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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 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”.

The screenshot shows the SAP Sales Cloud interface for configuring Country/Region Sales Tax. On the left is a navigation menu with options like Setup Home, System Performance, Business Performance, Product Catalog, Pricing/Calculations (expanded), Pricebooks, Markets, Market Visibility, Currencies, Discounts/Multipliers, Cart Fields Administration, Rounding Setup, Discounting Priorities, Shipping, Total Amount Limit, State Sales Tax, Country/Region Sales Tax (highlighted with a red box), and Margin Health Indicators. The main area is titled 'Country/Region Sales Tax' and contains an 'Add New' button and a 'Country/Region Tax Formula' button. Below these is a search bar and a table. The table has two columns: 'Country/Region Name' and 'Tax Percent'. A single row is visible, showing 'Brazil' and '4', which is highlighted with a red box. Below the table, it says 'Number of items: 1' and 'Items per page: 10'.

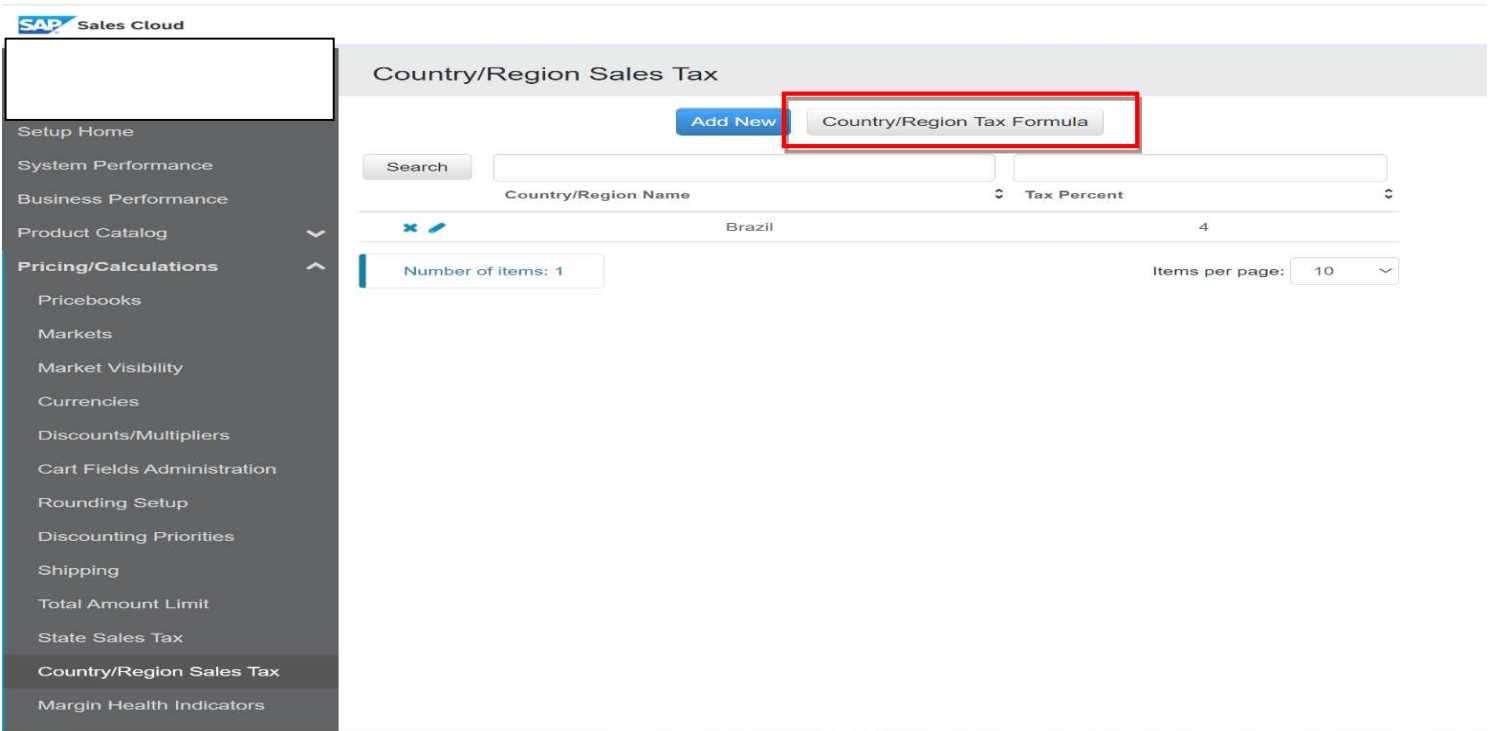
To our document, I will create a 4% tax to Brazil. Of course, this is AN “example”, just a number. Then, Save the record!!

