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Customization Guide - SAP CPQ - Callidus

Version

This article was created using the 2108 version of SAP CPQ Former (Callidus)

Brief Description

During a Quotation is extremely important to define some fields to enrich the sales and give to the customer all information available about the product. Also, it is equally important to create a relationship between those fields, restricting data inside of them. Allowing only data which makes sense to the Sales and Customer

I know, considering some restrictions or validations you can reach only creating enhancements or developments into your solution.

That's what I will talk about in this document, in the SAP CPQ – Callidus, it is possible to Create Fields, Validations, Data Checks, Exhibit messages to inform the Sales Rep about a specific scenario. All those points without a line of code. Sounds good, isn't it?

Well, I will provide some tips and tricks to keep your Quote Consistency and data reliable.

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

As I mentioned, during a Quote, especially a configurable product, it is important to create fields, define rules to data check, restricting data among the fields and more. Then, I will create 3 fields to a Car Sales Quotation, Doors, Engine and Color. During this document, I will provide customizing insights to apply into a real project.

Customer Requirements to implement

- It's possible have car with 2 or 4 doors
- The cars with 2 doors, I have Engines only with 1.0 and 1.4
- The cars with 4 doors, I have Engines with 2.0
- The cars with 2 doors, the color available only in black
 - The cars with 2 doors, it is necessary exhibit a message to the Sales Rep informing.

The image shows three dropdown menus for configuring a car. The first menu, 'Select Doors', has options '2 [\$0.00]' (selected), 'No option selected', and '4 [\$0.00]'. The second menu, 'Select Engine', has options 'Engine 1.0 [\$0.00]' (selected), 'No option selected', 'Engine 1.4 [\$0.00]', and 'Engine 2.0 [\$0.00]'. The third menu, 'Select Color', has options 'No option selected' (selected), 'Blue [\$0.00]', 'Yellow [\$0.00]', 'Green [\$0.00]', 'Grey [\$0.00]', and 'Black [\$0.00]'. The 'No option selected' option in the 'Select Color' menu is highlighted in blue.

Important: They are simple rules, but it will be enough to demonstrate the power of SAP CPQ - Callidus.

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1.2. Creating fields for Configurable Products

I will create 3 attributes into my product named “Ferrari”, Doors, Engine and Color with the data below. I won’t demonstrate how to create them, that’s not the proposal of this document, but here they are. The point is... there is no rule or data restriction defined so far. Then all data will be available without considering the Company Business.

Select Doors

2 [\$0.00]

No option selected

2 [\$0.00]

4 [\$0.00]

Select Engine

Engine 1.0 [\$0.00]

No option selected

Engine 1.0 [\$0.00]

Engine 1.4 [\$0.00]

Engine 2.0 [\$0.00]

Select Color

No option selected

No option selected

Blue [\$0.00]

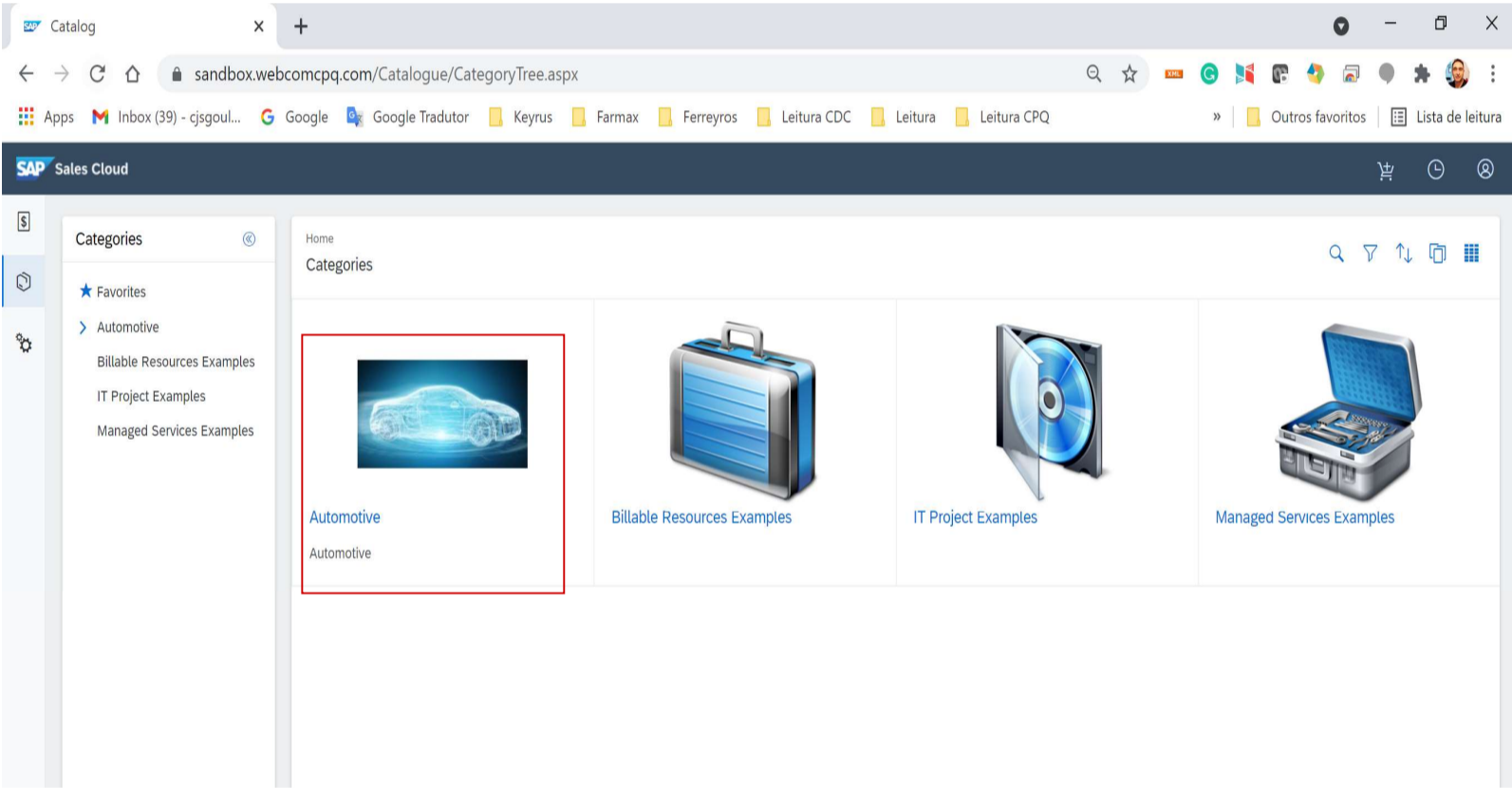
Yellow [\$0.00]

Green [\$0.00]

Grey [\$0.00]

Black [\$0.00]

