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Version

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

Brief Description

During the sales process is impossible to create a Quote without a tax rate, unfortunately!!

That´s the point of this document, I will demonstrate how to configure taxes into the SAP CPQ (Configuring – Pricing – Quote) without enhancement. Also, I will provide some good tips to create conditions to fulfill the project's requirements.

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

In this document, I will give an overview of how to define taxes in the Quote process. Of course, taxes are not equal everywhere, far from it. Every country has its own tax rates. Then, I will explain how to the SAP CPQ´s approach to this topic, but it is inevitable to enhance this implementation to reach your Project's requirement using CPQ's conditions and coding Phyton Script.

Let´s see how SAP CPQ implementation is dealing with the tax topic!! I hope you enjoy it!

1.2. Configuring the Country/Regional Taxes

Clicking the link "Country/Region Sales Tax".

To our document, I will create a 4% tax to Brazil. Of course, this is AN "example", just a number. Then, Save the record!!

1.3.   Configuring Country/Region Tax Formula

Now, it is possible that simple tax rate "4%" is extremely simple for your Country reality. Then, to reach this tax's complexity SAP CPQ allow you to create formulas and call Phyton Scripts. Then, I will click in the button "Country/Region Tax Formula".
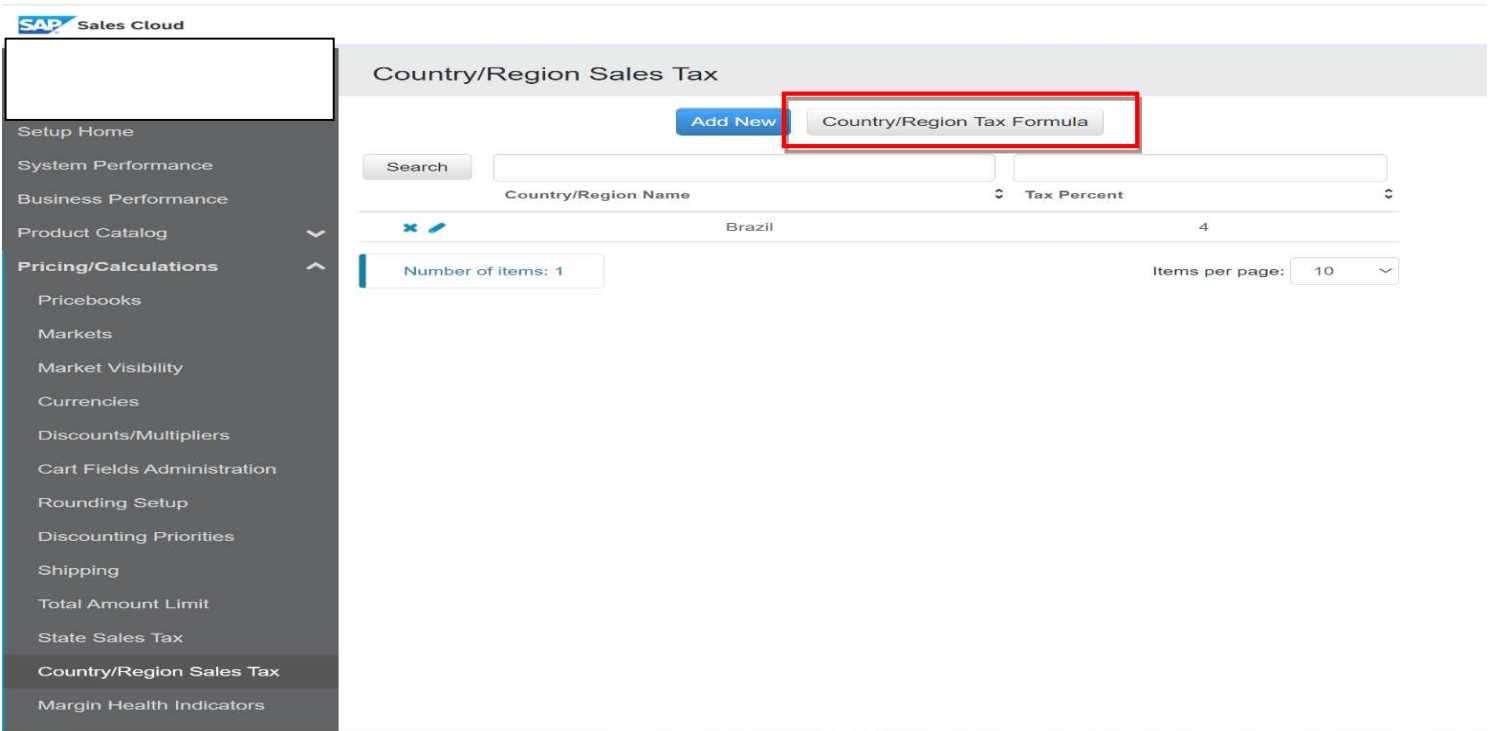
Please, click in the icon below.
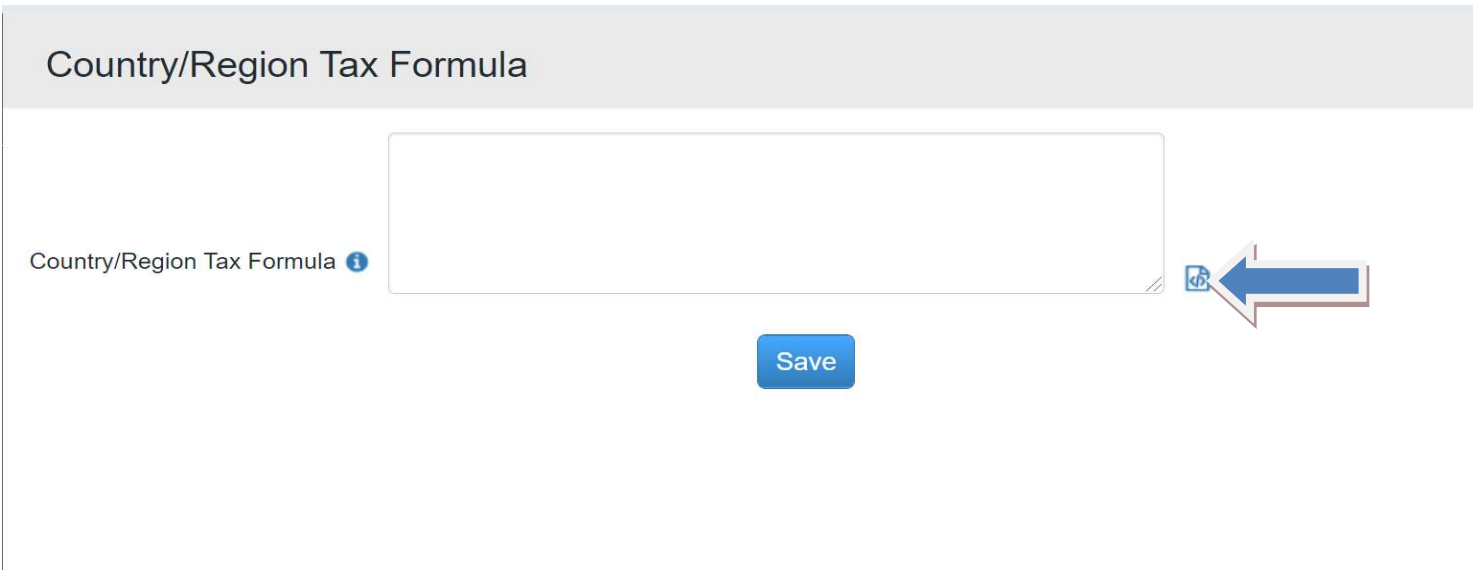
Here, there are a lot of Quote's TAGs, Operators, conditions, also I can read a Custom Table, and much more!! Even with a so complex tax as Brazil, it is possible to implemented it into the SAP CPQ's configuration. It is possible to call a Phyton code to implement your Project's tax as well.
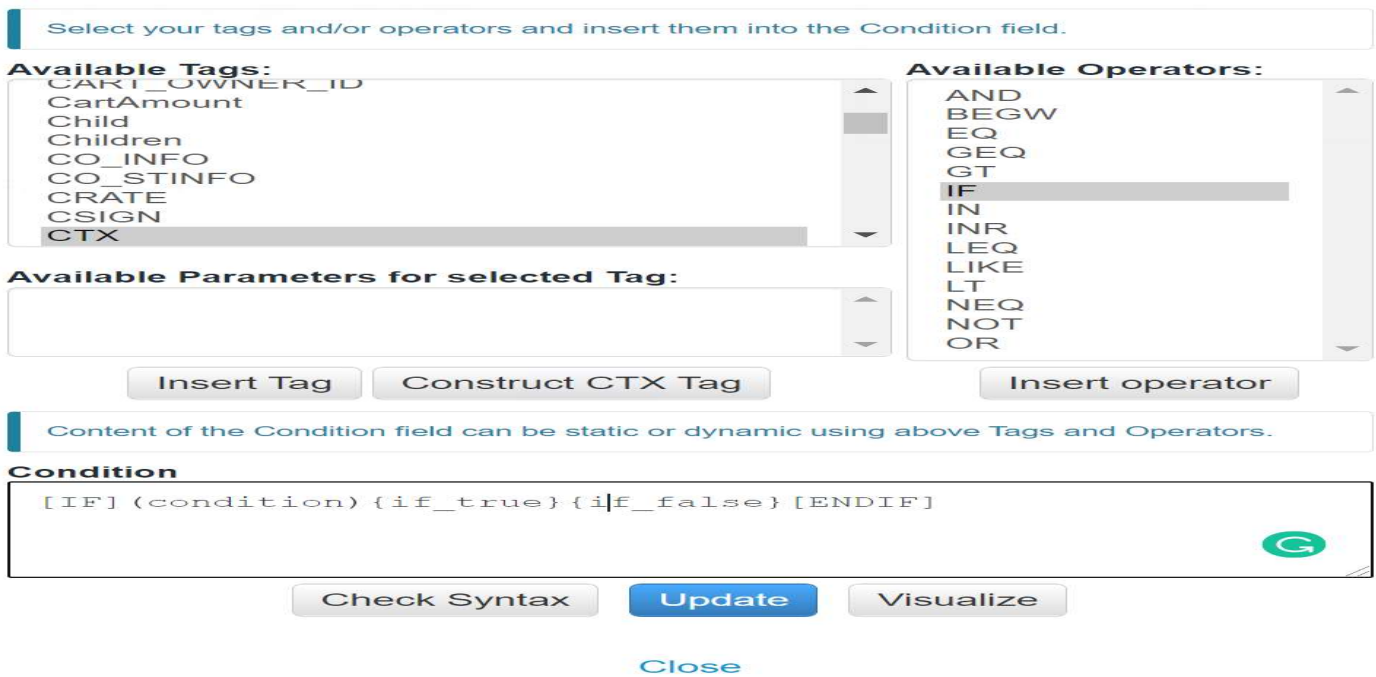
1.4.   Configuring the State Sales Taxes