The screenshot shows the 'Country/Region Sales Tax » Edit of' form. It has two main fields: '* Country/Region Name' with a dropdown menu showing 'Brazil', and '* Tax Percent' with a text input field containing '4' and a percentage symbol (%). The 'Tax Percent' field is highlighted with a red box. Below the fields is a 'Save' button.

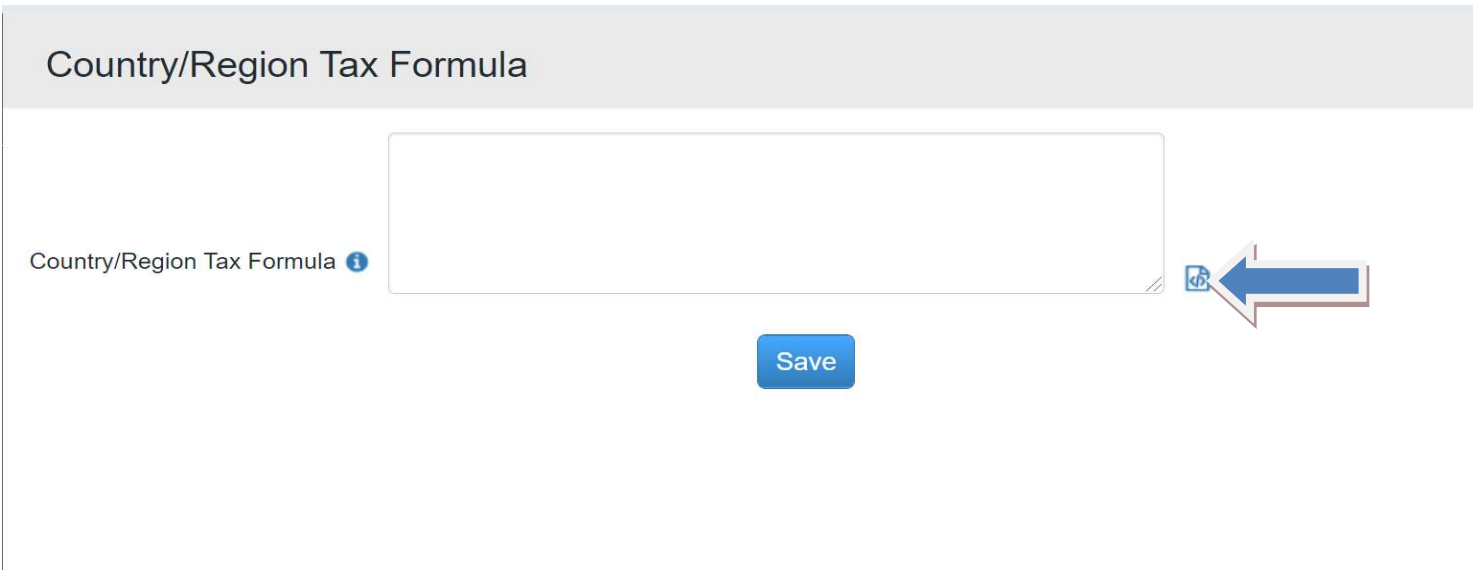
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1.3. Configuring Country/Region Tax Formula

