Credex CPQ & Billing Solution Guide

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Document Revisions

Date	Version	Author(s)	Document Changes
19-Sep-2023	1.0	Credex Technology	Initial version
11-Oct-2023	1.2	Credex Technology	Customizable Template, Discount Approvals, E-Signature

Contents

1 Credex CPQ (Configure, Price, Quote) & Billing Solution

1.1 Introduction

Welcome to the Credex-CPQ User Guide: Your Path to Smoother Sales Success!

Simplify your Quote-to-Cash journey with Credex-CPQ. Imagine easily configuring products, generating accurate quotes, and Invoices by placing orders, sealing deals – all with precision and speed.

Automated Ease: Credex-CPQ takes the hassle out of sales. It guides you through product setups and automates quote creation, saving time and reducing errors.

Precision Matters: Get pricing right every time. Credex-CPQ ensures accurate quotes that match customer needs, enhancing trust and reliability.

Faster, Confident Sales: Close deals faster with Credex-CPQ's streamlined process. Spend less time on paperwork and more on building strong customer relationships.

Seamless Salesforce Harmony: Credex-CPQ smoothly integrates with your Salesforce setup, creating a unified platform for efficient sales management.

1.2 Objective

With Credex CPQ & Billing Solution, you'll be able to easily manage a quote-to-cash cycle with just a few clicks and analyze all of your sales data in one place. The interactive product catalog makes it easy for your sales team to find the right products and configures price & quantities on the fly.

Streamlined Quote to Cash lifecycle

Interactive product catalog for easy navigation

Increased efficiency with quantity and price configuration feature

Generate multiple quotes for various opportunities at a time.

