Customization Guide - SAP CPQ - Callidus

Version

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

Brief Description

During a CPQ's implementation, SAP allows you to import product in an easy way. Using the standard functionality "Import Products" is possible to import records into CPQ's database through CSV file.

I hope you enjoy it!!

<u>Author</u>

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.

Contact Data

Email: cjsgoulart@gmail.com

Blog: www.modulocrm.com.br

LinkedIn: <u>https://www.linkedin.com/in/cgoulart/</u>

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 1

Customization Guide - SAP CPQ - Callidus

Content

1. Ar	ticle
1.1.	Description
1.2.	Checking our Car Model
1.3.	Downloading the Product Template
1.4.	Preparing the file to upload the new Cars
1.5.	Uploading the images of Cars
1.6.	Importing the Products9
1.7.	Testing the new Products

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 2

Customization Guide - SAP CPQ - Callidus

1. Article

1.1. Description

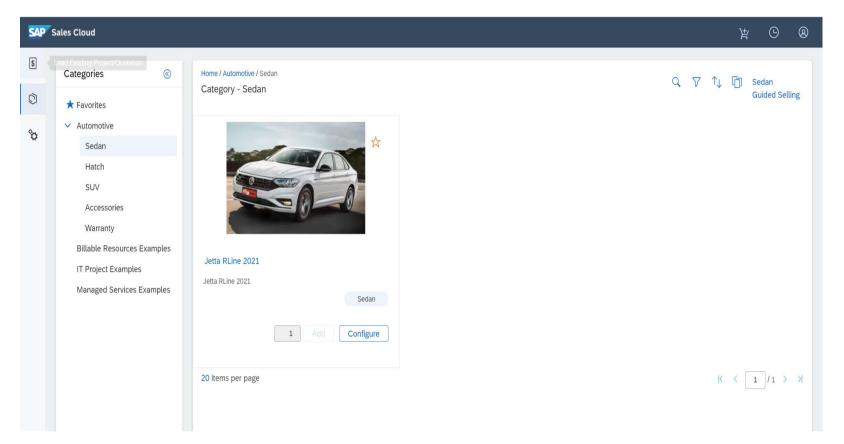
During a project, the migration data is always a painful activity. But NOT with SAP CPQ platform. The CPQ's Import tool is easy and flexible, allowing you import thousands of records in seconds. This document will provide some tips to make your data import activity an amazing experience.

Let's check it out!!

1.2. Checking our Car Model

I will create 3 new cars (BMW, Ferrari, and Mercedes). To start our data import, I will take the car "Jetta Rline 2021" as our model record.

Below, I will demonstrate how Jetta Rline it is.



As a configurable product, Jetta has 3 fields (Engine, Doors, SATNAV). That's obvious, I am not an expert in cars!! But those fields will make my point of this article.

SAP	Sales Cloud						岸	9	8
\$	Home Category / Automotive / Sedan / Jetta RLine Jetta RLine 2021 Complete	2021	Add to Quote	₫ ☆	Configuration S Part Number Base Price	ummary Configuration Tr JRLINE-2021-10000 \$0.00	ee		
°	Select Engine Engine 1.0 (\$400.00)	Select Doors 4 [\$150.00]	Choose SatNav Ves [\$1,000.00] No [\$0.00]		Base Recurring Price	\$0.00 / month			
L	Formula Validator	[Open in a f	New Window] [Open]		Items Engine Engine 1.0	One Time \$400.00	Recurring		
					Doors				

Total	Price for JRLINE-2021-10000 could not be found in test_USD_L1 pricebook.						
SatNav	\$1,000.00						
Engine	\$400.00						
Doors	\$150.00						
Yes	\$1,000.00						
SatNav							
4	\$150.00						

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 3

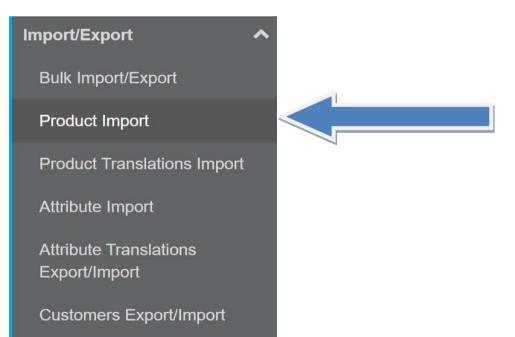
Customization Guide - SAP CPQ - Callidus