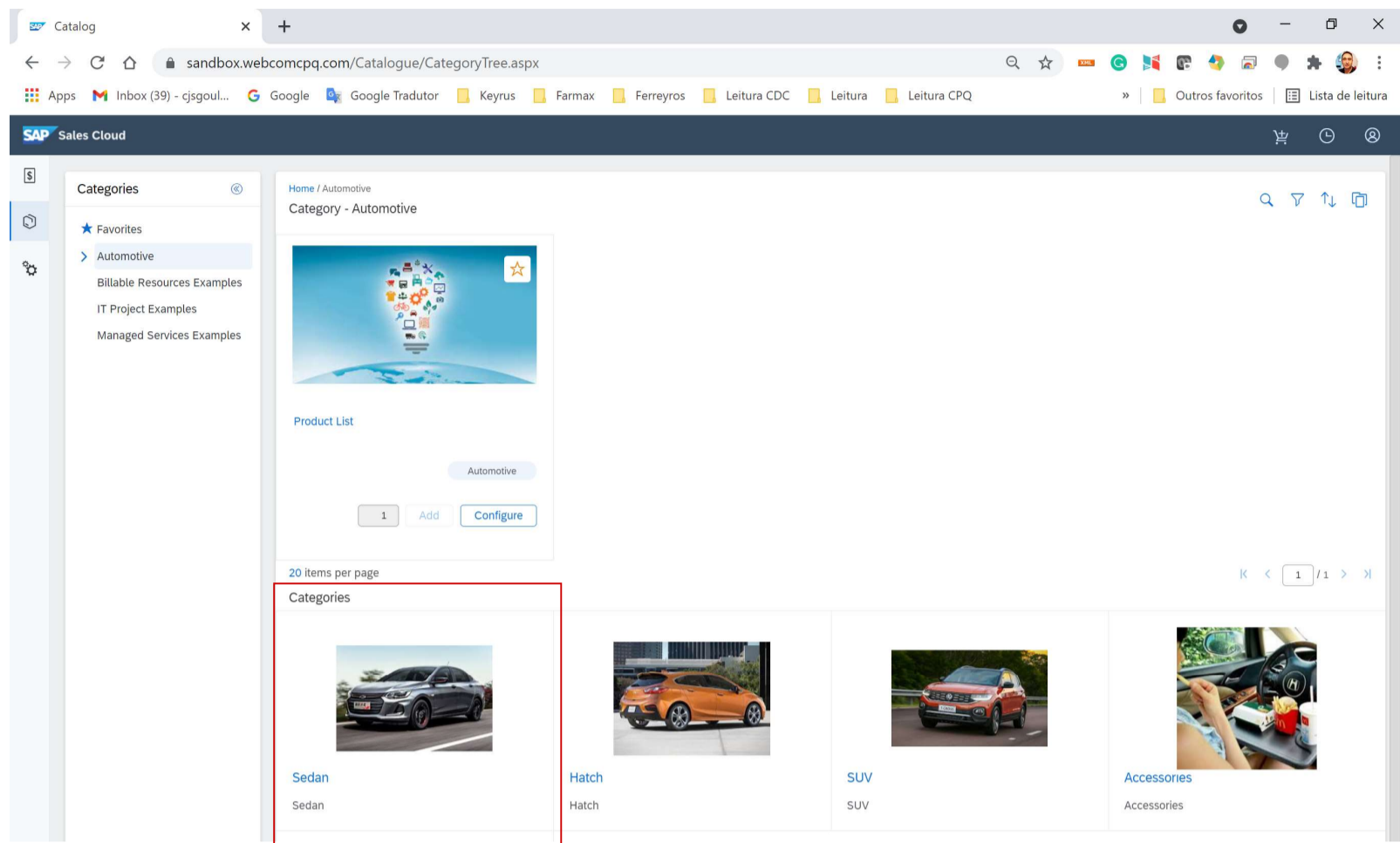
Testing the Quote with those fields. Select the Category Automotive below



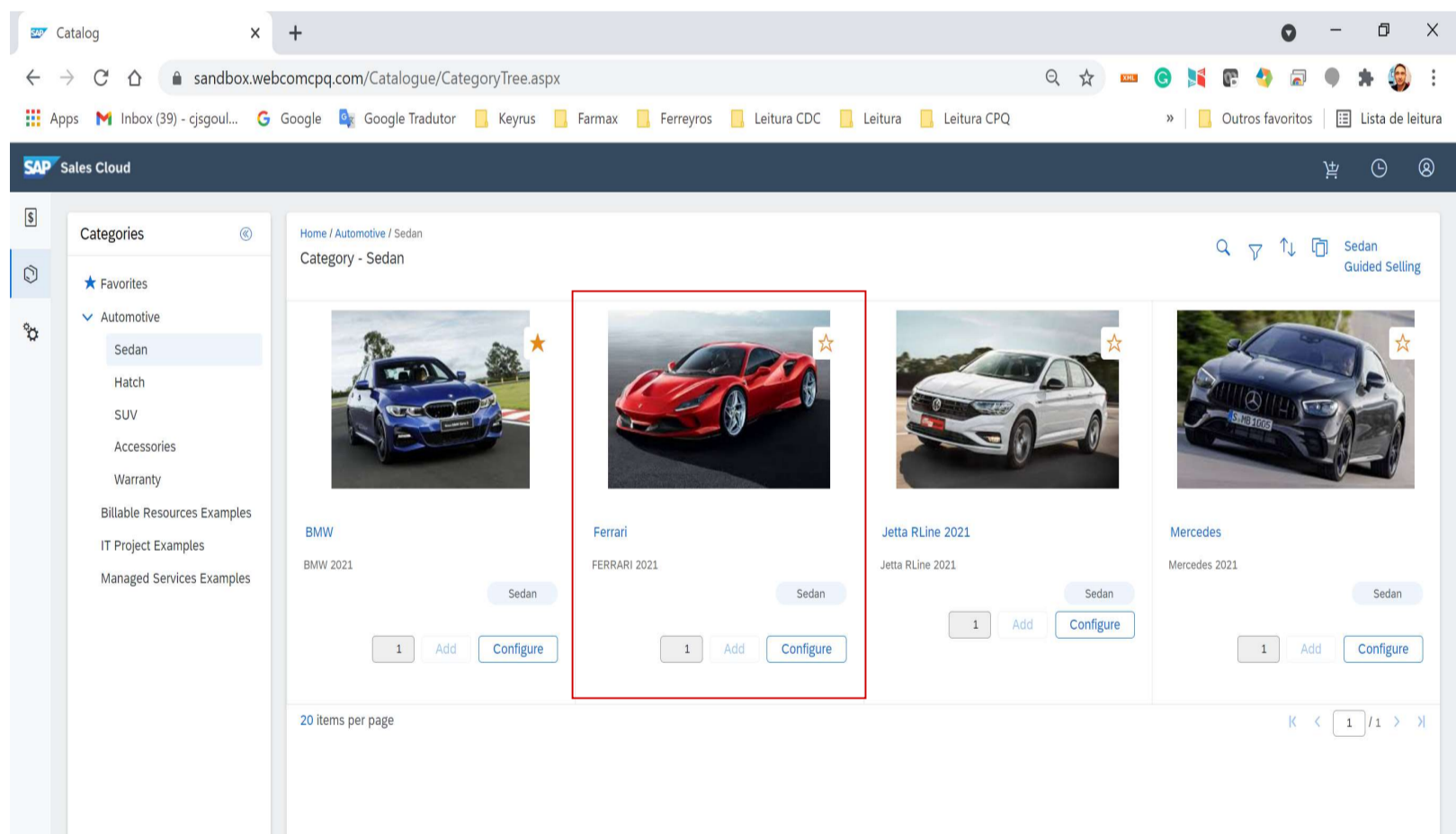
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Choose the Subcategory “Sedan”