Now, I will define some Brazil's states for our document, and define an **imaginary** tax rate to fulfill our document requirement. Click the link "State Sales Tax". Then, I can create a new one, or edit an existing record.
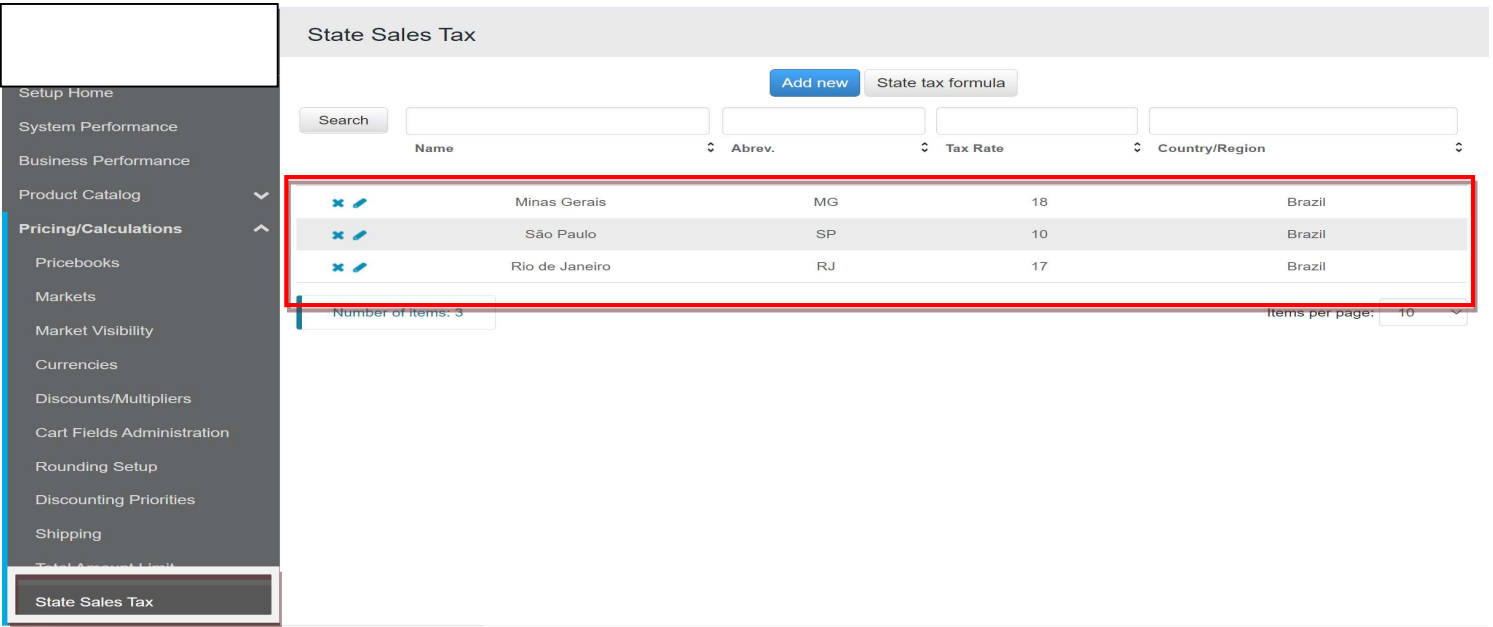
Now, I will define a tax rate of 18%, then save the record.
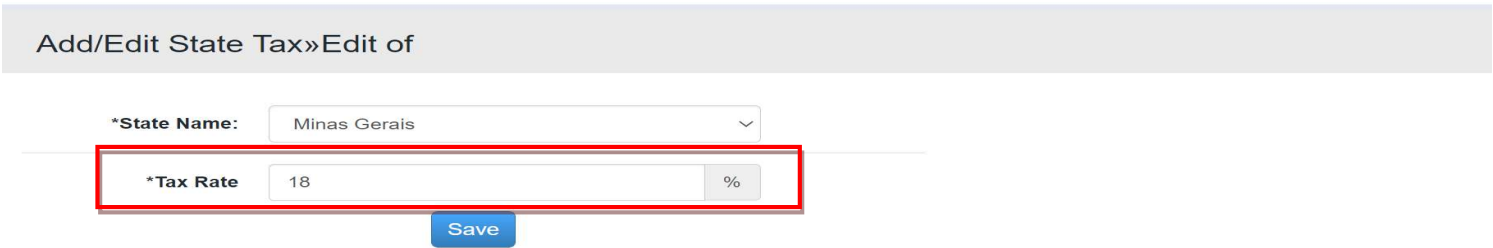
1.5.   Configuring the State Tax Formula