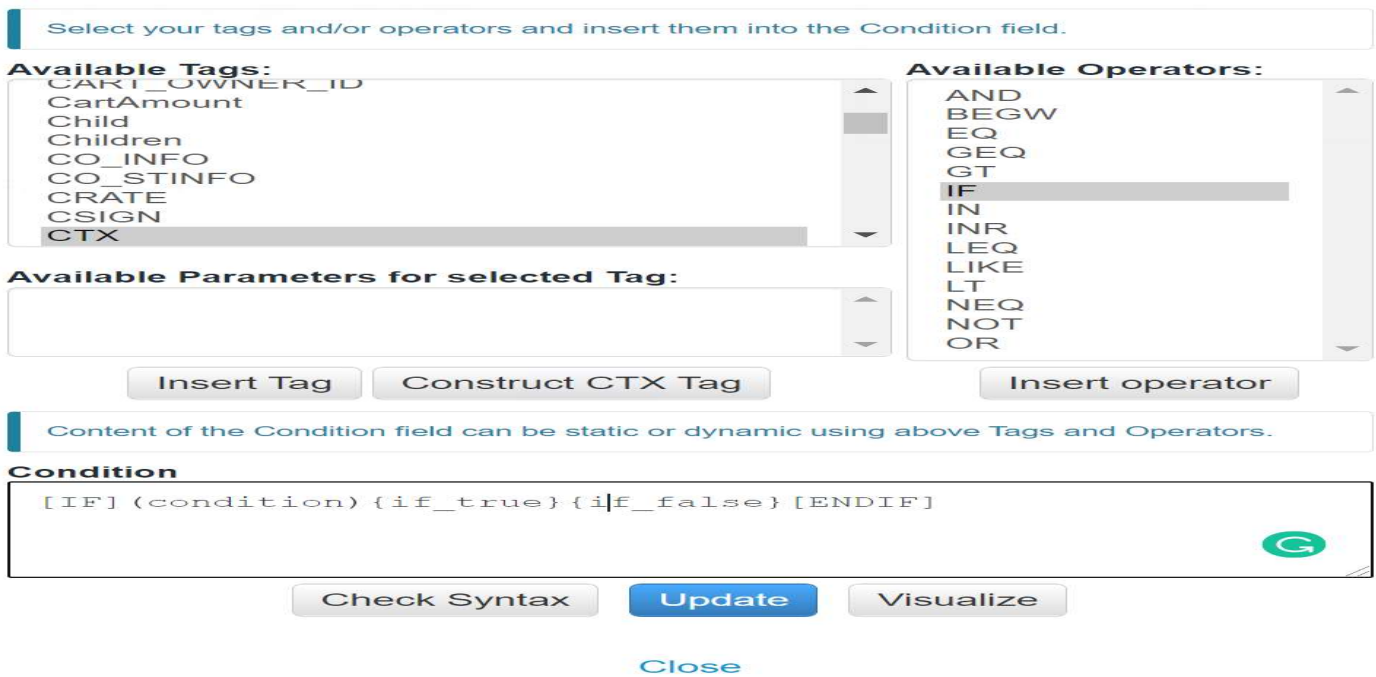
Now, it is possible that simple tax rate “4%” is extremely simple for your Country reality. Then, to reach this tax’s complexity SAP CPQ allow you to create formulas and call Python Scripts. Then, I will click in the button “Country/Region Tax Formula”.



Please, click in the icon below.