Then, choose the product “Ferrari”

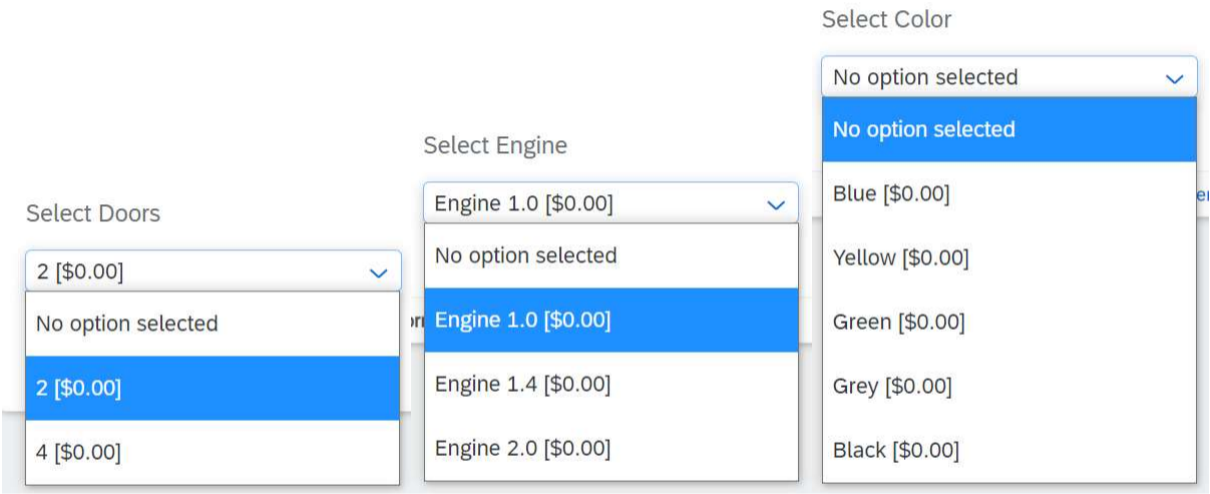
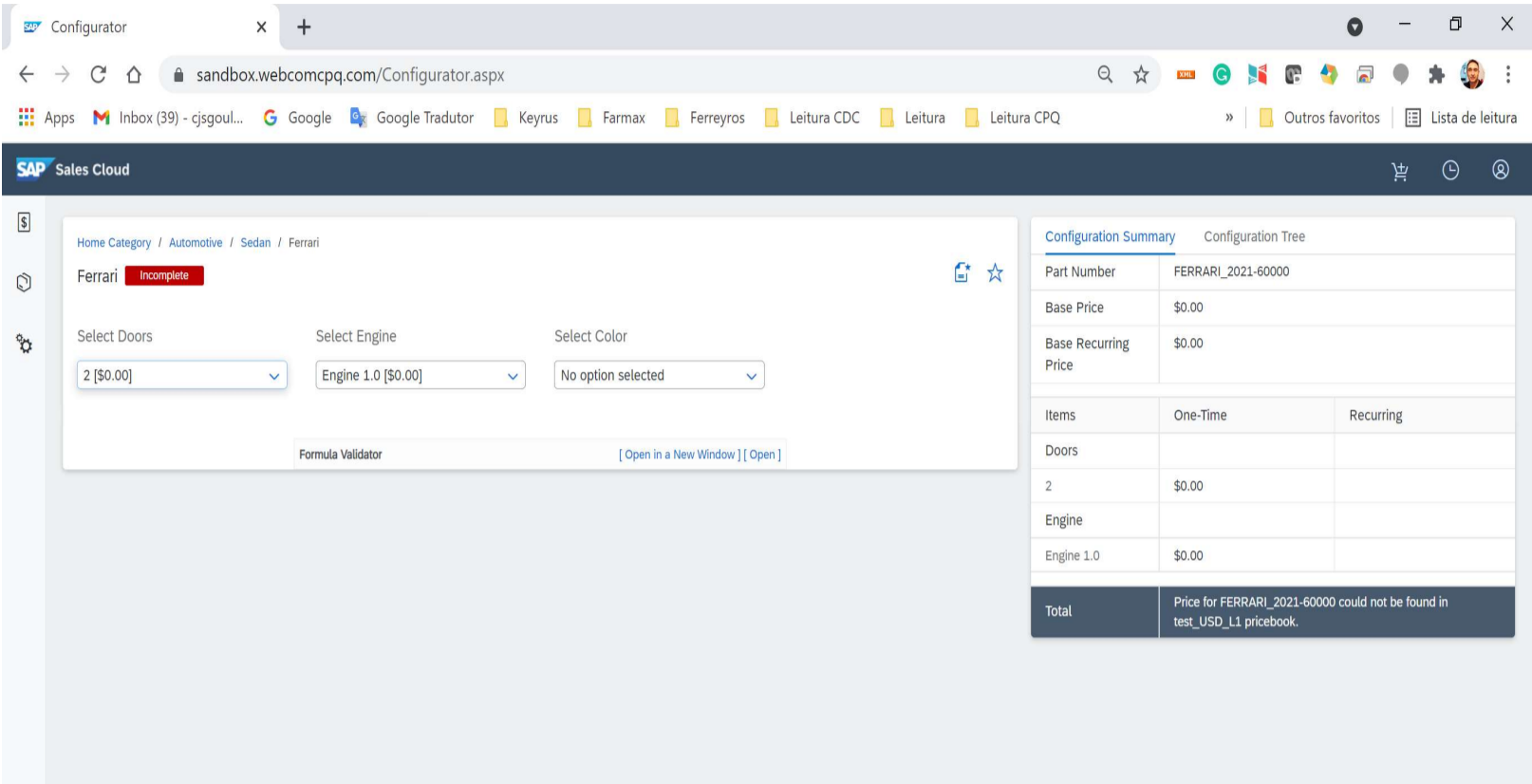


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Remember, Ferrari is a configurable product, which means, I can specify personal accessories.

The fields mentioned above are available with all data below. Remember it, there is no validation, checks or restriction so far.



1.3. Creating Formula Rules to Restrict Options during the Quotation

Now, I will create the fields restriction, increase the data quality, and improve the Sales Process.

