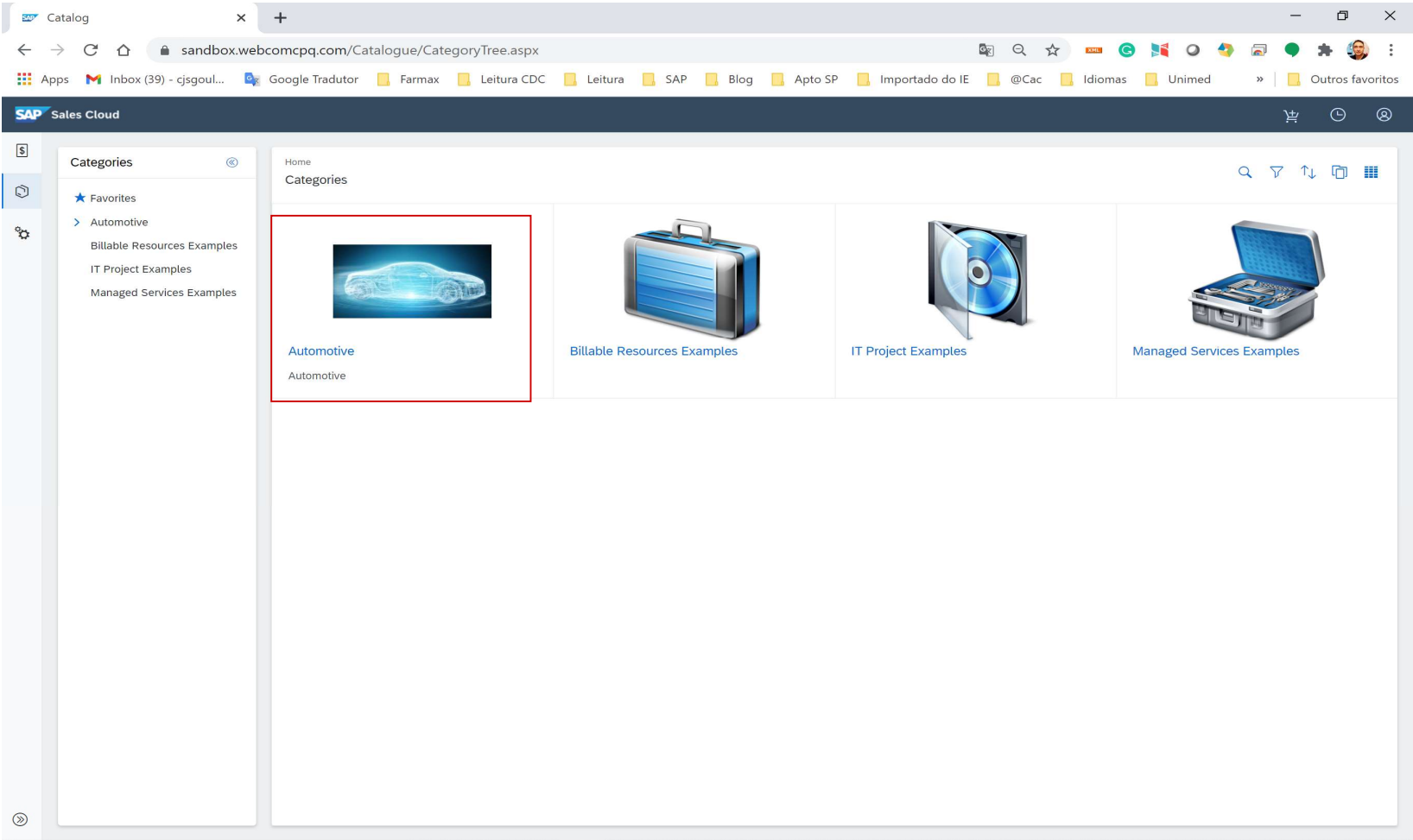
[Add New Condition]

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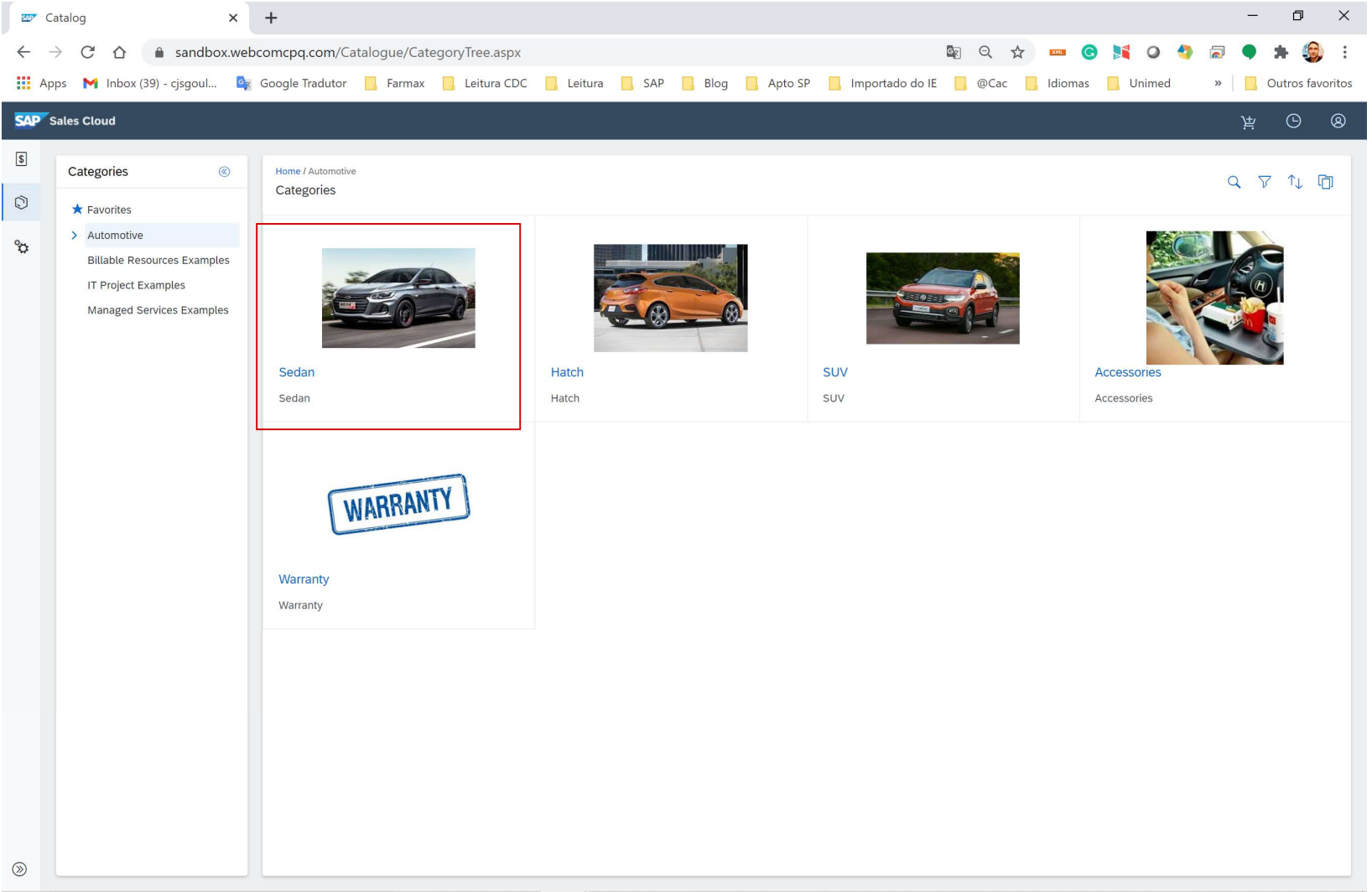
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1.4. Testing the Promotion