Quote to Order transition with one click

One-click customized document generation using dynamic templates

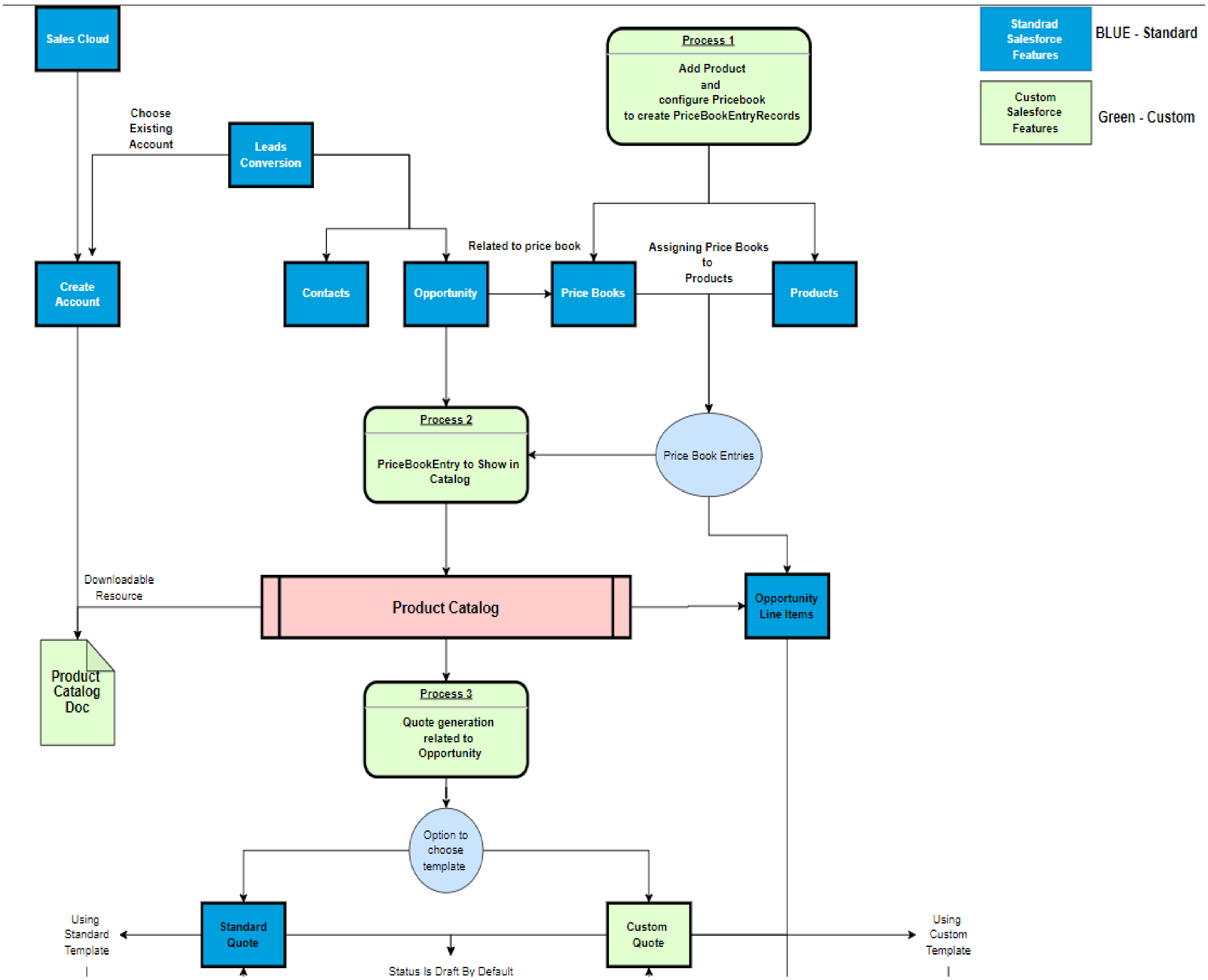
Discount approval

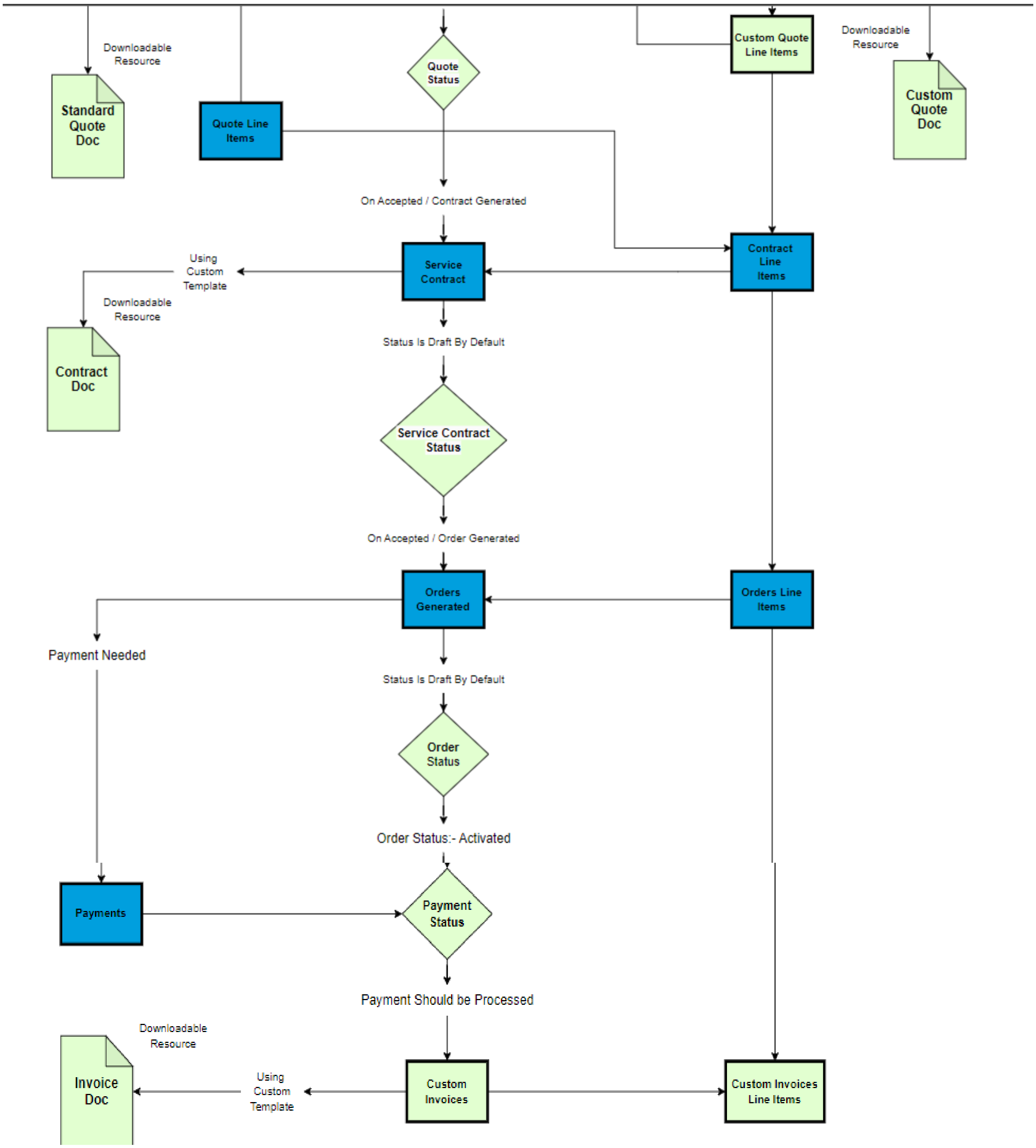
E-signature

2 Scope

Introducing our app, created to efficiently and easily streamline the quote-to-cash life cycle with return orders capabilities. For a smooth end-to-end process, produce quotations and docs, manage products and orders, and handle return orders all in one step.

3 Data Flow Diagram





For better reference of flow :-

https://viewer.diagrams.net/index.html?tags=%7B%7D&highlight=0000ff&edit=_blank&layers=1&nav=1&title=Flow%20Diagram%20CredexCPQ#Uhttps%3A%2F%2Fdrive.google.com%2Fuc%3Fid%3D1R_gekTzYoAlbG0WZ7hYD4LTUbE-dAowk%26export%3Ddownload

4 Prerequisite and Post-Requisite Installation Step

Prerequisite Steps:

Enable Quotes:

- Navigate to Setup -> Quotes.
- Enable the Quotes feature.

Post-Prerequisite Steps:

1. ***Enable Path Settings***:
    - Go to Setup -> Path Settings.
    - Enable path settings for guided user experiences.

2. ***Assign User to CPQ Permission Set:***
    - Go to Setup -> Permission Sets.
    - Select "CPQ Permissions."
    - Manage Assignments -> Add Assignment -> Select User.

3. ***Assign Page Layouts:***
    - Go to Setup -> Object Manager.
    - For "Account," "Contact," "Opportunity," "Pricebook," "Product," "Quote," "Quote Line Items," "Service Contract," "Contract Line Items," "Order," and "Payment":
    - Navigate to Page Layouts.
    - Page Layout Assignment -> Edit Assignment.
    - Select your Profile.
    - Choose the appropriate page layout ("Cred" Page Layouts) to use.

4. ***Assign Compact Layout:***
    - Go to Setup -> Object Manager -> "Product."
    - Compact Layout -> Compact Layout Assignment -> Edit Assignment.
    - Choose the "Cred" Compact Layout to use.

5. ***Create Templates: Create the following templates:*** ***Refer to point 4 (Templates)***
    - Quote Template
    - Contract Template
    - Invoice Template

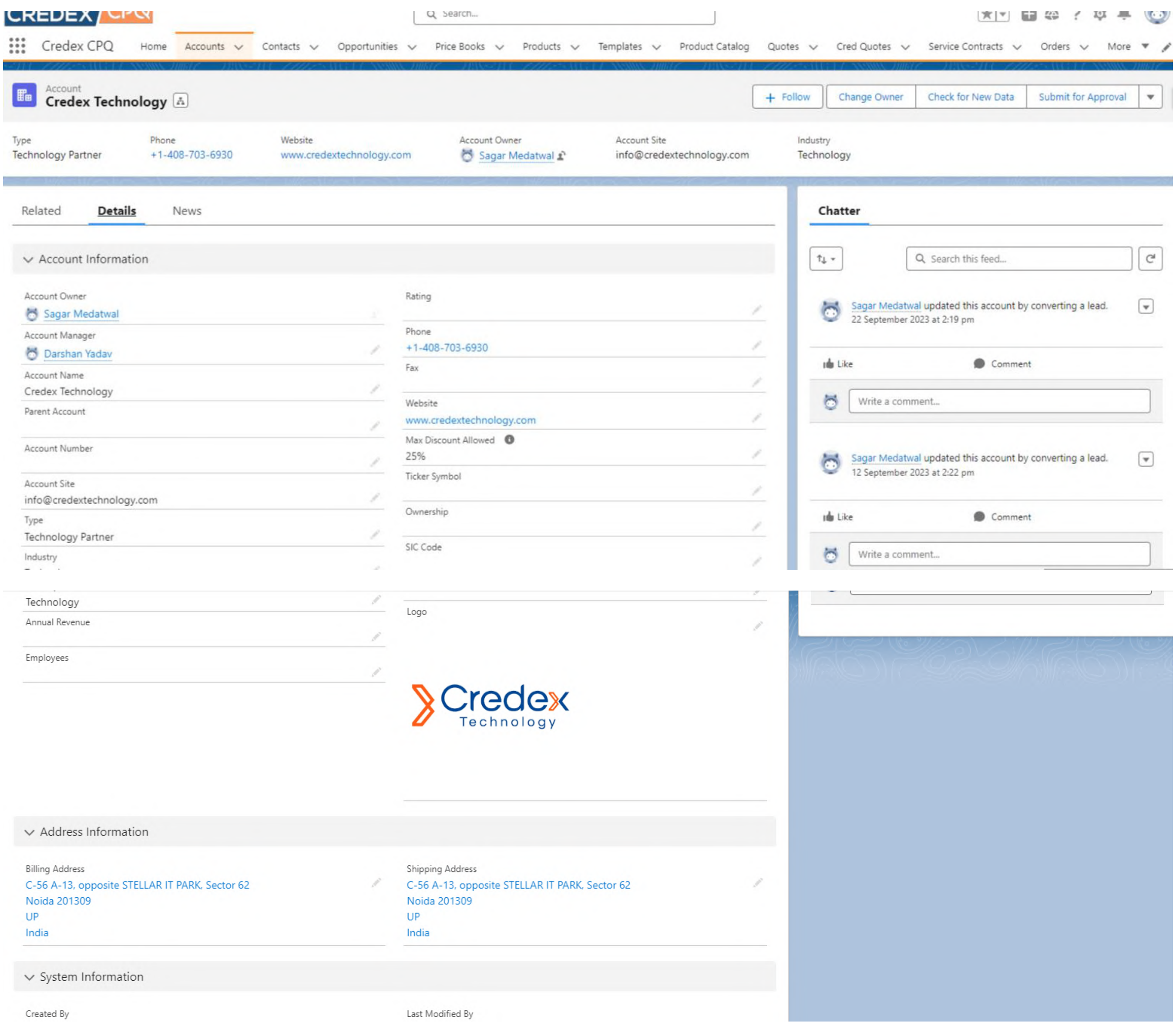
6. ***Configure Approval Process:*** ***Refer to point 6 (Discount Approval Process)***
    - Set up the approval process configurations as per the steps mentioned below.