Customer Requirements

- It's possible have car with 2 or 4 doors
- The cars with 2 doors, I have Engines with 1.0 and 1.4
- The cars with 4 doors, I have Engines with 2.0

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In the “Rules and Messages” will be listed all rules that were created to accomplish the Customer requirements

Products > Jetta RLine 2021

Definition

Pricing

Attributes

Rules and Messages

Scripts

Layout

Advanced Settings

Formula Rules

Attribute Trigger

Simple Rules

Product Messages

Add Rule

Ranking

Import/Export

Filter by name, condition, action or description

Advanced Search

Actions	Name	Condition	Action	Rank	Description	Active	Modified Date	Modified By
<div>Edit</div> <div></div>	WithoutColor	[NOT](<*IFANYVAL...	<*RESETATTRIBUT...	0		Yes	08/16/21	Claudio Goulart
<div>Edit</div> <div></div>	CheckDoor4Engine	<*IFANYVALUE(Do...	<*DISALLOWALLVA...	0	Check Door4 Engine	Yes	08/16/21	Claudio Goulart
<div>Edit</div> <div></div>	CheckDoor2Engine	<*IFANYVALUE(Do...	<*DISALLOWALLVA...	0	Check Door2 Engine	Yes	08/16/21	Claudio Goulart

Showing

10

/ 3 items

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<

Page

1

/ 1

>

>>

The rule “WithoutColor” reset the field if there is no Door Selected

Jetta RLine 2021 » Edit

Products > Jetta RLine 2021

Definition

Pricing

Attributes

Rules and Messages

Scripts

Layout

Advanced Settings

Formula Rules

Attribute Trigger

Simple Rules

Product Messages

Name (required)

WithoutColor

Description

Start Date

End Date

Rank

0

Created by

Claudio Goulart 8/16/2021 4:17:23 PM

Modified by

Claudio Goulart 8/16/2021 4:25:44 PM

Rule Definition

Condition (required)

[NOT](<*IFANYVALUE(Doors:2,Doors:4)*>)

Action (required)

<*RESETATTRIBUTE(Color)*>

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The rule below “CheckDoor4Engine” check if the door is 4, then, disable the engines 1.0 and 1.4

Jetta RLine 2021 » Edit

Products > Jetta RLine 2021

DefinitionPricingAttributesRules and MessagesScriptsLayoutAdvanced Settings

Formula RulesAttribute TriggerSimple RulesProduct Messages

Name (required)

CheckDoor4Engine

Description

Check Door4 Engine

Start Date

Start Date

End Date

End Date

Rank

0

Active

Active

Created by

Claudio Goulart 8/16/2021 10:17:52 AM

Modified by

Claudio Goulart 8/16/2021 2:50:54 PM

Rule Definition

Condition (required)<IFANYVALUE(Doors:4)*>

Action (required)<*DISALLOWALLVALUESEXCEPT(Engine:Engine_2_0)*>

The rule CheckDoor2Engine check if the door 2 was settled, if it is, will be available engines 1.0 and 1.4

Jetta RLine 2021 » Edit

Products > Jetta RLine 2021

DefinitionPricingAttributesRules and MessagesScriptsLayoutAdvanced Settings

Formula RulesAttribute TriggerSimple RulesProduct Messages

Name (required)

CheckDoor2Engine

Description

Check Door2 Engine

Start Date

08/02/21

End Date

08/31/21

Rank

0

Active

Created by

Claudio Goulart 8/16/2021 10:15:44 AM

Modified by

Claudio Goulart 8/16/2021 2:51:01 PM

Rule Definition

Condition (required)<IFANYVALUE(Doors:2)*>

Action (required)<*DISALLOWALLVALUESEXCEPT(Engine:Engine_1_0|Engine_1_4)*>

1.4. Creating Rules to restrict data availability

Now, I will use “Simple Rules” to restrict the Color Black for the cars which have only 2 doors

Jetta RLine 2021 » Edit

Products > Jetta RLine 2021

Definition

Pricing

Attributes

Rules and Messages

Scripts

Layout

Advanced Settings

Formula Rules

Attribute Trigger

Simple Rules

Product Messages

Add Simple Rule

Ranking

Filter by name

Advanced Search

Actions	Name	Condition	Action	Rank	Description	Modified Date	Modified By
<div>Edit</div> <div></div>	RuleDoor2_OnlyBlack	Doors:2	Allow Color : Black	0	RuleDoor2_OnlyBlack	08/16/21	Claudio Goulart

Showing

10

/ 1 items

Page

1

/ 1

That rule is simple, and it will make available only the color Black for 2 Doors cars.

Jetta RLine 2021 » Edit

Products > Jetta RLine 2021

Definition

Pricing

Attributes

Rules and Messages

Scripts

Layout

Advanced Settings

Formula Rules

Attribute Trigger

Simple Rules

Product Messages

Rule name (required)

RuleDoor2_OnlyBlack

Description

RuleDoor2_OnlyBlack

Start Date

08/02/21

End Date

08/31/21

Rank

0

Created by

Claudio Goulart on 8/16/2021 3:01:02 PM

Modified by

Claudio Goulart on 8/16/2021 3:01:02 PM

Rule Definition

If

Add Values

Doors:2

Then

Allow

Allowed Values

Add Values

Color:Black

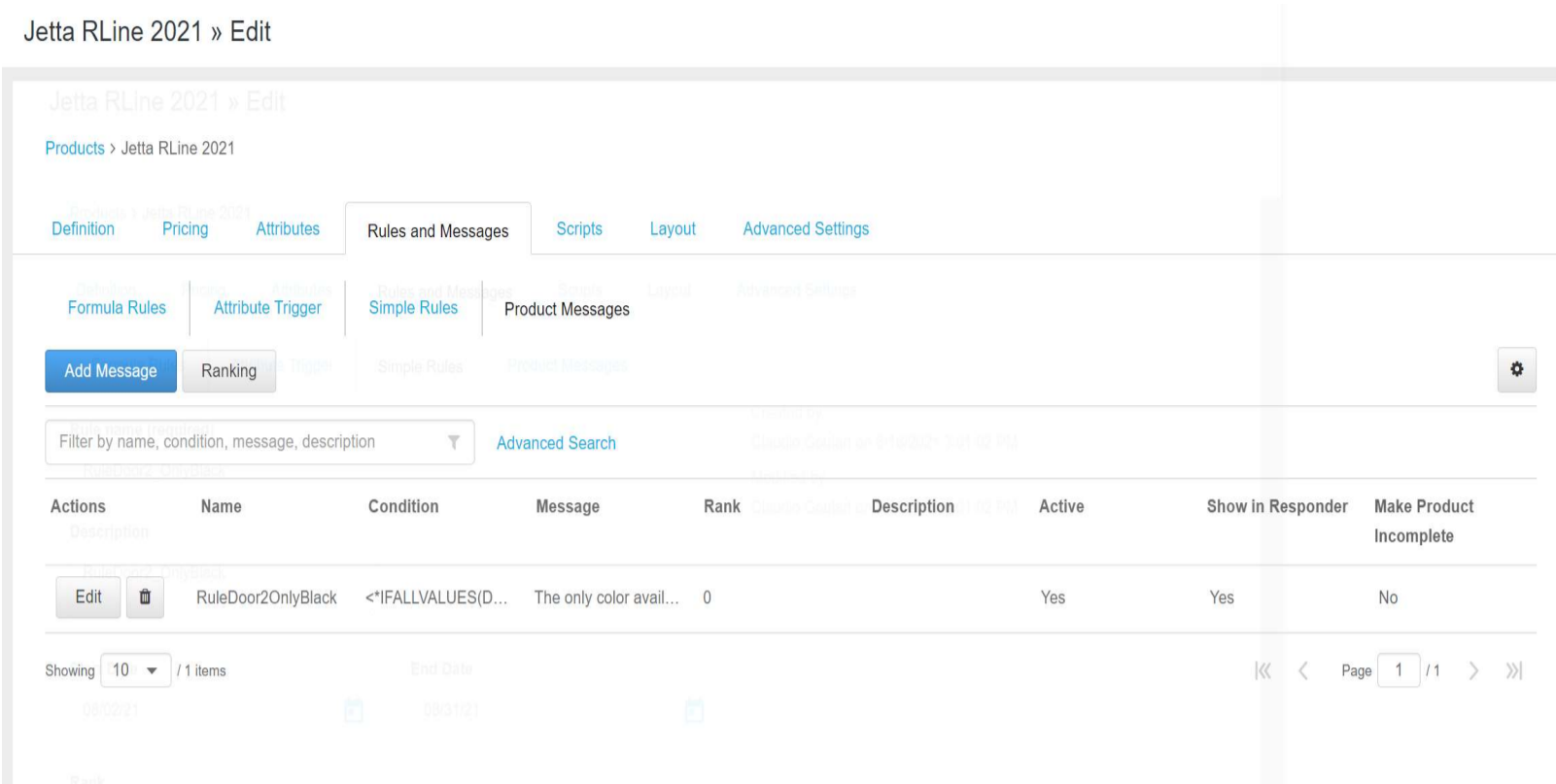
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Email: claudio.goulart@modulocrm.com.br