That's is the quote to Jetta Rline

ales Cloud											岸	G	'≓ <mark>1</mark>
Quote #0118002	29 / MASTER									CheckOut	Add Item	Reprice	000
Customer Info Q	Ouotation Documents	Additional Info											
Quote Info													
Status	Date Created		Date Modified			Cart Comment							
Preparing		~	01/17/21		01/17/21								
Market			Effective Date										
Modulo CRM Se	ervices	~	01/17/21		**								
Pricebook			Revision										
						- 0							
Modulo CRM Se	ervices	~	MASTER (Activ	/e)		• 0							
	ervices	~	MASTER (Activ	(e)		•	_	Add Iten	ns		٩ (۵ +	Ī
Sales Order ID Products		~			List Price		Discount Perc		ns	Health	Q { Extended Amount		Pror
Sales Order ID	Item	~	MASTER (Activ	Quantity	List Price NRC	MRC	7			Health			Pror Disc
Sales Order ID Products							Discount Perc	ent	Margin		Extended Amount		Pror Disc Amo
Sales Order ID Products	Item		Q Vehicle	Quantity	NRC	MRC	Discount Perc	MRC	Margin NRC	MRC	Extended Amount	MRC	Pror Disc Amo
Sales Order ID Products	Item 1 × JRLINE-2021-100 Jetta RLine 2021		Q Vehicle I Vehicle	Quantity	NRC \$ 128,000.00	MRC \$ 0.00	Discount Perc NRC 0.00	MRC	Margin NRC	MRC	Extended Amount NRC \$ 128,000.00	MRC \$ 0.00	Pron Disc Amo \$ C \$ C

1.3. Downloading the Product Template

After checking my template car out, I will download that car as a template. Click the link "Bulk Import Export>Product Import".



Companies Export/Import

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 4

Customization Guide - SAP CPQ - Callidus

That functionality allows you to download templates in different ways using the object products.

Product Import		
Step 1		
Download Excel Template	vith sample data or Download Existing Products into Excel Template Export Products	
Sample Products (Click to download file)	Create Template by Exporting Products from Select Categories or Create Template by Exporting All Products	
Step 2		

To accomplish my objective, I need to define what will be the products primary key. It can be done with Part Number, External ID, MPN, CPQ ID and much more.

Step 2

Populate template with your product data. During import, all products above the first empty row in the file are imported. After the empty row is found, all other rows under it are ignored. When importing products, you don't need to upload all columns. If you leave out columns that you don't need, it will take less time for system to process products. Maximum number of products that can be imported through one file is 2500. When updating products, limit is extended to 20000 products if imported file contains only columns from the list: ExternalID, UPC, MPN, Inventory, LeadTime, FamilyCode, Active, Product Name, ID, Part Number.
Step 3
Specify product identifier which will be used as criteria to determine if a new products will be added or existing products will be updated
○ Part Number
○ Product Name
O External ID
○ UPC (Universal Product Code)
O MPN (Manufacturer Part Number)
• CPQ ID
O Product Family Code
\bigcirc None (product is always created)
Step 4
Select and Upload the file with your product data. File formats that you can upload are xlsx and xls. Cells with data type "date" are only supported for xlsx file format.
Escolher arquivo Nenhum arqo selecionado

For our example, I will search for the Jetta Rline and download the template using this product.

Product Impor	t
Step 1	
Download Excel Templ	late with sample data or Download Existing Products into Excel Template
Sample Data	Export Products



Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 5

Customization Guide - SAP CPQ - Callidus

Products													
 Select Language List Products: by us 		sh	v	Add New Impor	rt Products	Import Produ	ct Transla	ation					
Search	jetta			Choose Categories			~	~	~				
	Product \$	Part Number	Product Type	Category	Permission Group	Product User Interface	C Active	ə 🗘	Synced \$ from Back Office	Alias of	\$	System ID	Modif Date
@×≠∞★	Jetta RLine 2021	JRLINE- 2021- 10000	Vehicle	Sedan	Visible to everyone	⇔ Configurabl Product	e True		False			Jetta RLine 2021 cpg	1/17/2 7:21:1
Number of items: 1 Product expe		ort					Prod	uct	Transla	ation	Fx	Items per page: 1	0 ~
									Tranolo				
xport		1	Export	as			Export						
products listed :	above		• E	xcel (2,000 rows per file	e) 🚺		products listed above						
○ all products that match entered criteria ○ CSV (100,000 rows per file) ③				ile) 💶		O all	produ	ucts that mate	ch enter	ed ci	riteria		
 all products 				port products thout attributes		⊖ all products							
			Export		1						Exp	port	

Now, I will search for my car template, click on "Products listed above" option and then click the Button Export