As I commented with Country Tax Formula, I have the same using Sate Tax Formula. Then, I will click in the button "State tax formula"

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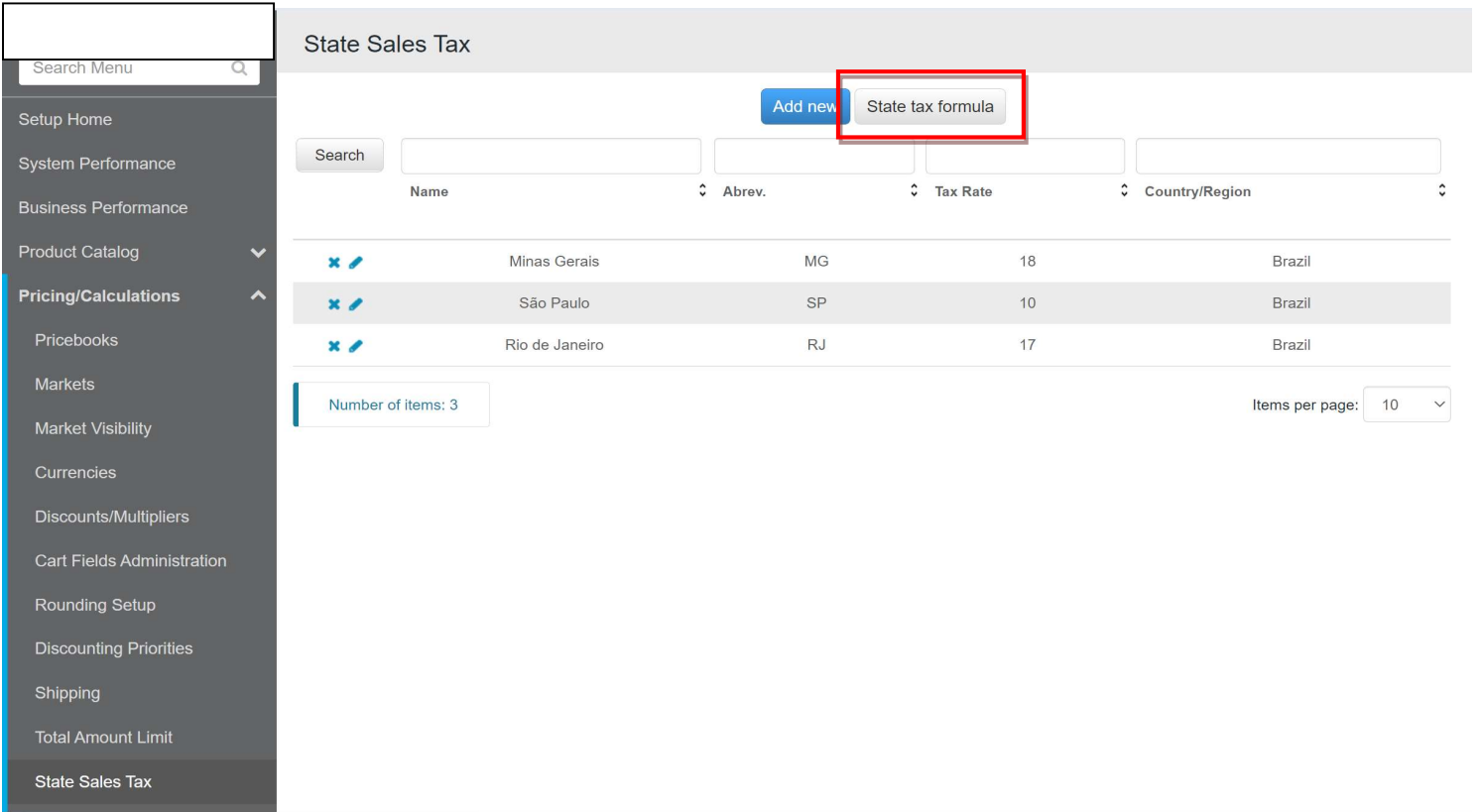
Click the icon below

State Tax Formula»Edit

State Tax Formula: ⓘ

Save

Now, I have TAGs, Parameters, Operators to create conditions, also I can call Phyton Scripts to implement a complex Country's tax rate.

Select your tags and/or operators and insert them into the Condition field.

Available Tags:
CO_STINFO
CRATE
CSIGN
CTX
CU_INFO
Custom_Field
CustomerCompany
CustomerCountry
CustomerTerritorv

Available Operators:
AND
BEGW
EQ
GEQ
GT
IF
IN
INR
LEQ
LIKE
LT
NEQ
NOT
OR

Available Parameters for selected Tag:
RECORD_STATUS
TERITORY_ID
ID
ACTIVE

Insert Tag

Insert operator

Content of the Condition field can be static or dynamic using above Tags and Operators.