Now, it's my favorite moment. Let's test our configuration. Then, click into the category "**Automotive**"



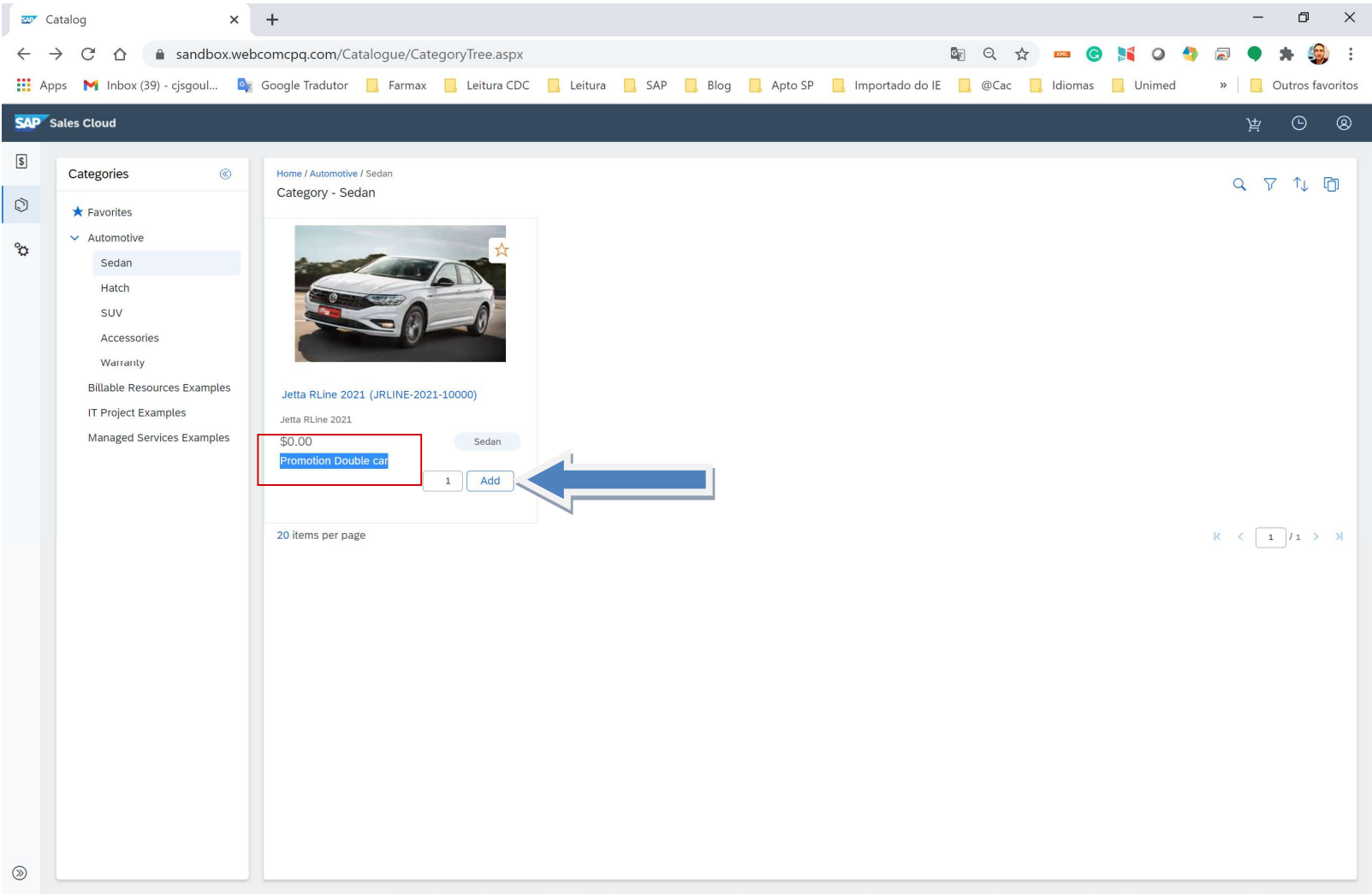
Now, choose the Sub-Category "**Sedan**" below



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