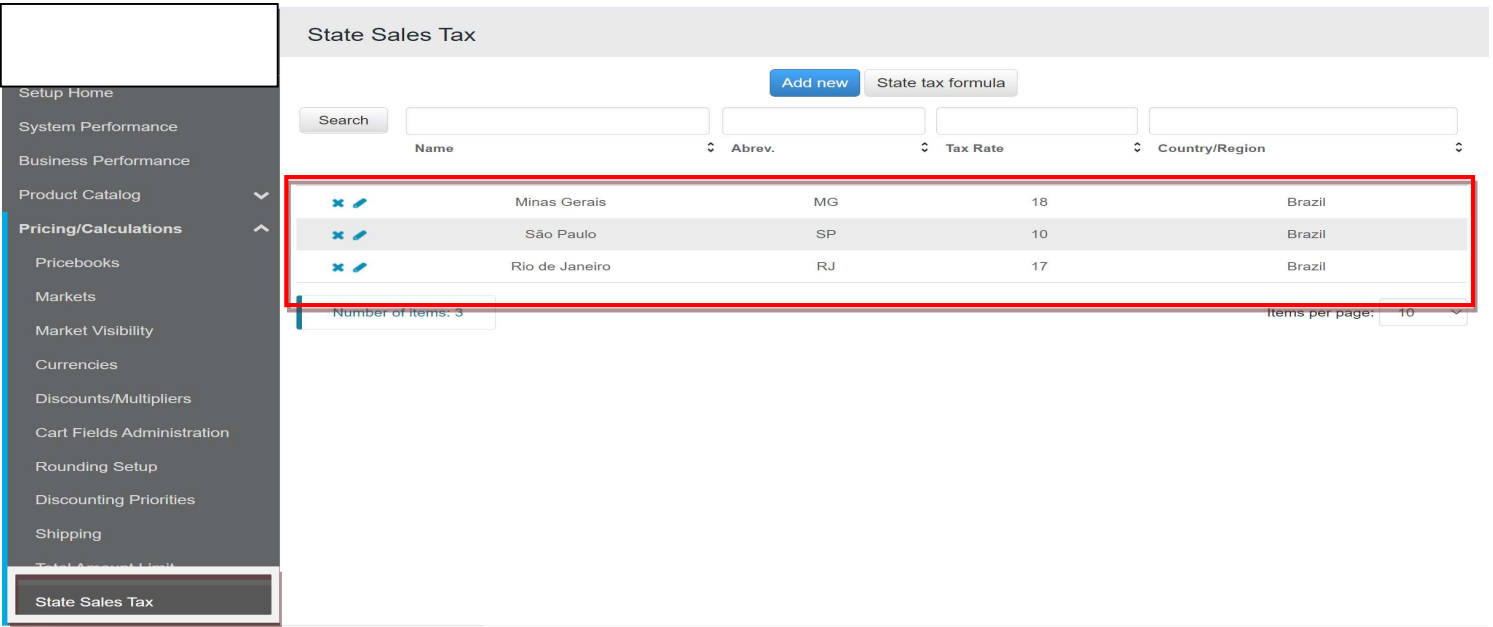


Here, there are a lot of Quote’s TAGs, Operators, conditions, also I can read a Custom Table, and much more!! Even with a so complex tax as Brazil, it is possible to implemented it into the SAP CPQ’s configuration. It is possible to call a Phyton code to implement your Project’s tax as well.

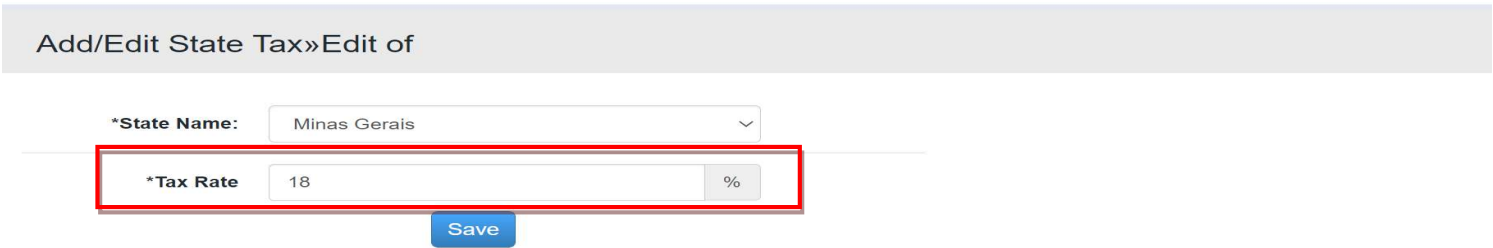


1.4. Configuring the State Sales Taxes

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.