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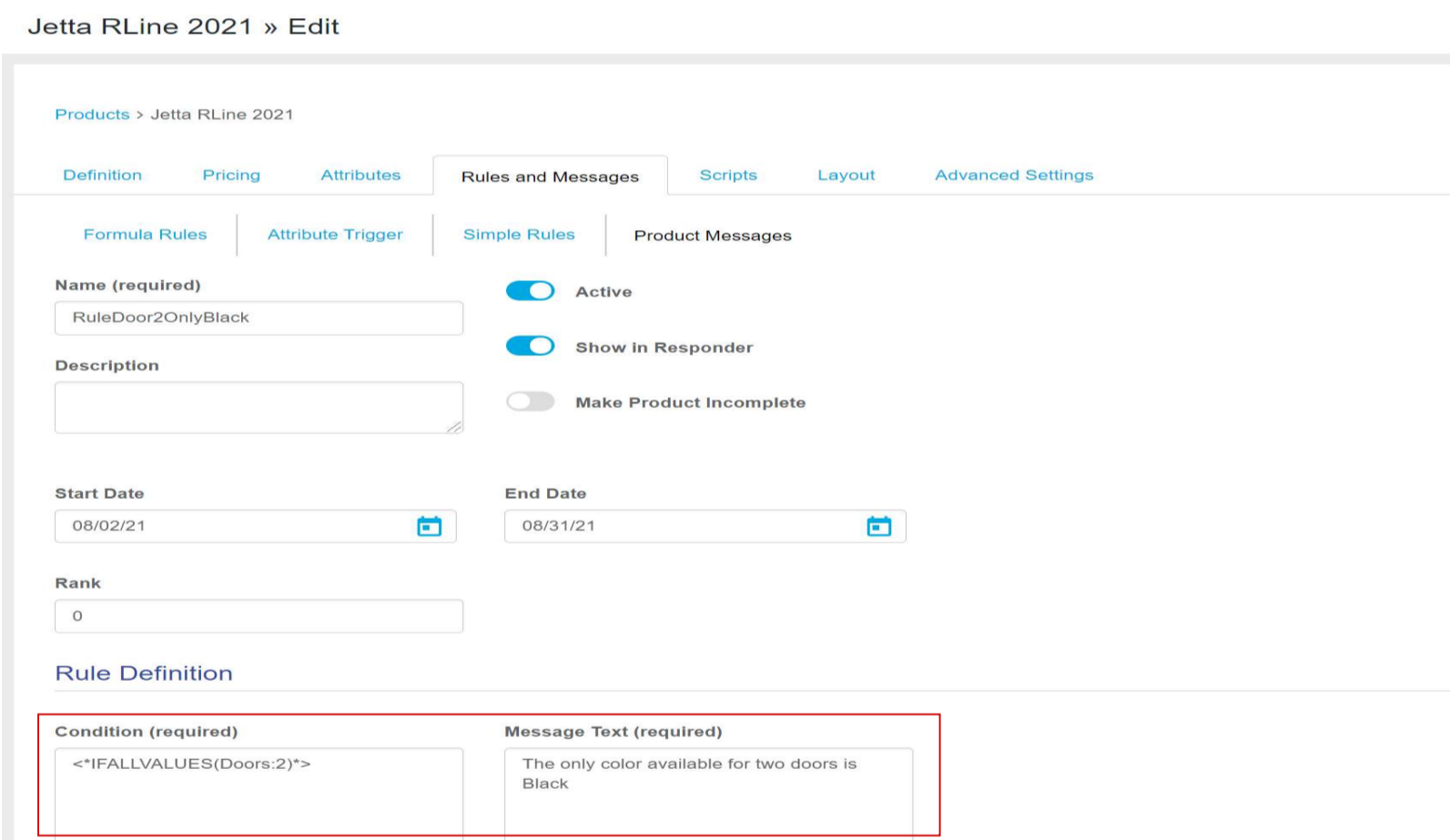
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Site: www.modulocrm.com.br

1.5. Creating rules to exhibit messages to the Sales Rep

Now, I need to inform the user that only black cars will be available for Cars with 2 Doors.



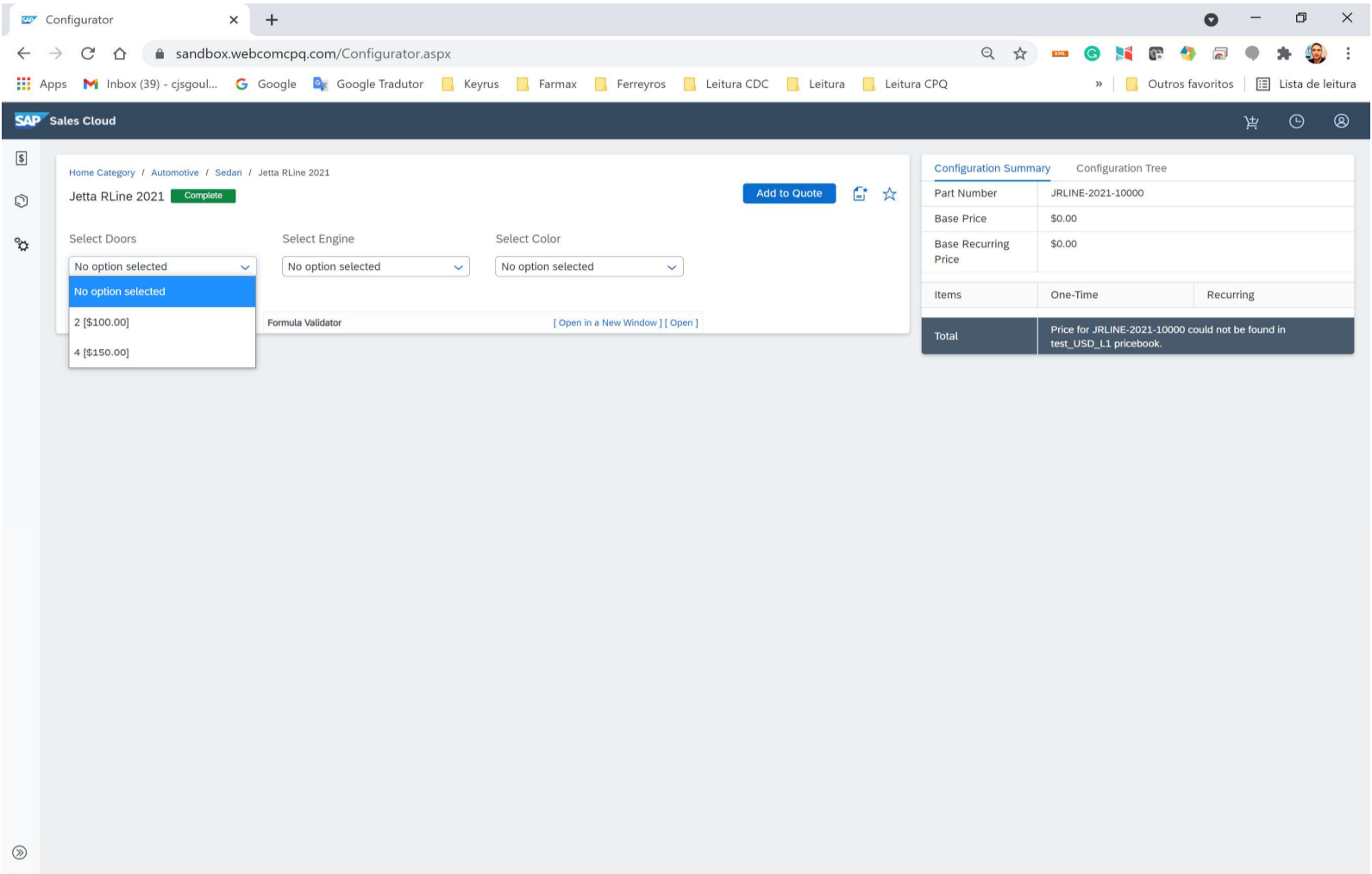
If the field 2 doors were chosen, will be exhibit a message “The only color available for two doors is Black”.