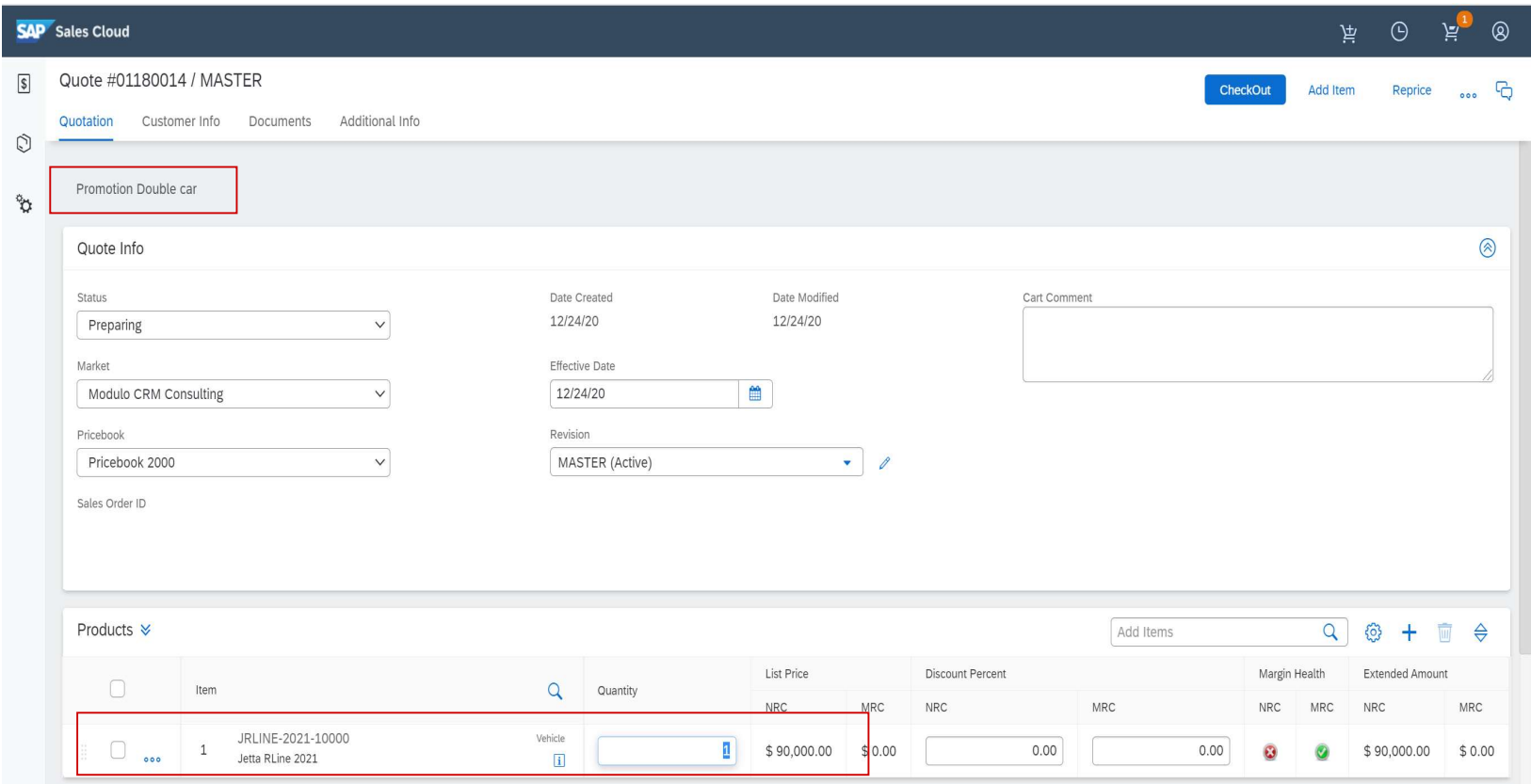
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Then, Jetta is exhibit informing the promotion activated to this car. Click the button Add



Choosing the Product, the system automatically redirects the user to the Quote. Check this out!! The product chosen already added and the pricing of **90.000 US\$** was defined. Our promotion “**Promotion Double Car**” is exhibit into the Quote’s header. However, it was applied to our Quote.