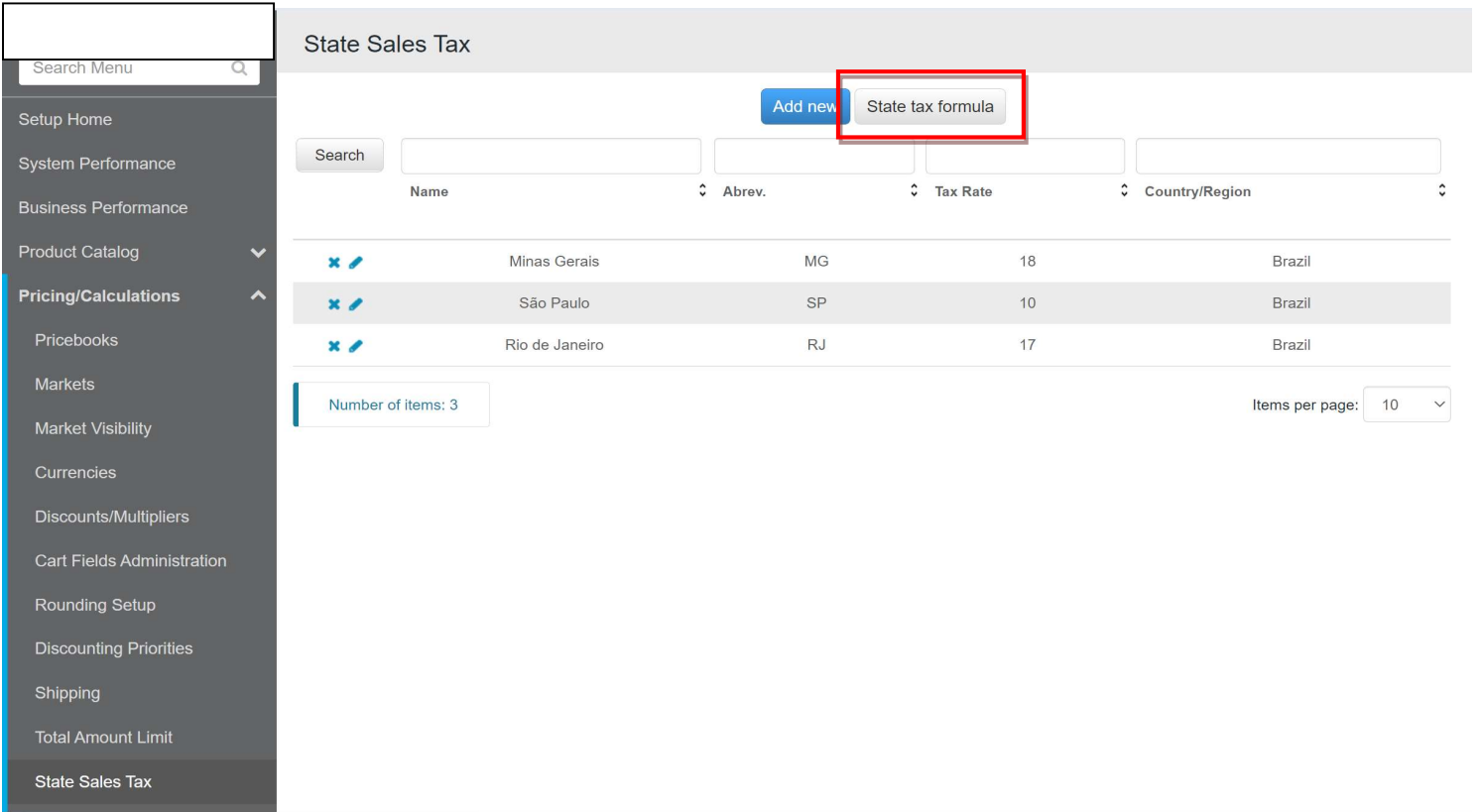


Now, I will define a tax rate of 18%, then save the record.



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
CustomerTerritory

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

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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.


Search

Country/Region Name

↕

Tax Percent

↕

	Brazil	4
---	--------	---

Number of items: 1

Items per page: 10

Search

Name

↕

Abrev.