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1.6. Testing the rules during a Quotation

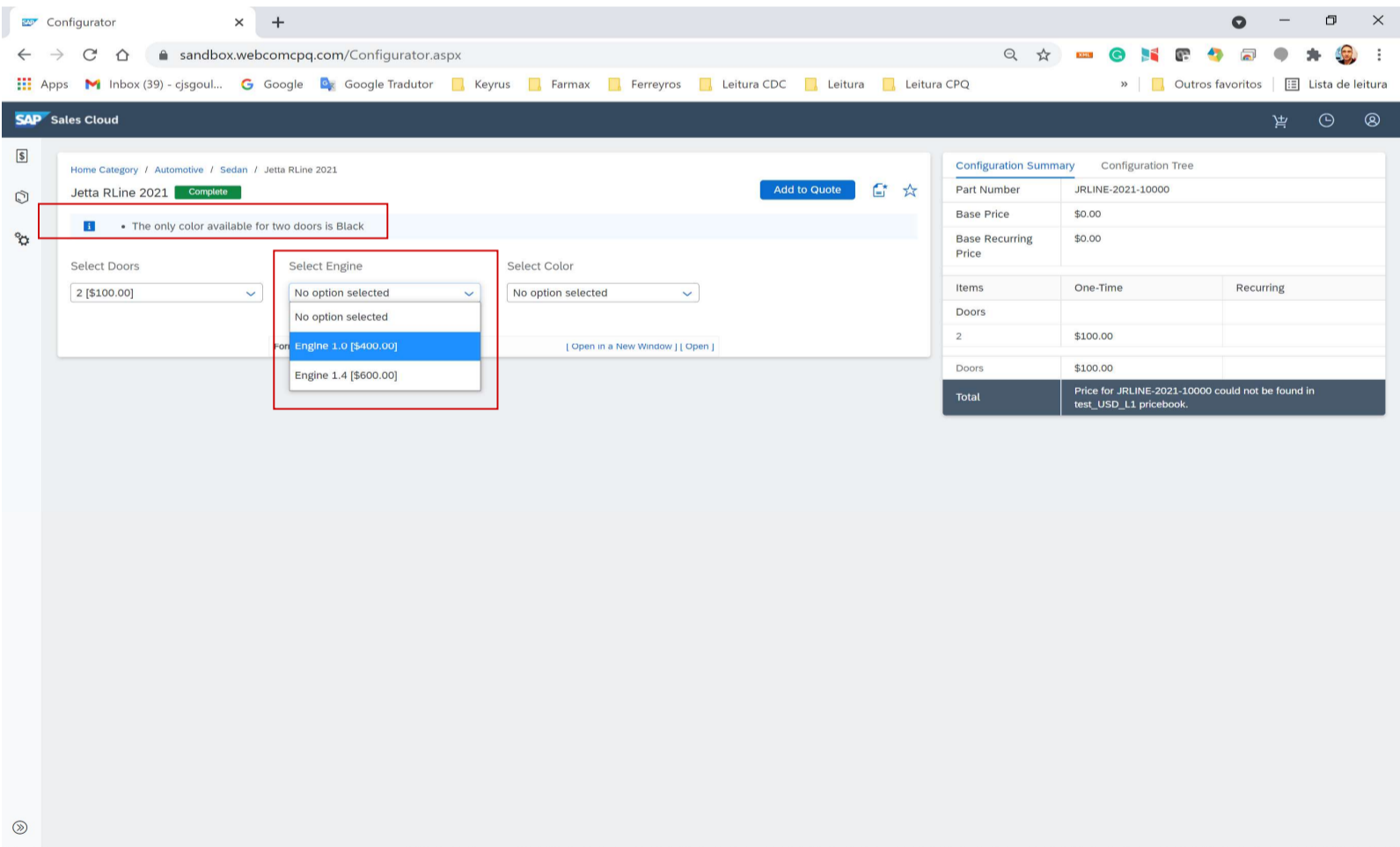
Now, Let’s test our configuration. First, let’s select a Car’s door.



I will choose first, cars with only 2 doors. Check the fields Engine.

Only Engines 1.0 and Engines 2.0 are available.