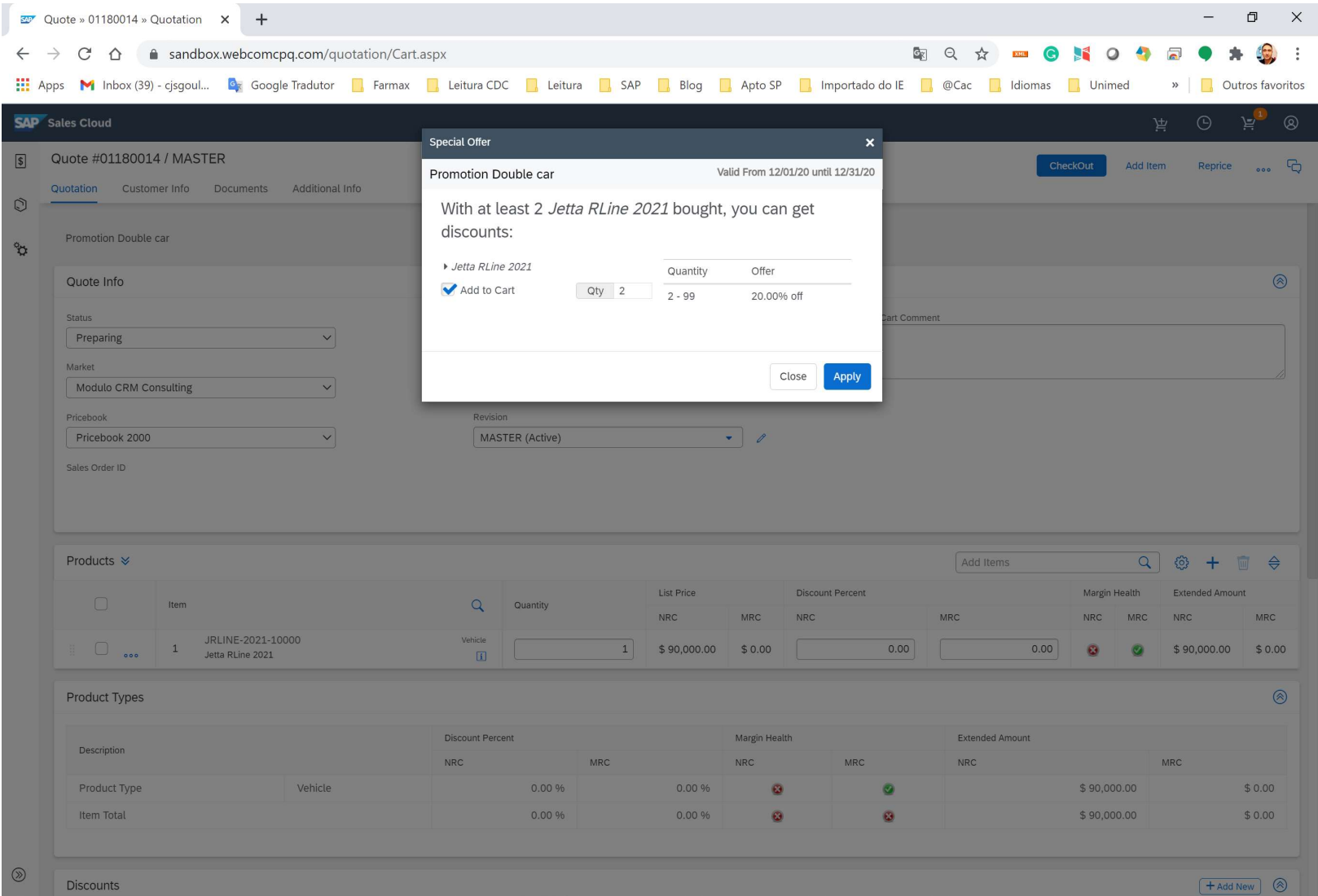
Then, if the user clicks into the link “Promotion Double Car” a screen appears with the offers.