↕

Tax Rate

↕

Country/Region

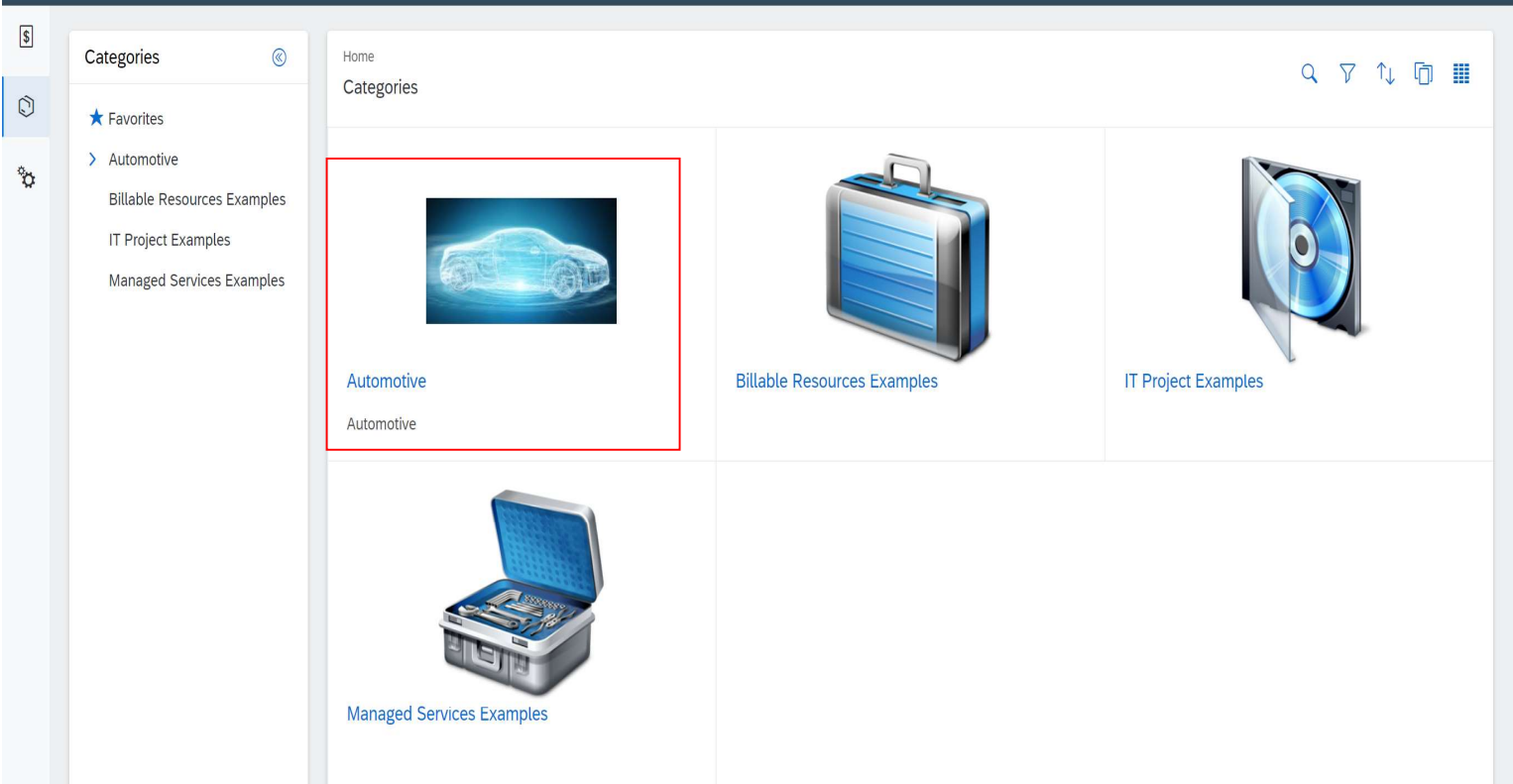
↕

	Minas Gerais	MG	18	Brazil
	São Paulo	SP	10	Brazil
	Rio de Janeiro	RJ	17	Brazil

Number of items: 3

Items per page: 10

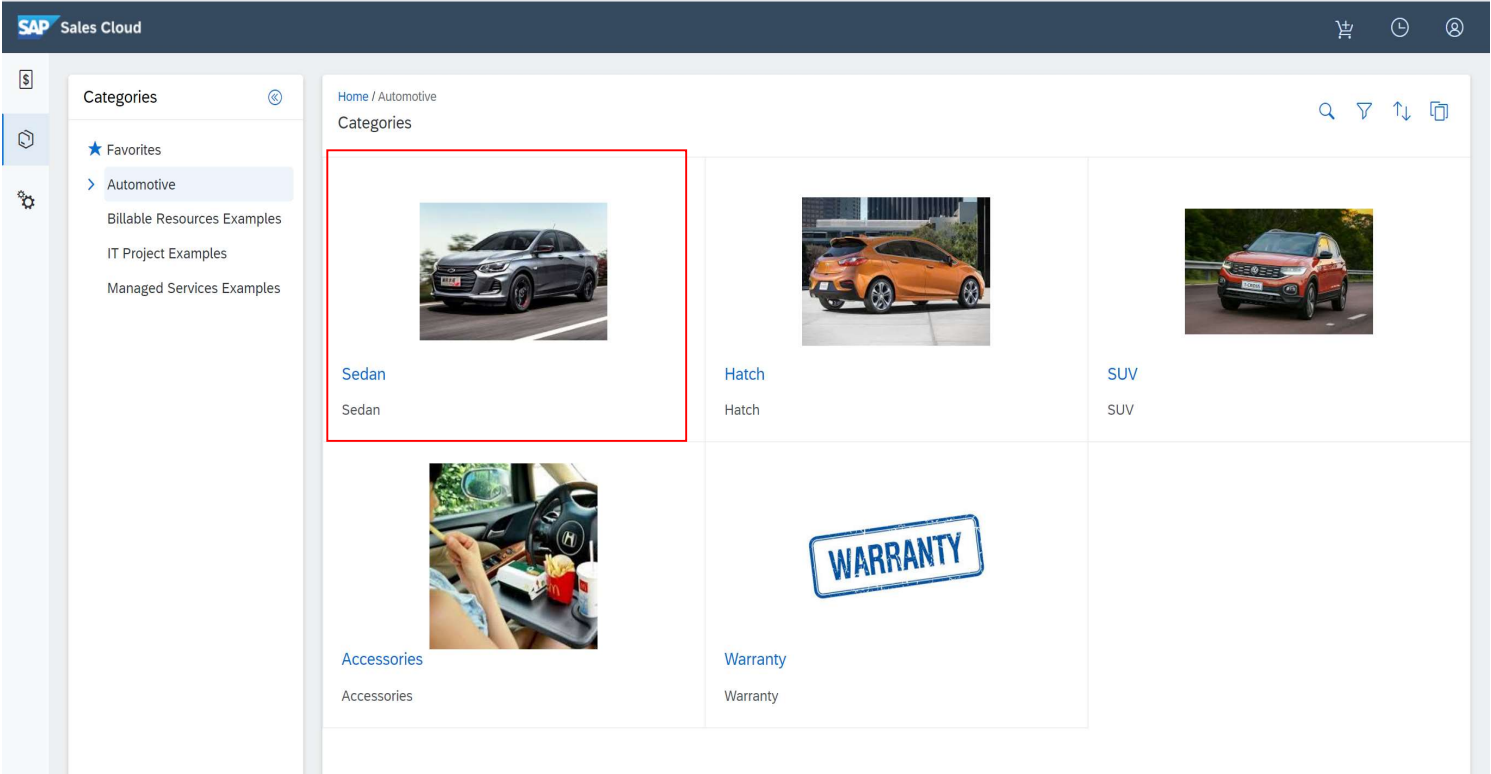