A CSV file will be download with the previous action using my product template

Salvame	nto Automático (େ ୍	17-21_7-29	9-28 - Excel	Pesquisar			l	Claudio Goula	rt 🖸 🗹	- 0 >
Arquivo	Página Inici	al Inserir Des	senhar Layout da Pá	gina F	-órmulas Dados	Revisão Exi	bir Ajuda S	AP		යි Co	mpartilhar	Comentários
Colar		1 minute (1 minute)	$\begin{vmatrix} A^* & A^* \end{vmatrix} \equiv \equiv \equiv \boxed{2}$		Quebrar Texto Automat Mesclar e Centralizar		~ % 000 ★00 →00	Formatação Fo Condicional ~	rmatar como Estilos d Tabela Y Célula Y			Localizar e Selecionar ~
Área de Trans	fer 😼	Fonte	L2	Ali	nhamento	L2	Número 🛛		Estilos	Células	Ediçâ	o
C3	• : X	√ fx										
A	В	С	D	E F	G	Н	I J	К	L	M N	O P	Q
1 ID Pr	roduct Name	Product System ID	Part Number	UPC MPN	Product Family Code	Description	Product Type Price	e Image	Alternative Text C	ost Category	Rank Weight	Start Date End
2 271 Je	tta RLine 2021	Jetta_RLine_2021_c	pq JRLINE-2021-10000			Jetta RLine 2021	Vehicle	0 JETTARLINE.jpg		Automotive>Seda	an 10	
3												
4												

1.4. Preparing the file to upload the new Cars

Using this CSV file template, I will create 3 records in the CSV file.

- > Mercedes
- > BMW
- Ferrari

Important: Check the field "Image" out, I defined the same name of the column "Part Number", with the extension "JPG".

A4	$A4 \bullet : \times \checkmark f_X$												
	A B	С		E	F	G	Н	Г	J		L M	Ν	0
1	Product Name	Product System ID	Part Number	UPC	MPN	Product Family Code	Description	Product Type	Price	Image	Alternative Text Cost	Category	Rank We
2	Mercedes	Mercedes_2021_cpq	MERCEDES-2021-60000				Mercedes 2021	Vehicle	0	MERCEDES-2021-60000.jpg		Automotive>Sedan	20
3	BMW	BMW_2021_cpq	BMW_2021-50000				BMW 2021	Vehicle	0	BMW_2021-50000.jpg		Automotive>Sedan	30
4	Ferrari	FERRARI_2021_cpq	FERRARI_2021-60000				FERRARI 2021	Vehicle	0	FERRARI_2021-60000.jpg		Automotive>Sedan	40
5													
6													

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 6

Customization Guide - SAP CPQ - Callidus

1.5. Uploading the images of Cars

As mentioned, I have 3 cars, 3 images. Then I will upload those images using the standard functionality "File Management".

🖊 🛃 📜 🔻 Download	5		-	- 🗆	\times
Arquivo Início Compar	ilhar Exibir				~ ?
← → ∽ ↑ 🕹 > Este	Computador » Downloads	~ 3	ע פ	Pesquisar [Downloa
 Acesso rápido Área de Trabalho Downloads Documentos Imagens Determinação de Su Enviados por Tati se Material Processos OneDrive Este Computador Rede 	 Nome Hoje (4) ■ BMW_2021-50000 ■ FERRARI_2021-60000 ■ MERCEDES-2021-60000 ■ Products_01-17-21_7-29-28 				
	¢				>
4 itens					

Click the link "General>File Management" to access the functionality "File Management"

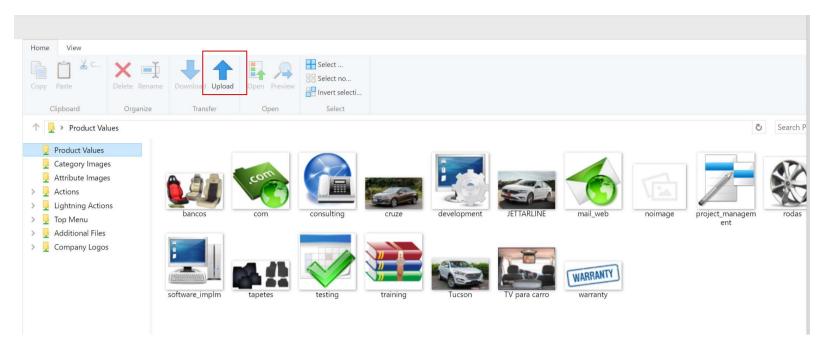
General 🔨	
Application Parameters	
Deploy / Send Changes	
Report Module	
Countries/Regions	
States	
Territories	
Tabs	
Dictionaries	
Manage Generated Documents	
File Management	