7. ***Setup E-Signature:*** ***Refer to point 7 (DocuSign Setup)***
    - Configure E-Signature settings to enable electronic signatures as required.
    - It must be same as per instruction given, to activate e-sign feature.

5 Key Credex-CPQ Features / Elements

5.1 Account

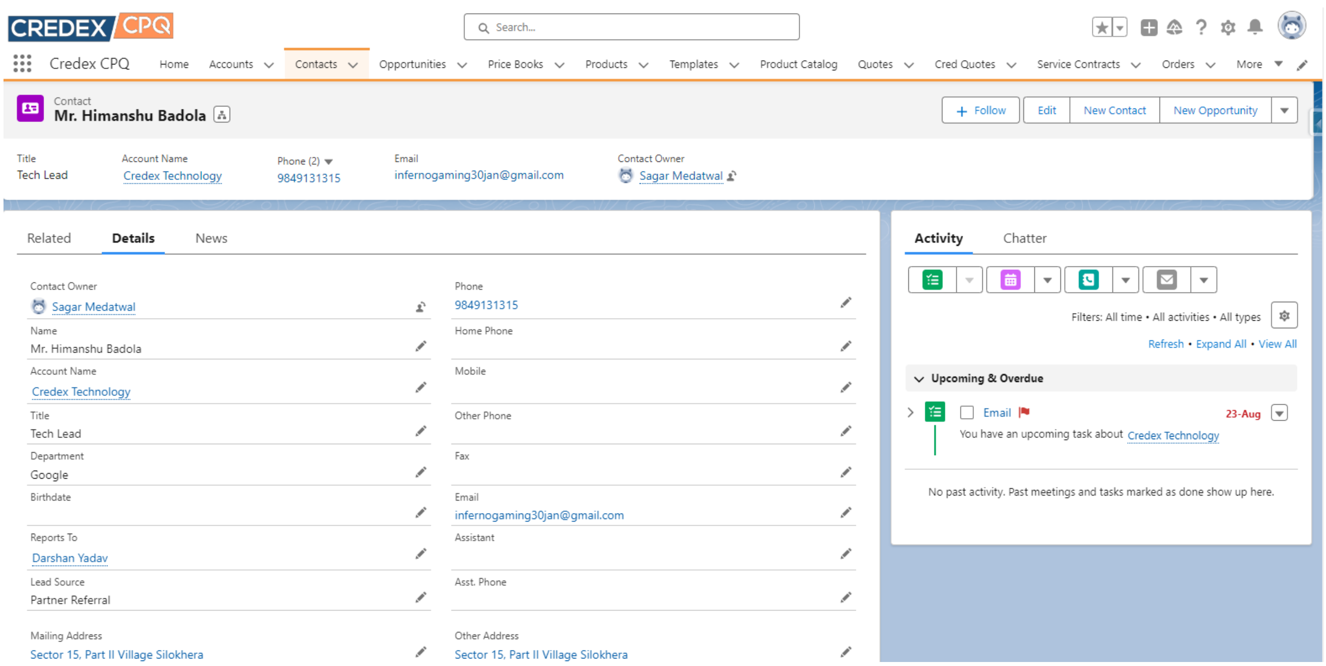
In Salesforce, the Account object serves as a comprehensive repository of information about a company or client. Here's a breakdown of how the Account object functions and why it's crucial:



- The Account object in Salesforce serves as a central repository to store information about your company, which is referenced to templates as its header or footer. This includes fundamental data such as company name, contact information, Industry, physical address, Logos and website address.
- At the point of lead conversion or when working with opportunities, you have to choose an existing one if the lead or opportunity is associated with an existing company or client.

- When generating a quote, it's important to accurately attribute it to the correct information. By associating the quote with the relevant Account, you ensure that the quote is tied to the right company, maintaining clarity and accountability in your records.
- Accounts can be linked to related objects like Contacts (customers related to the company) and Opportunities (potential sales deals), allowing for efficient relationship management.
- Each account in the app has a designated Account manager field which stores the reference of the user assigned as manager to that account.
- An essential field in the account object is the "Max Discount Allowed," indicating the maximum discount that can be offered for any deal, related to that account**,** which triggers the Discount Approval process, *for more reference navigate to 5.0.*

5.2 Contact



Contact object stores the information about a client or customer. When dealing with quotes, leads, or opportunities, you often need to gather essential details about the customer.

- From contact we take references of various fields information for the template data such as the Name , Phone , Account and Opportunity (it is related to), Mailing and Shipping(other) address, Emails , Titles and Department.
- Contacts must have a related Account as well as an opportunity for which the quotes should be prepared for.

5.3 Opportunities

Opportunity object stores the information about any deals related to that customer and account.

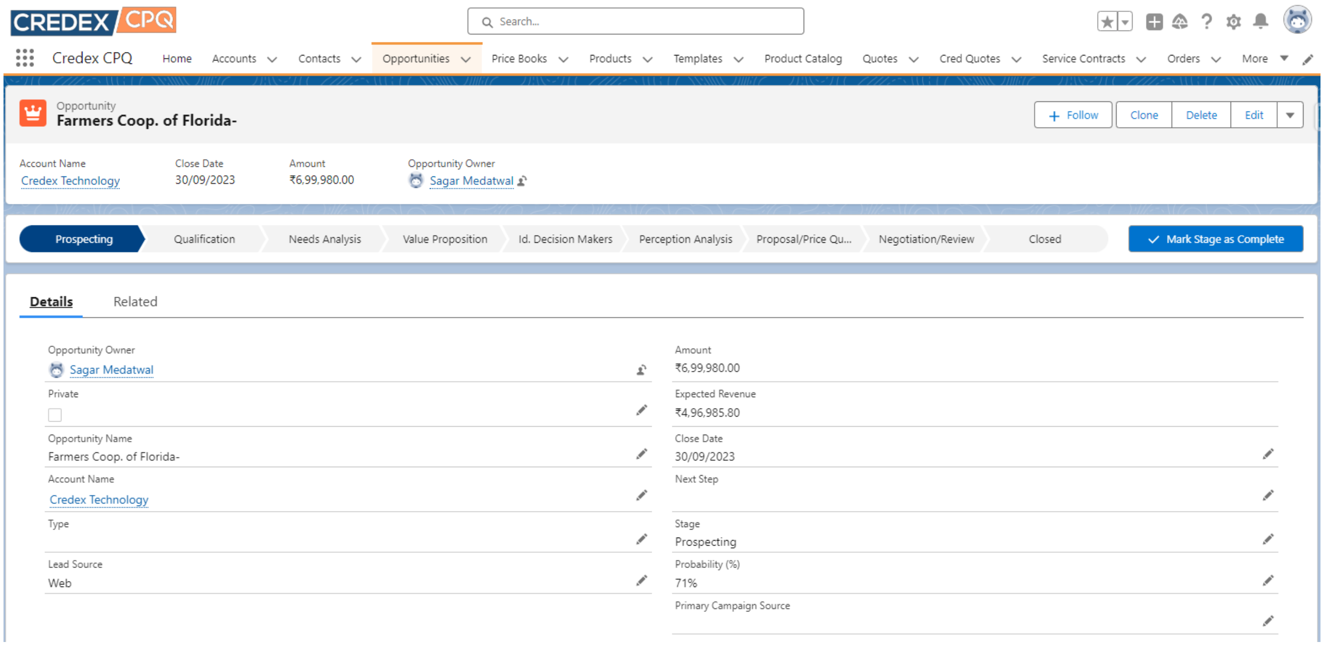
It should be related to the same Account.