Accessing the SAP CPQ’s solution, I will quote my favorite car. Then, I will click in the “Automotive” category.



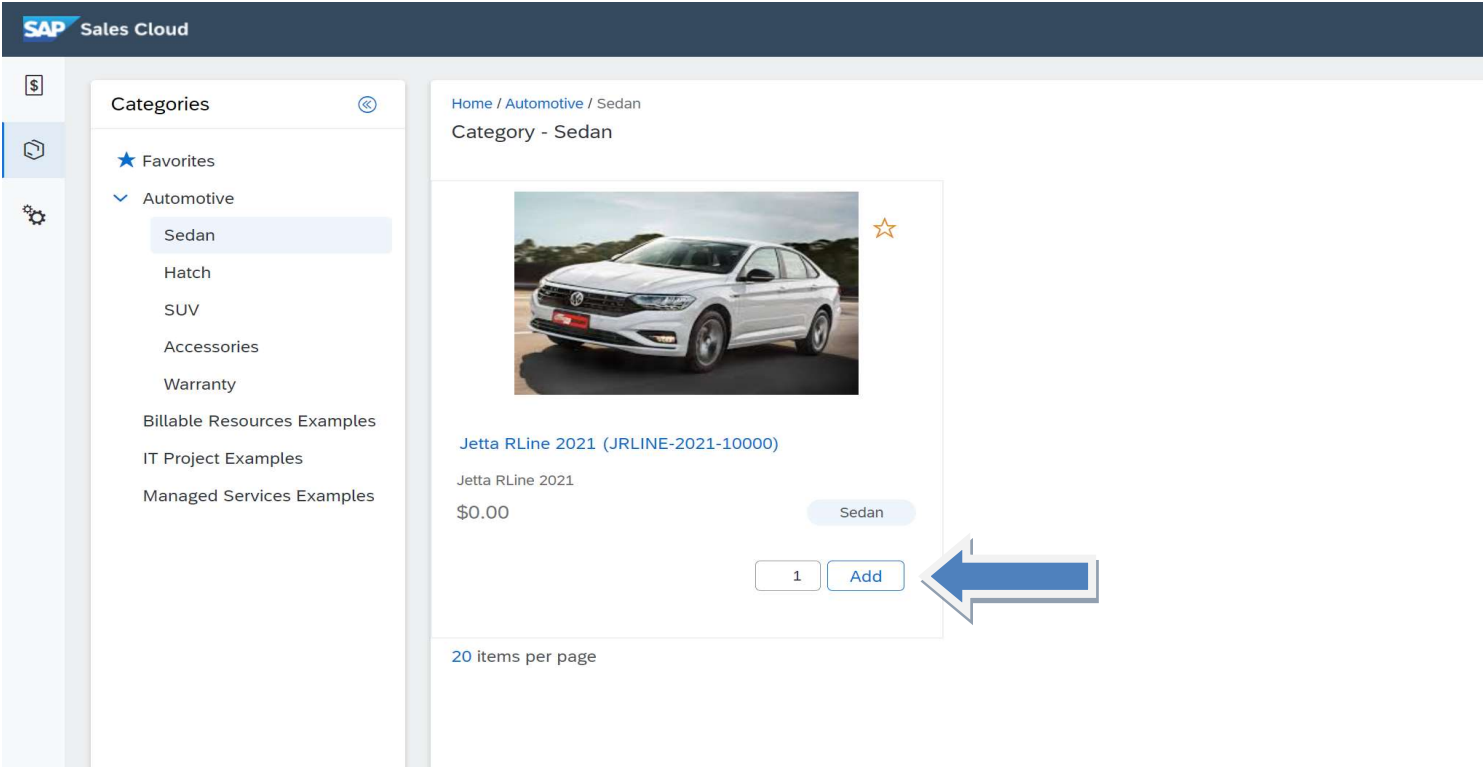
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I will click in the subcategory “Sedan”