Condition

[IF](condition){if_true}{if_false}[ENDIF]

Check Syntax   Update   Visualize

Close

1.6.   Testing the Quote's taxes

Now, let us test our configuration, right??

Just to remember, I defined 4% for Brazil, and 18% for the state Minas Gerais.
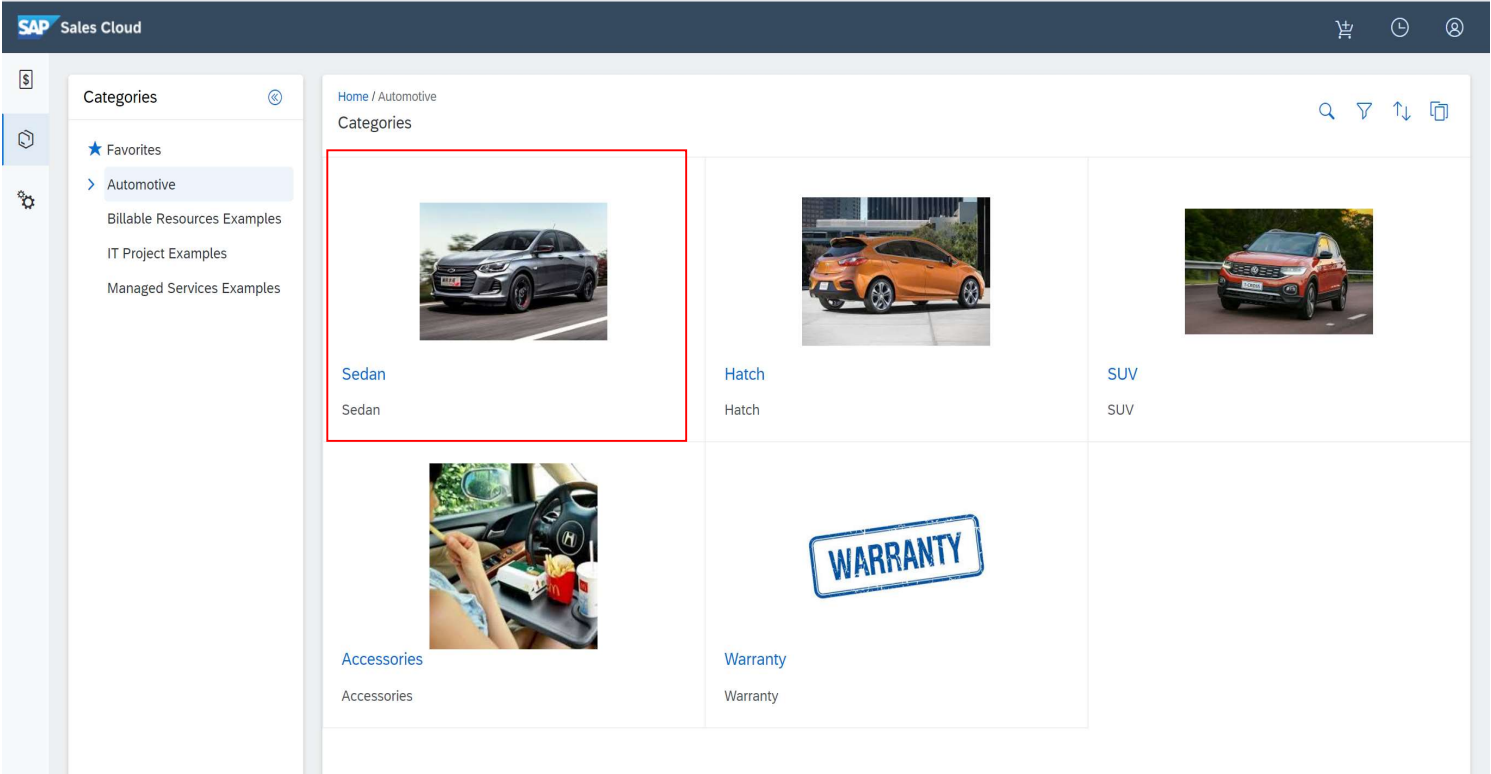