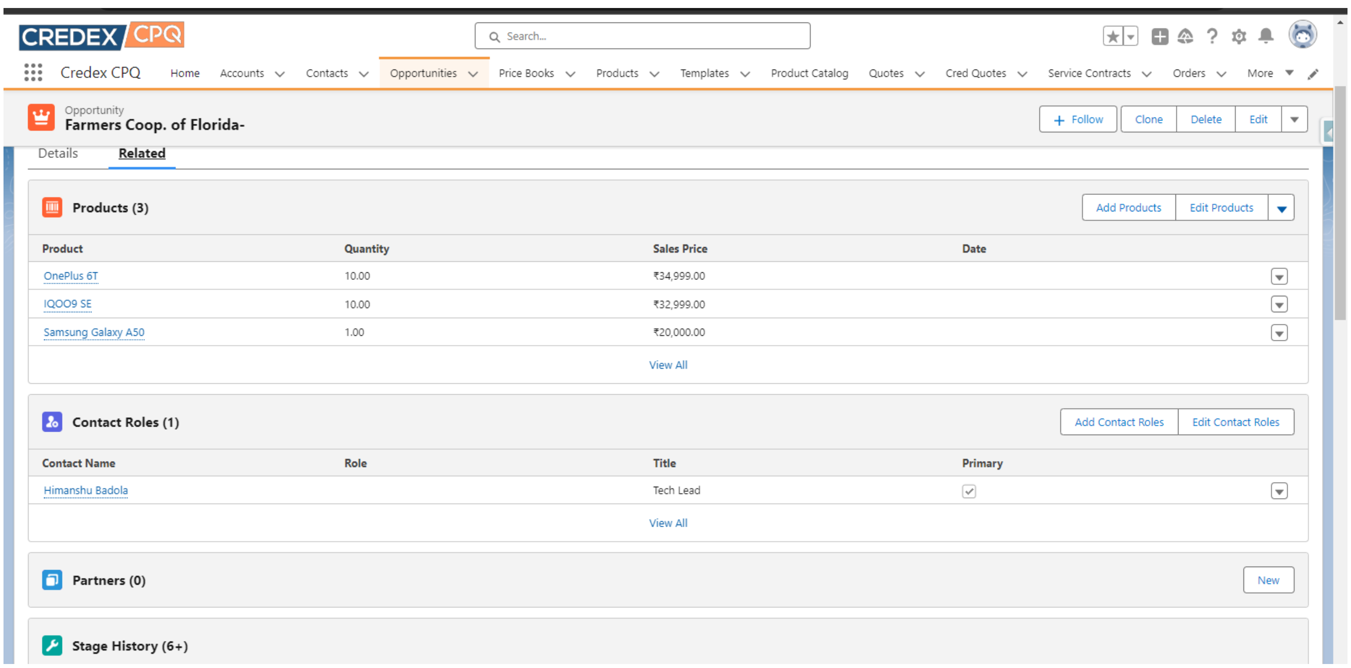
It stores important information which concludes in sales data.

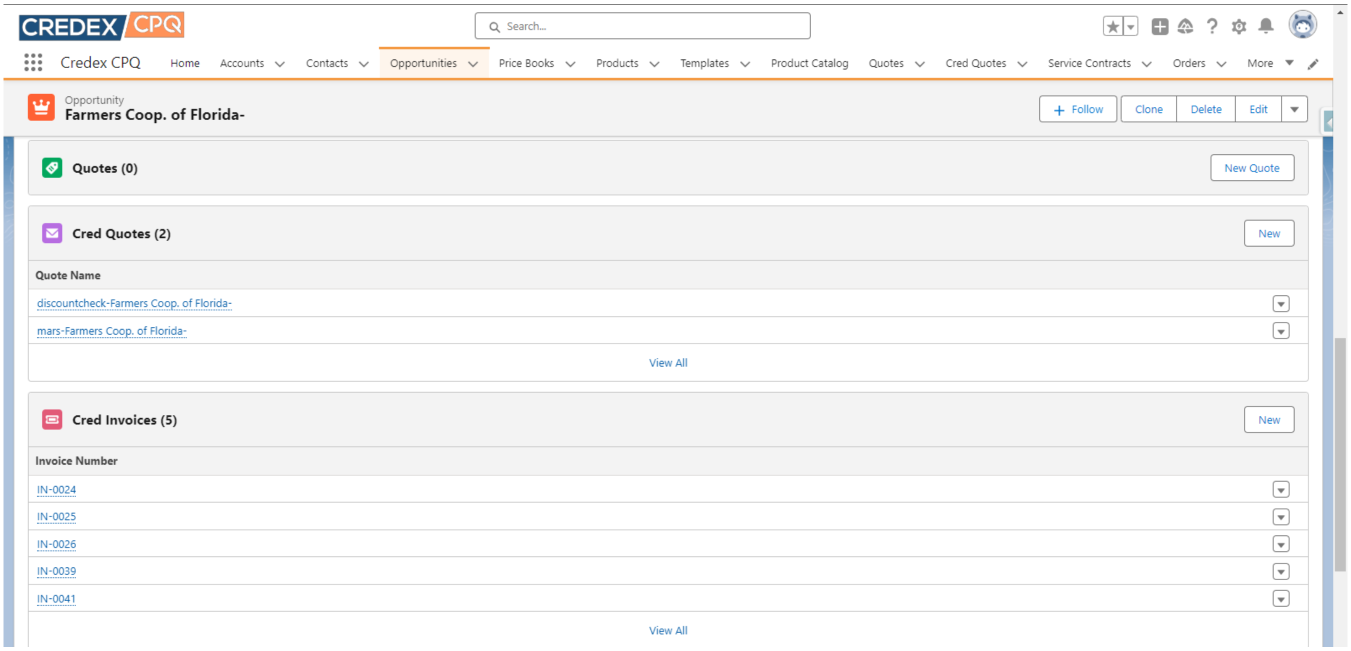
Every Opportunity must have a Contact and Account associated with it.

When creating Opportunities in Salesforce, you can associate a specific Price Book to determine the products and their prices relevant to that deal.