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 7

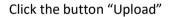
Customization Guide - SAP CPQ - Callidus

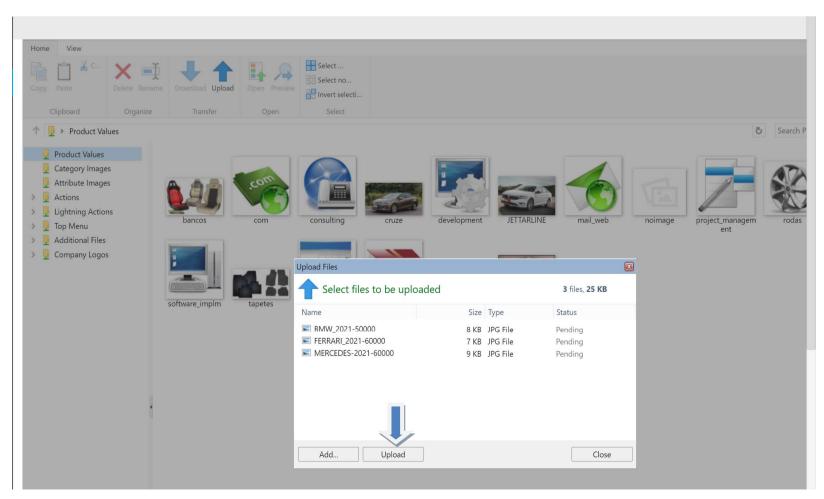
There are a lot of images, and tabs to organize those images. I will click in the button "Upload"



Then I will click the "Add" button, then check my Downloads. There will be 3 files representing each car. Please, Select the 3 files to upload.

SAP Sales Cloud	⑦	Ŀ
Domain: MODULOSERVICO_TST Search Menu Q Home View Setup Home Abrir X Image: Abrir Image: Abrir	Fire Invert selecti Select	
Organizar • Nova pasta 📗 • 🔟 🕐	Ö S	arch P
 Acesso rápido Área de Trabalho * Hoje (3) Bownloads Documentos Imagens Determinação de St. Enviados por Tati se Material Processos OneDrive Este Computador 	Image: Consulting inclusion of the state inclusion of the st	rodas
> 🗳 Rede		
Nome: Arquivos personalizados Abrir Cancelar	Add Upload Close	
Application Parameters		



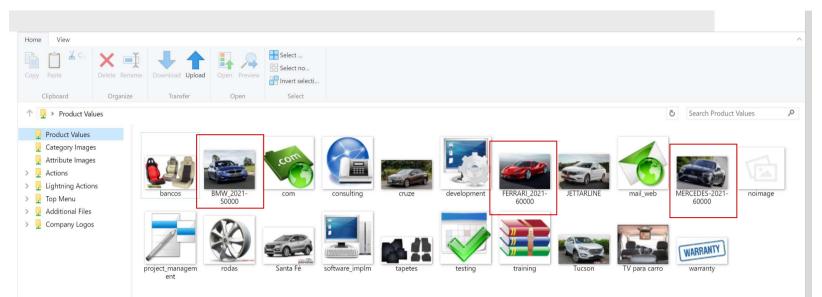


Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 8

Customization Guide - SAP CPQ - Callidus

Checking the images below, the cars BMW, Ferrari and Mercedes were uploaded to CPQ.



1.6. Importing the Products

Now, I will effectively import my new cars into the CPQ.

Product Import	
Step 1	
Download Excel Template v	with sample data or Download Existing Products into Excel Template
Sample Data	Export Products
Sample Products (Click to download file)	Create Template by Exporting or Create Template by Exporting All or Products from Select Categories Products or
Step 2	
	mit is extended to 20000 products if imported file contains only columns from the list: rentory, LeadTime, FamilyCode, Active, Product Name, ID, Part Number.
Specify product identifier wi	hich will be used as criteria to determine if a new products will be added or existing products will be updated
O Part Number	
O Product Name	
O External ID	
O UPC (Universal Pro	uduct Code)
O MPN (Manufacturer	r Part Number)
CPQ ID	
O Product Family Cod	te de la constante de la const
O None (product is alv	ways created)
Step 4	
Select and Upload the file w	with your product data. File formats that you can upload are xisx and xis. Cells with data type "date" are only supported for xisx file format.
·	