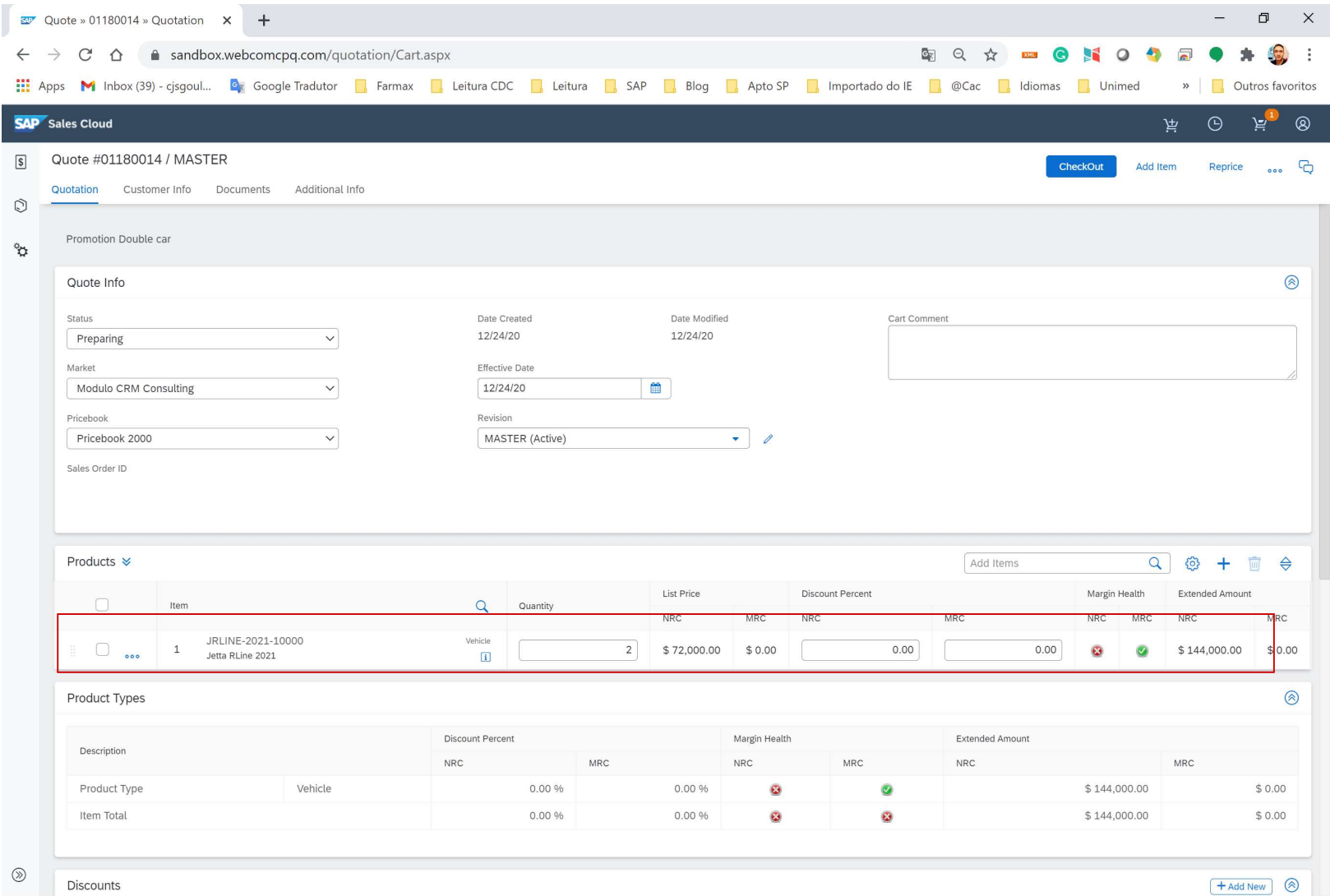
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Clicking into the promotion, are listed all promotions available to the customer. Our promotion informs to the user if the customer buy at least 2 cars you will have 20% off. I will not miss that promotion, I want 2 Jettas !!



Applying this promotion to our customer, the system gives to the customer 20% discount of this incredible car. Then the price of Jetta will be US\$ 72.000. Cool Isn't it !!



SAP Sales Cloud CPQ is an amazing solution for Quote, I hope you enjoy it!!