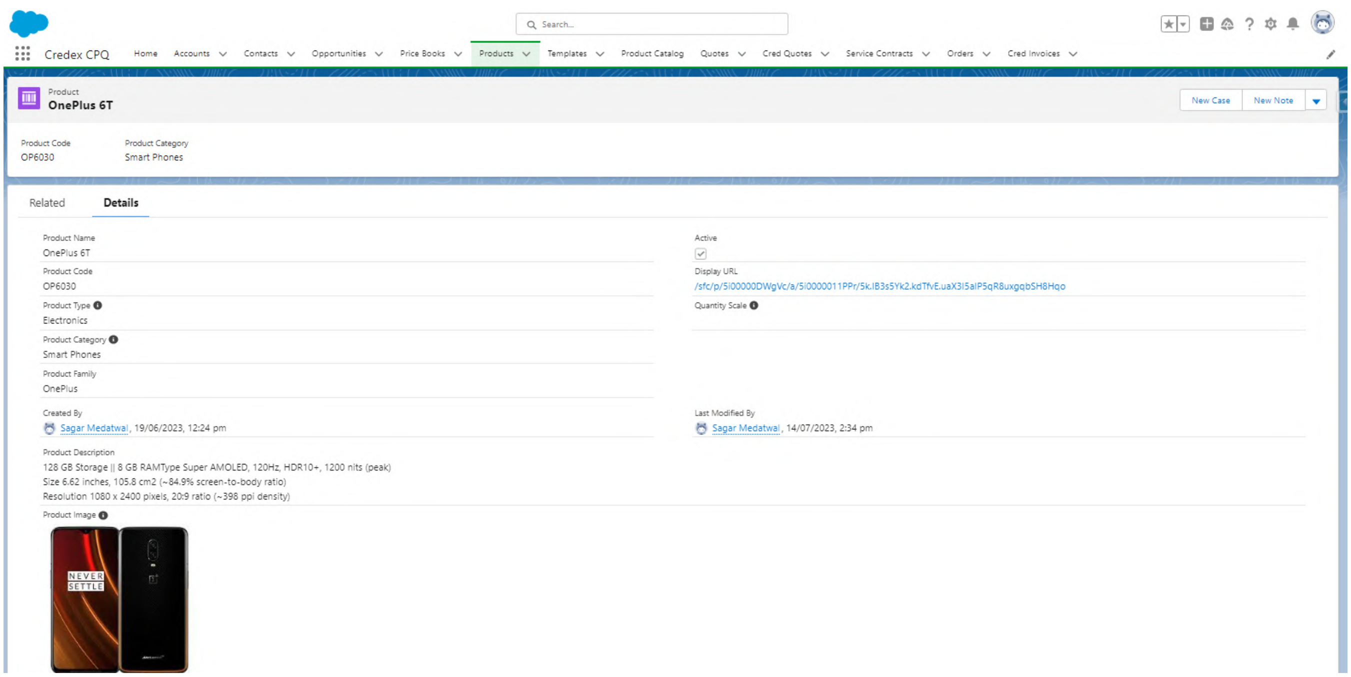
All the general information of Quotes, Contracts as well as the invoices are available on their related records.







5.4 Products



The Product object in Salesforce serves as a fundamental component of managing your organization's products and services within the Salesforce platform.

It centralizes product-related information from which we take references of the required field to showcase it on the product Catalog as well as on the Templates and store that information on their related line items.

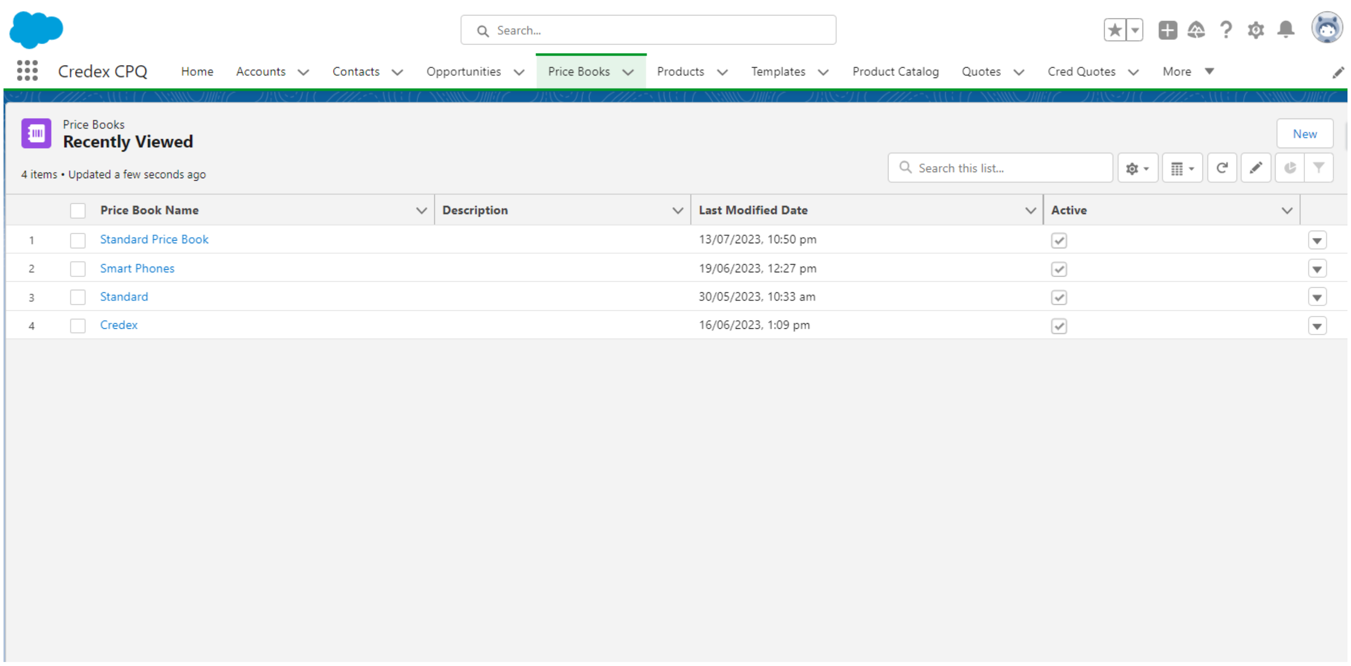
- Product Type field stores the type under which the product category falls under.

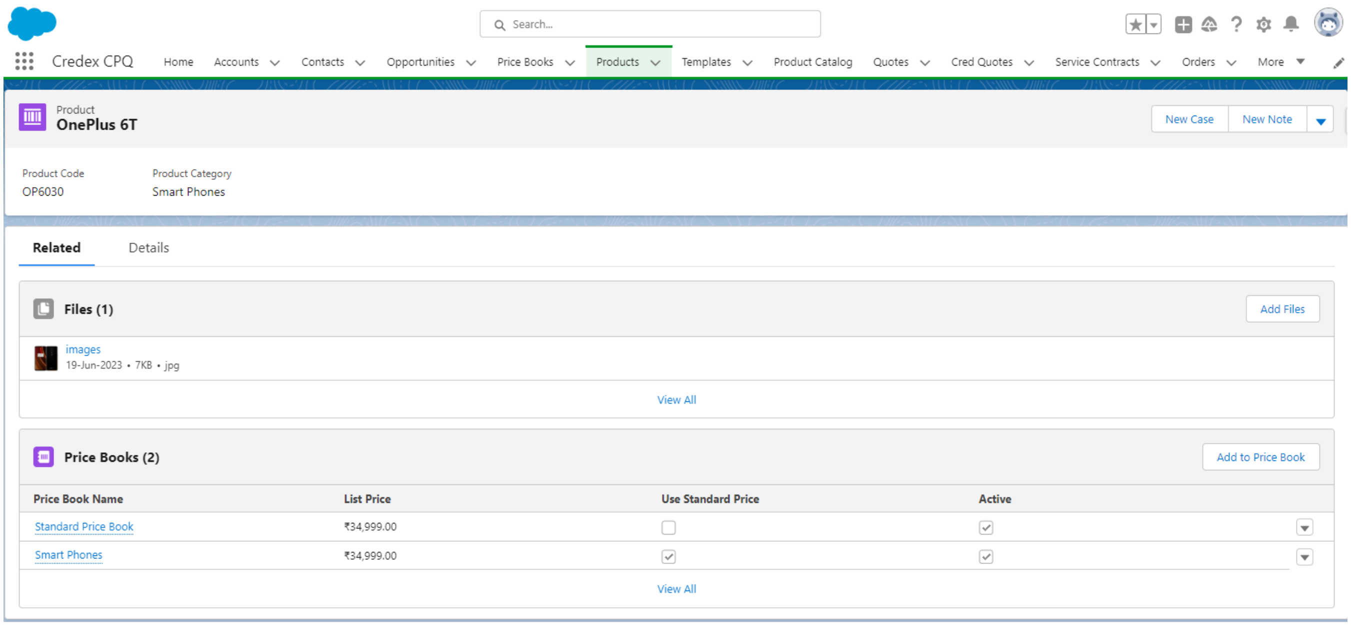
- Product Category field consists of categories under which the product comes depending upon the type of product is selected.
- Product Family it shows the different product brands or its families.
- Product Image fields store the image of the related Products/Services.
- Active checkbox decides whether the product is available or unavailable.