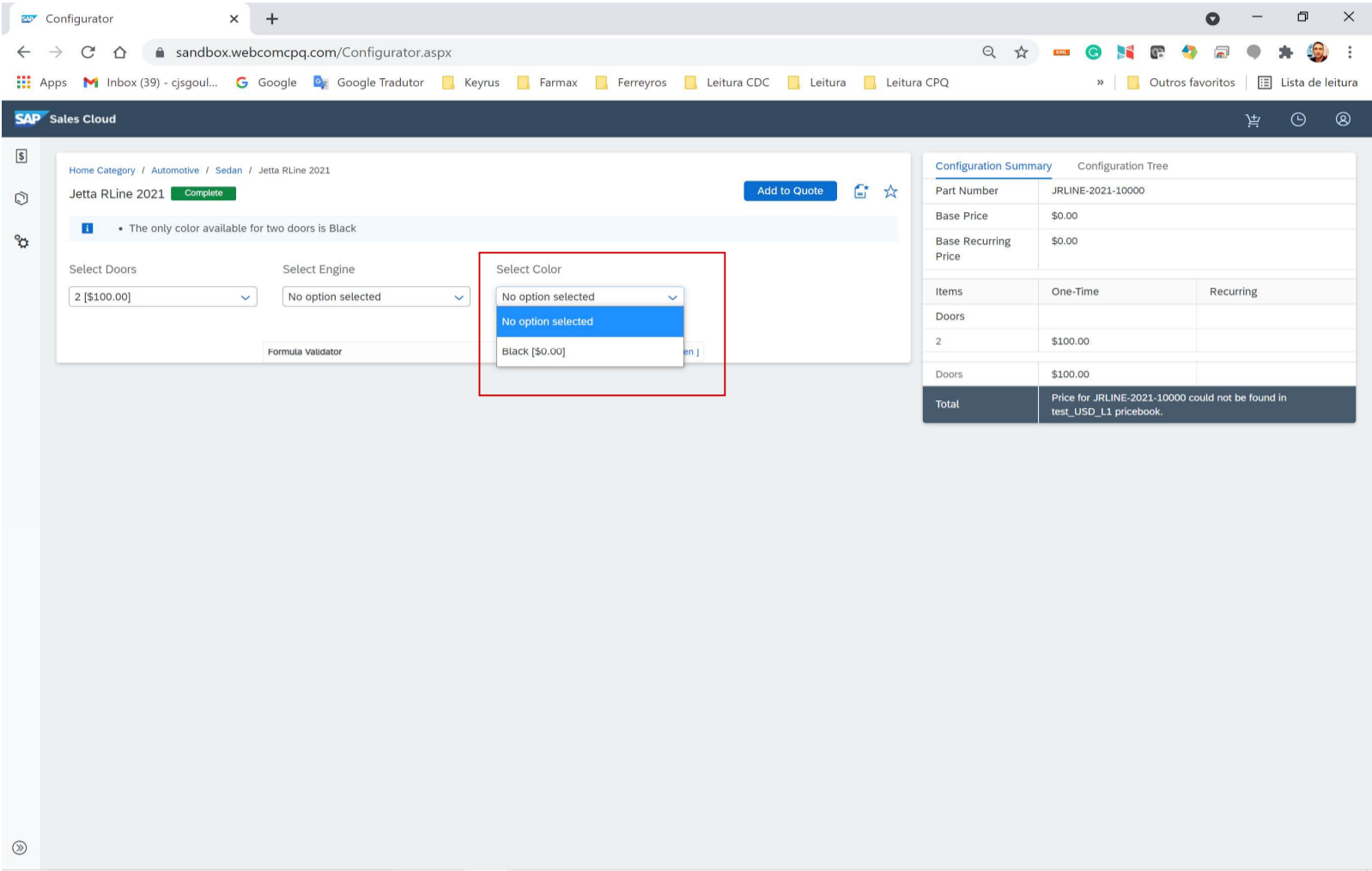
The informative message is exhibiting “The only color available for two doors is Black”



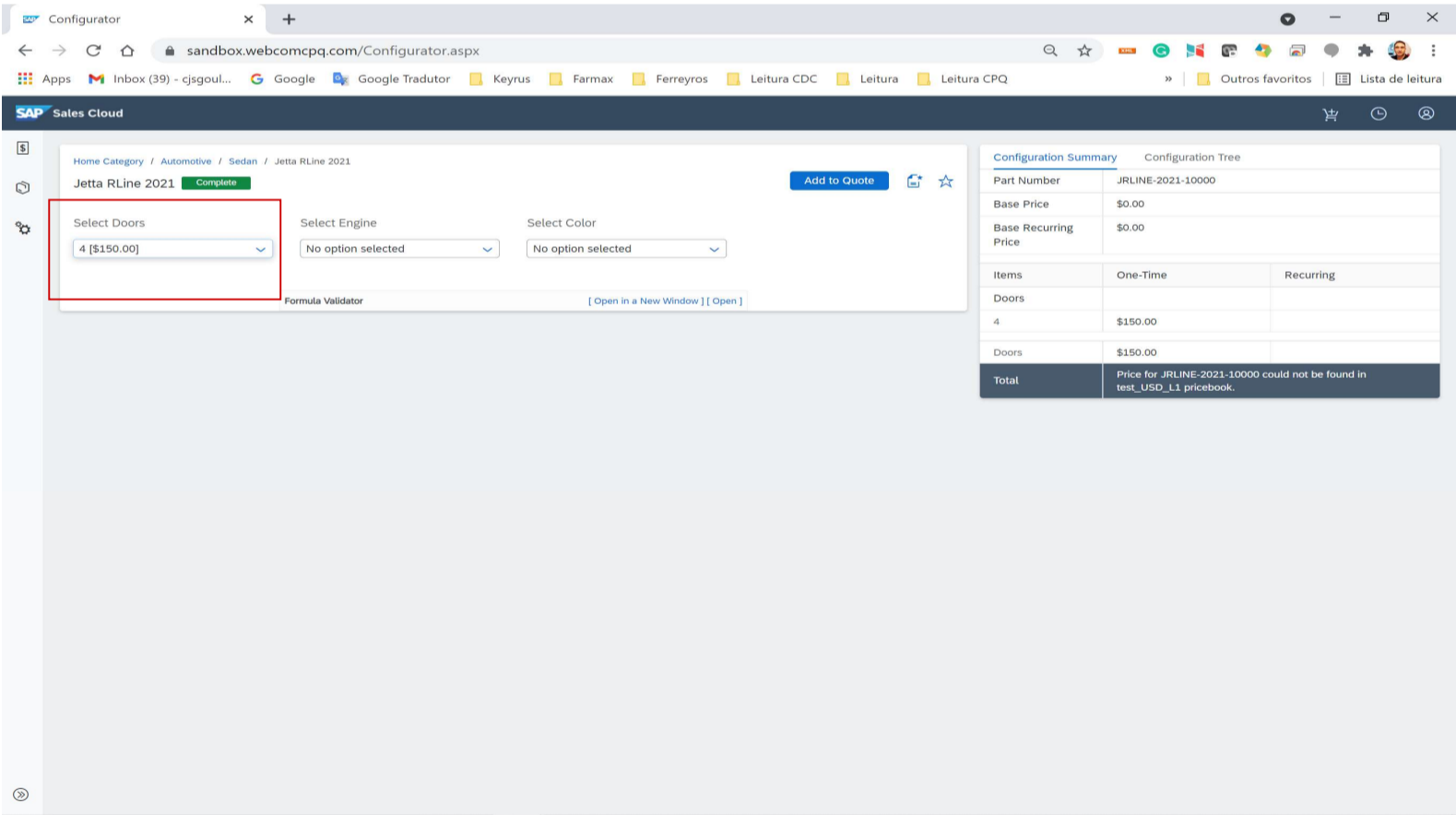
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Only the color Black is available for sale.