Escolher arquivo Nenhum arq...o selecionado

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 9

Customization Guide - SAP CPQ - Callidus

Court Data Court Data to 1	Abrir	×	
Sample Data Export Products	$\leftarrow \rightarrow \checkmark \uparrow \clubsuit$ > Este Comput > Downloads \checkmark U		
Sample Products Products from Select Categories Of Create Template by Exporting Of Create Template by Exporting	Organizar • Nova pasta	· · · ?	
(Click to download file)	Nome 📌 Acesso rápido	Data de modificação	
Step 2 Populate template with your product data. During import, all products above the first empty row in the When importing products, you don't need to upload all columns. If you leave out columns that you do Maximum number of products that can be imported through one file is 2500. When updating products, limit is extended to 20000 products if imported file contains only columns fro ExternalID, UPC, MPN, Inventory, LeadTime, FamilyCode, Active, Product Name, ID, Part Number. Step 3 Specify product identifier which will be used as criteria to determine if a new products will be added o	 Area de Trabalho A Hoje (4) Downloads BMW_2021-50000 FERRARI_2021-60000 MERCEDES 2021 60000 MERCEDES 2021 60000 Products_01-17-21_7-29-28 Determinação de St Enviados por Tati se Material Processos 	17/01/2021 10:39 17/01/2021 10:38 17/01/2021 10:38 17/01/2021 10:47	
Part Number Product Name External ID UPC (Universal Product Code) MPN (Manufacturer Part Number) CPQ ID	OneDrive Este Computador Rede Nome: Products_01-17-21_7-29-28	Todos os arquivos V	
 Product Family Code None (product is always created) 		Abrir Cancelar	
Step 4			
Select and Upload the file with your product data. File formats that you can upload are xlsx and xls. C	ells with data type "date" are only supported for xlsx file format.		
Escolher arquivo Nenhum arqo selecionado	rt		
Now, click the button "Import"			
Step 4			

Click the button "Choose file" and select the CSV file with our 3 new cars.

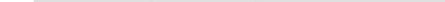
Select and Upload the file with your product data. File formats that you can upload are xlsx and xls. Cells with data type "date" are only supported for xlsx file format.

Escolher arquivo Products_01..._7-29-28.xlsx

Now, CPQ check the file and the records that will be inserted in the system. Click the button "Import without preview".

Import

Important: Notice there are no errors or warnings about our file.



That's it!!! Our products were inserted without errors.

Product Import		
	Products have been saved successfully.	
•	Go to Products page	

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 10

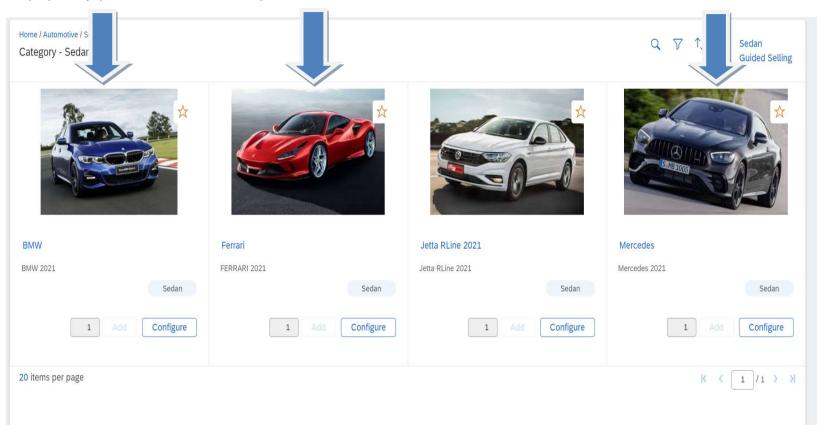
Customization Guide - SAP CPQ - Callidus

1.7. Testing the new Products

Now, that's the moment!!

Our products were inserted into the CPQ database, and they are available to Quote with their images.

I hope you enjoyed that CPQ's functionality.



The fields Doors, Engine and SATNAV are available for each one.

SAP	Sales Cloud					岸	©
\$	Home Category / Automotive / Sedan / Ferrari Ferrari Complete		Add to Quote 📑 📩	Configuration Su Part Number Base Price	FERRARI_2021-60000		
°	Select Doors Select Engine 2 [\$0.00] V	Select SatNav Yes [\$0.00]		Base Recurring Price	\$0.00 \$0.00 / month		
				Items	One Time	Recurring	
	Formula Validator	[Open in a New Window] [Open]		Doors			
				2	\$0.00		
				Engine			
				Engine 1.0	\$0.00		
				SatNav			
				Yes	\$0.00		
				Total	Price for FERRARI_2021-60000 could not be found in test_USD_L1 pricebook.		

Blog - Módulo CRM Email: claudio.goulart@modulocrm.com.br

Page 11