These above fields are used on the product catalog interface in order to showcase the product filters to categories accordingly.

Products are often associated with Price Books, which define the pricing structure for different groups of customers or market segments.

5.5 PriceBooks

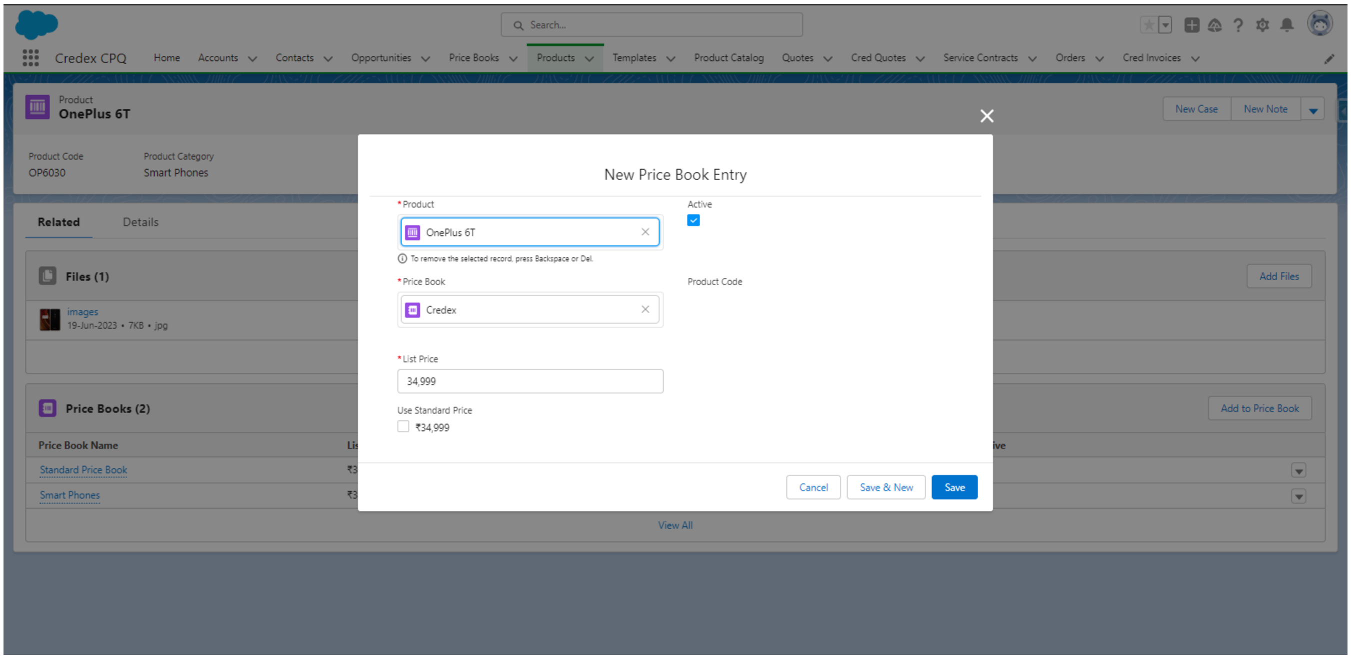




Price Books in Salesforce are essential tools for managing and controlling product pricing and availability for different customer segments or scenarios.

- Price Book is a collection of products with associated prices, allowing you to define unique pricing structures for various customer groups, or sales channels.
- Every Salesforce organization has a default Standard Price Book, which acts as a baseline for product pricing and serves as a reference for other Price Books.
- In addition to the Standard Price Book, you can create custom Price Books to accommodate specialized pricing for specific customer segments or market conditions, which can be used to filter out the product catalog, for the specific opportunity or deal.
- Each opportunity must be related to the pricebook, so the products can be assigned for the related deals.
- Price Books allow you to control which products are visible and available to specific users, ensuring that sales teams see only relevant products.

5.6 PriceBookEntries

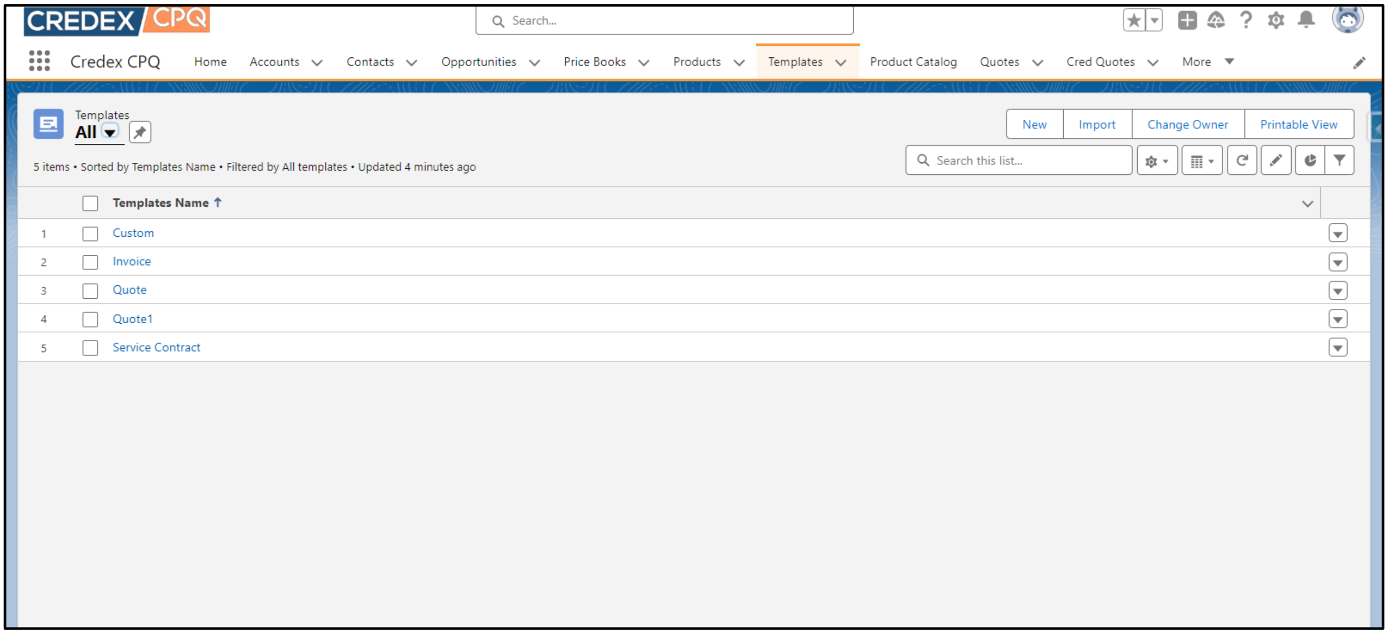


A Price Book Entry represents the association between a specific product and a particular Price Book. It holds information such as the product's price, currency, quantity, and availability dates.