Click the button “Add” below



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

Quote #01180020 / MASTER

CheckOutAdd ItemReprice...

Customer InfoQuotationDocumentsAdditional Info

Quote Info

StatusPreparing

MarketModulo CRM Services

PricebookModulo CRM Services

Sales Order ID

Date Created01/09/21

Effective Date01/09/21

RevisionMASTER (Active)

Cart Comment

Products

Add Items

	Item	Quantity	List Price		Discount Percent		Margin Health		Extended Amount		Promo Discount Amount
			NRC	MRC	NRC	MRC	NRC	MRC	NRC	MRC	
	JRLINE-2021-10000 Jetta RLine 2021	1	\$ 128,000.00	\$ 0.00	0.00	0.00			\$ 128,000.00	\$ 0.00	\$ 0.00

Below, the taxes are not defined already.

Costs

Shipping\$ 10,000.00Standard Shipping

State Tax	0.00 %	NRC	\$ 0.00
		MRC	\$ 0.00
VAT	0.00 %	NRC	\$ 0.00
		MRC	\$ 0.00

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

SAP Sales Cloud

Quote #01180020 / MASTER

Customer InfoQuotationDocumentsAdditional Info

Bill To

Search customers by name or company

First NameClaudio

Last NameGoulart

Customer ID1000000

Company*Modulo CRM

Address 1Manoel dos Santos 308 apto 903

Address 2

CityAraxá-MG

State / Province*Minas Gerais

Province

ZIP / Postal Code38184-248

Country/Region*Brazil

Ship To

Search customers by name or company

First NameClaudio

Last NameGoulart

Customer ID1000000

Company*Modulo CRM

Address 1Manoel dos Santos 308 apto 903

Address 2

CityAraxá-MG

State / Province*Minas Gerais

Province

ZIP / Postal Code38184-248

Country/Region*Brazil

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

Quote #01180020 / MASTER

CheckOutAdd ItemReprice...

Customer InfoQuotationDocumentsAdditional Info

Quote Info

Status

Preparing

Date Created

01/09/21

Date Modified

01/09/21

Cart Comment

Market

Modulo CRM Services

Effective Date

01/09/21

Pricebook

Modulo CRM Services

Revision

MASTER (Active)

Sales Order ID

Products

Add Items

	Item	Quantity	List Price		Discount Percent		Margin Health		Extended Amount		Promo Discount Amount
			NRC	MRC	NRC	MRC	NRC	MRC	NRC	MRC	
	JRLINE-2021-10000 Jetta RLine 2021	1	\$ 128,000.00	\$ 0.00	0.00	0.00			\$ 128,000.00	\$ 0.00	\$ 0.00

Costs

Shipping

\$ 10,000.00

Standard Shipping

State Tax

18.00 %

NRC

\$ 23,040.00

MRC

\$ 0.00

VAT

4.00 %

NRC

\$ 5,120.00

MRC

\$ 0.00

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