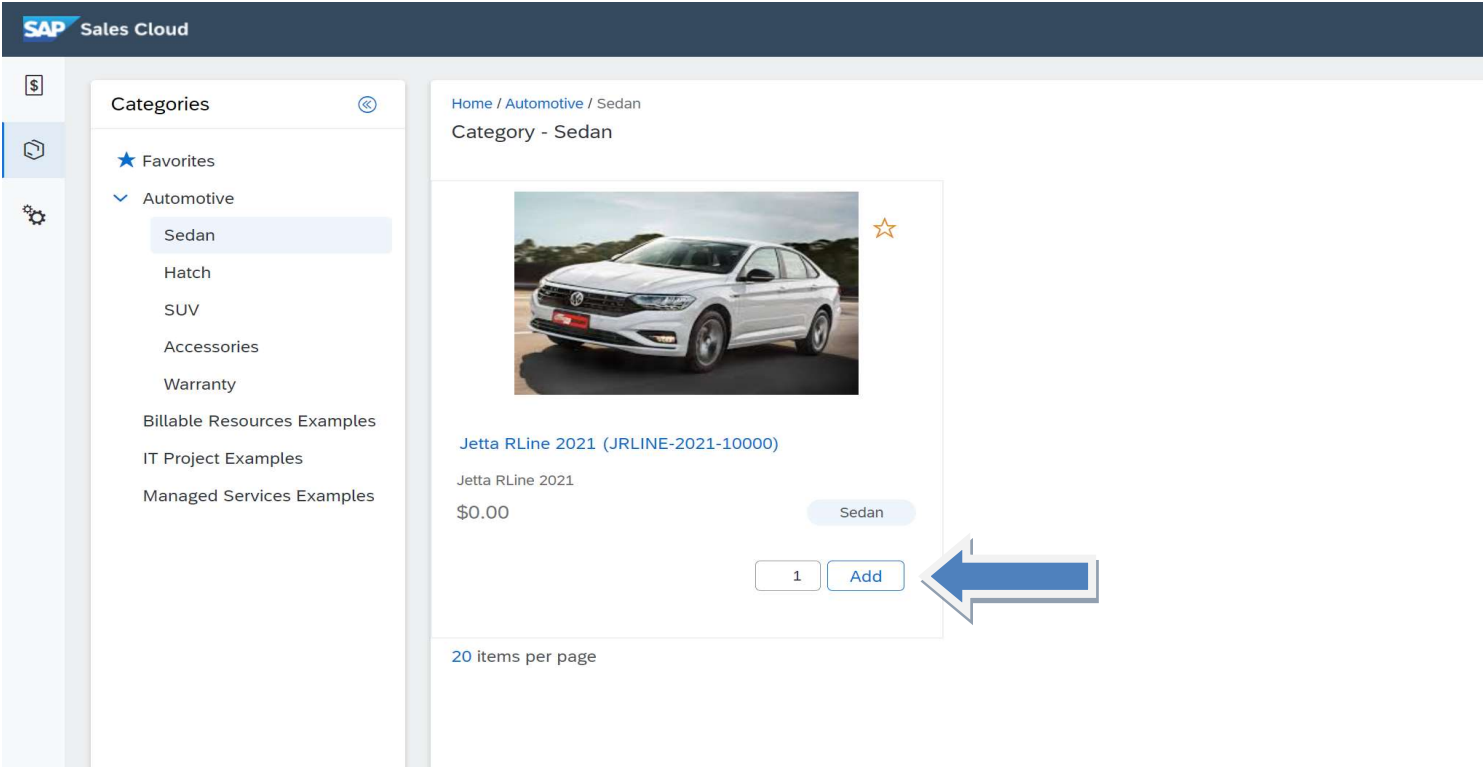Accessing the SAP CPQ's solution, I will quote my favorite car. Then, I will click in the "Automotive" category.
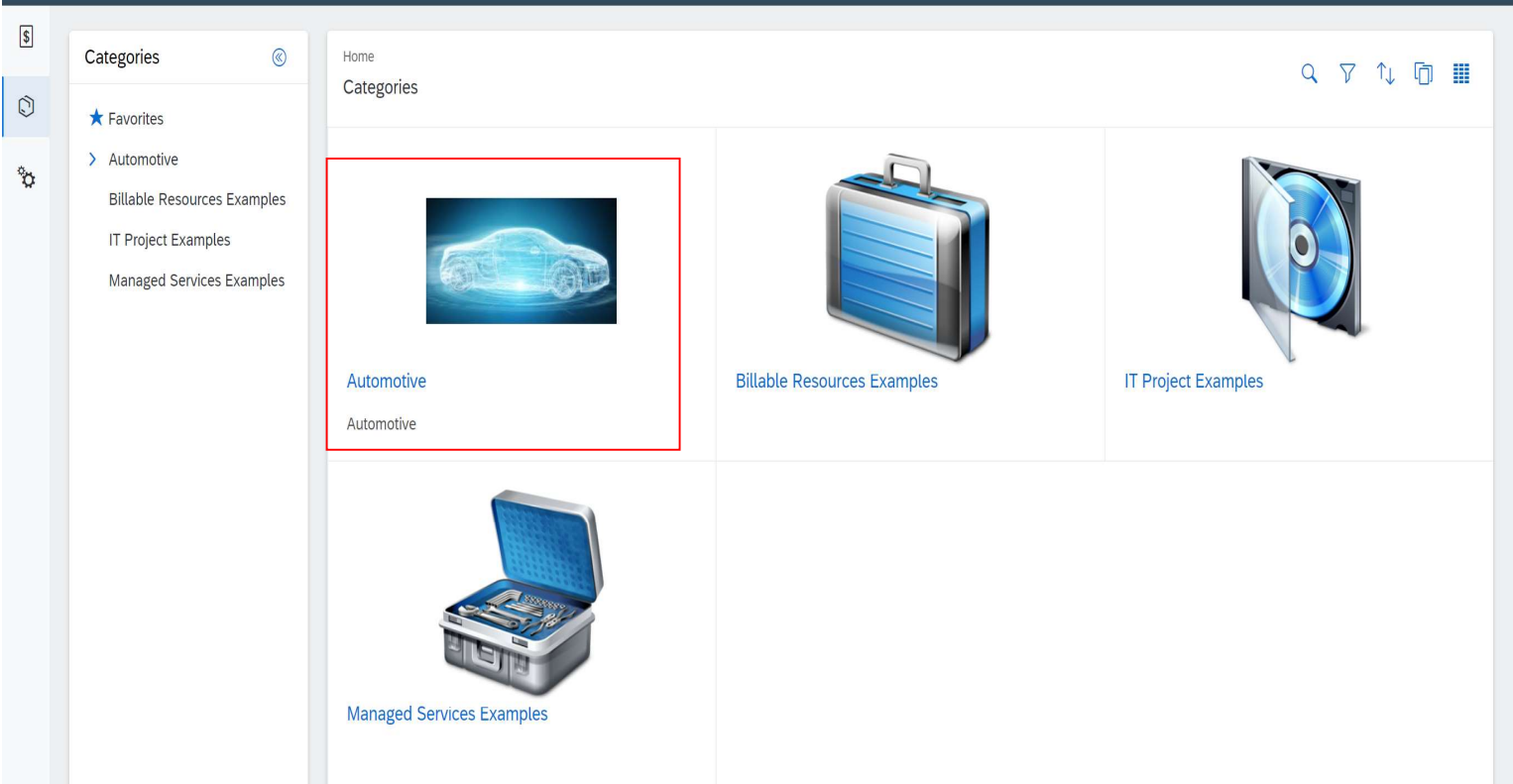
I will click in the subcategory "Sedan"

Click the button "Add" below

Check this out, the Car Jetta cost US$ 128.000.

Below, the taxes are not defined already.

Then, I just choose the customer "Bill to" and "Ship To". This customer's address is Brazil and Minas Gerais.

Returning to the Quote, the state tax and country tax is defined with the % values already configured.

Pretty interesting right?? I hope you enjoy this document!!

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