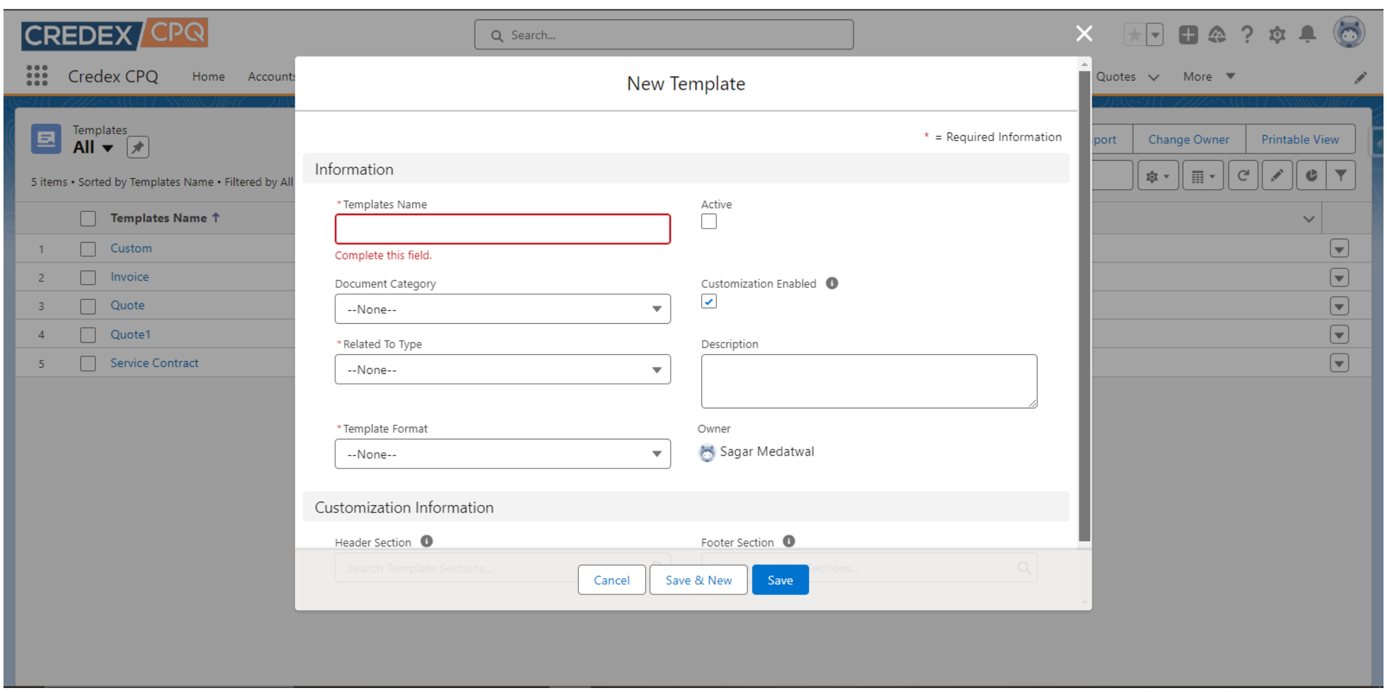
Price Book Entries define the price at which a product is offered within a specific Price Book. This allows for customized pricing based on different customer groups or scenarios.

- A single product can have multiple Price Book Entries, each associated with different Price Books. This flexibility enables tailored pricing.
- We can add different prices of products and can offer them to customers or groups as well as decide their availability with Active checkbox.

5.7 Templates



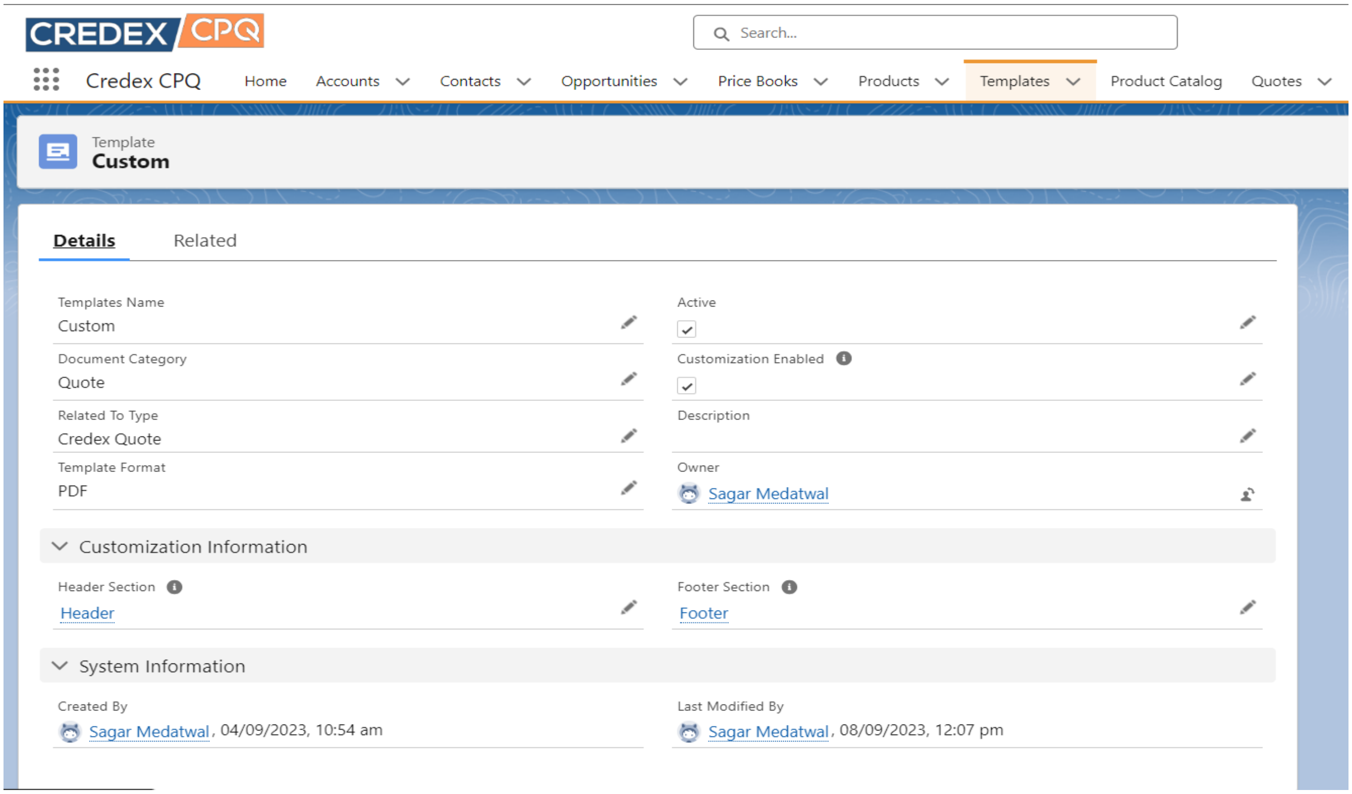
On clicking New Template:-



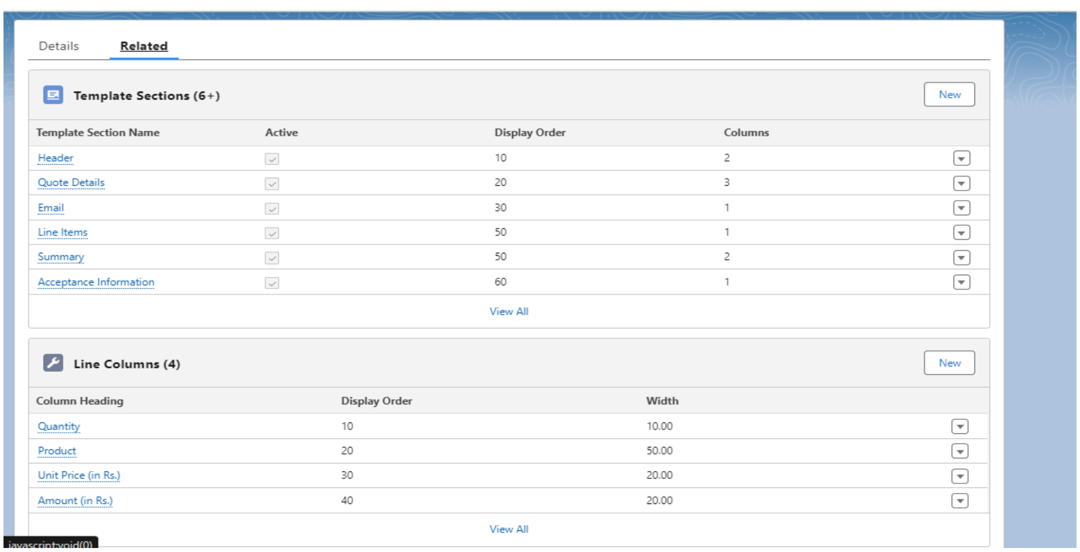
Templates Object stores different template information such as quote, contract and invoice which can be generated as a PDF (other available formats as well).