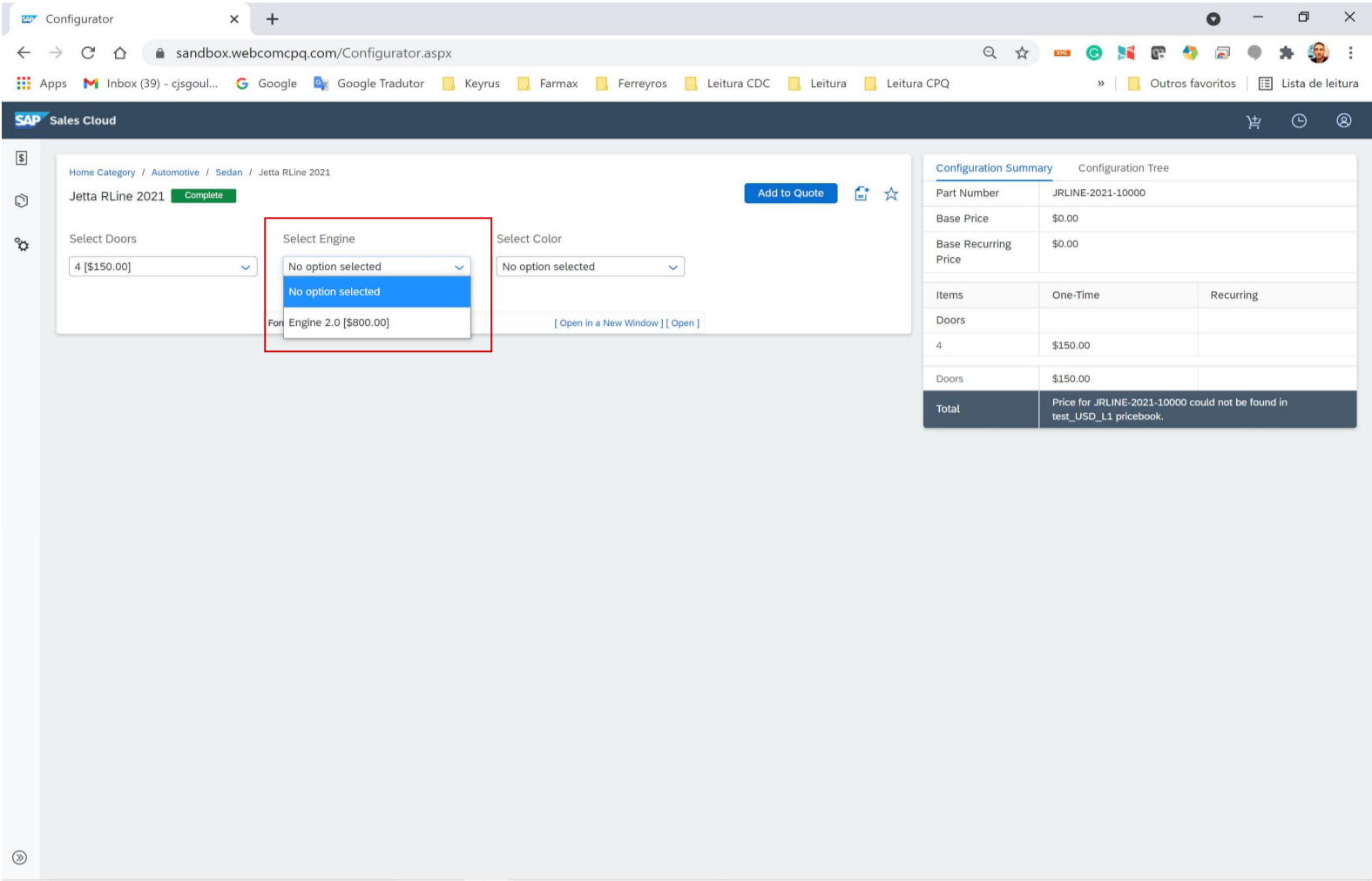
Now, I will select the 4 car's door



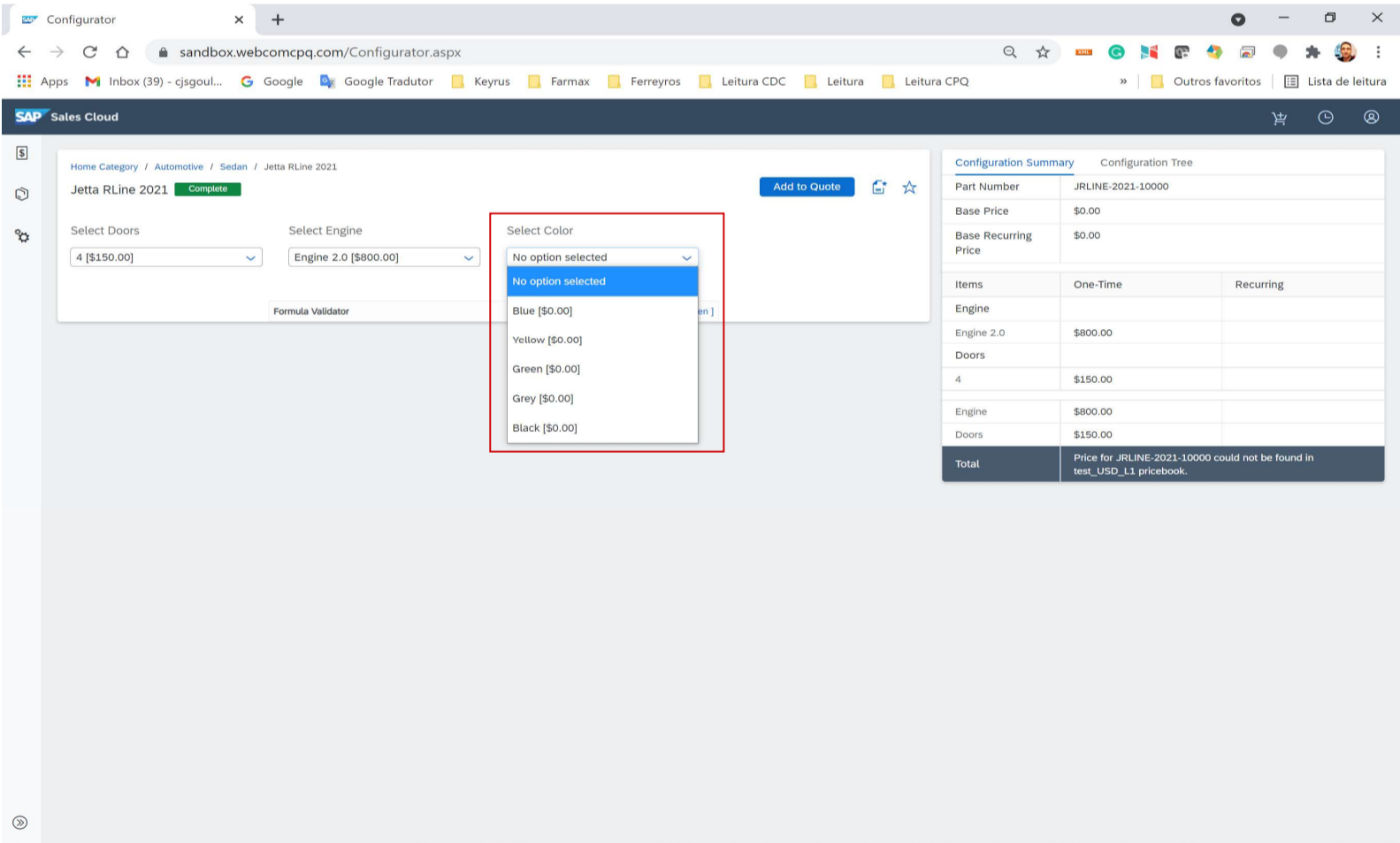
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The field engine has only 2.0 option



With the 4 Car's doors, there is no color restriction, then, the sales rep can choose all colors available below.



Despite all the power of rules, SAP CPQ – Callidus can use Phyton Scripts to provide complex validation. But that's subject for another article.

I hope you enjoy it folks!!