- Related to Type field stores the reference of the object where it will be available for use.
- Active checkbox (will decide the activation of templates).
- Template format field shows the format of the document that will be generated.
- Document Category field value should be similar to the object for which it will be used.

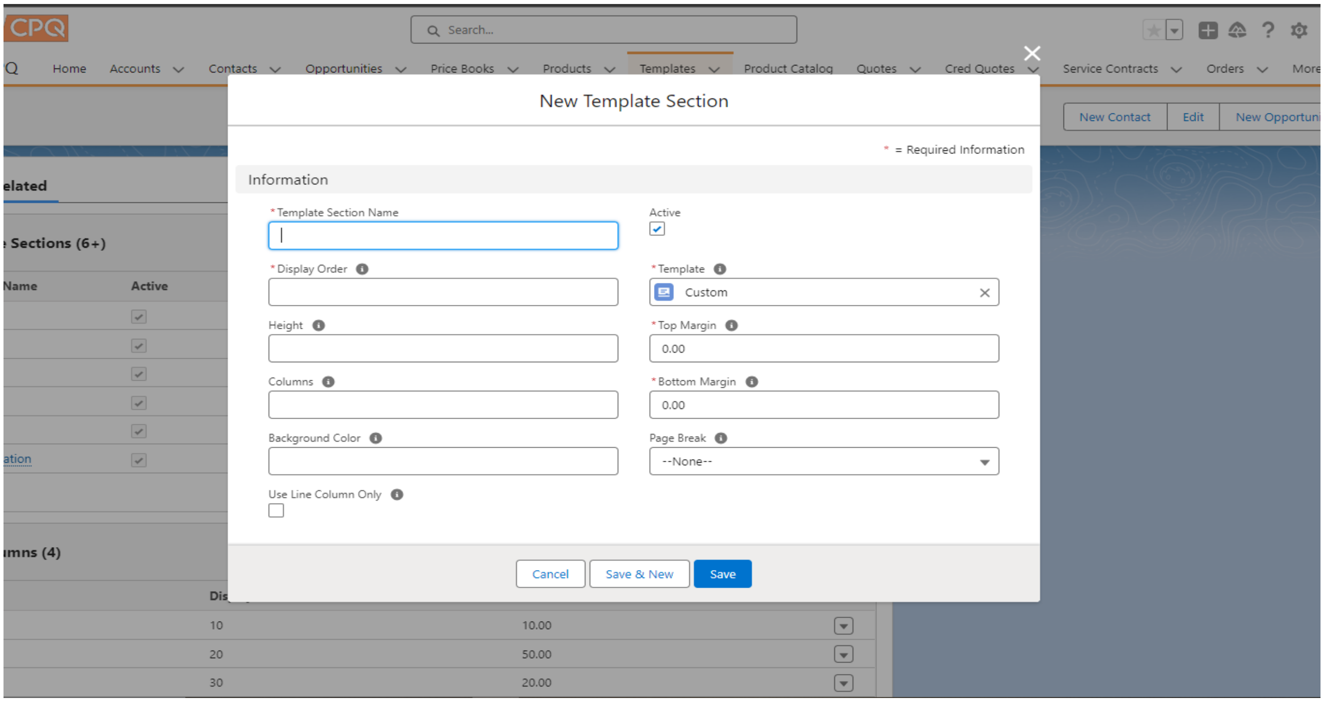
- Customization Enabled field is used to create a customizable template if set it as true else it will use the static template with dynamic data provided by us.



In the related section of template there is Template Section which defines the rows and Line Column which defines the table:-



4.7.1 Templates Section



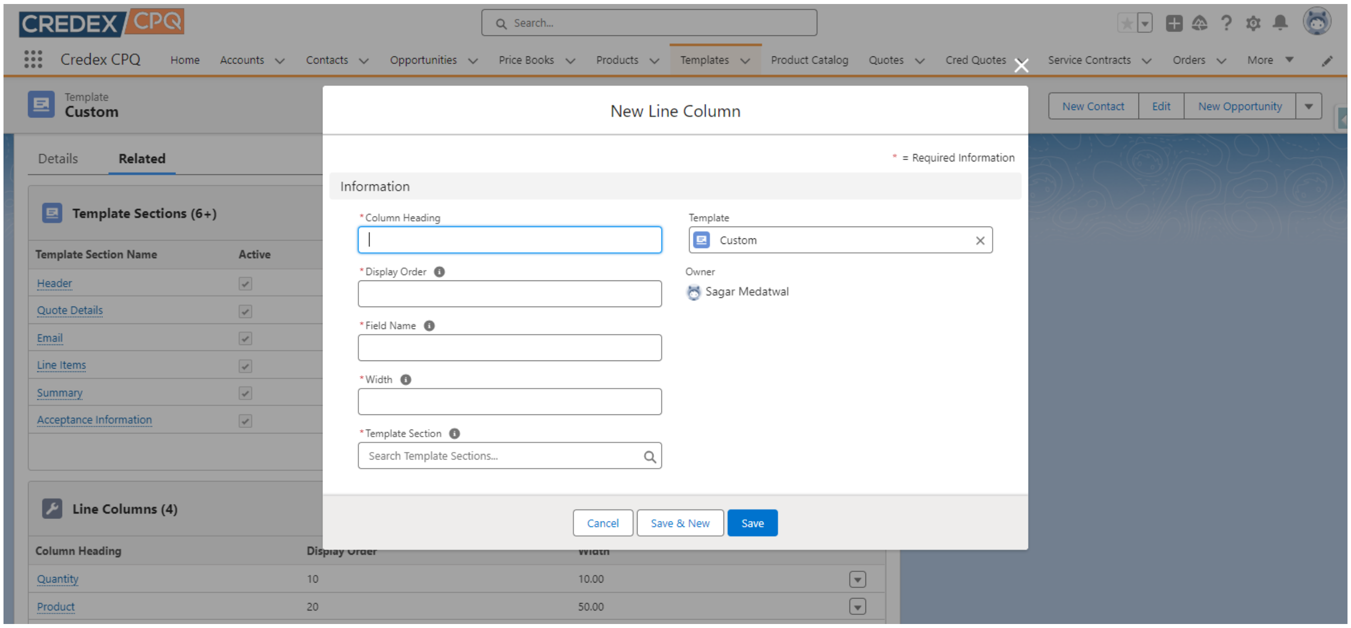
The Templates Section stores different section information which defines the display orders of rows and columns each section must have also their css and other properties like color and margin as

Well:-

- Template Section Name:- It stores the specific name of the section (or row).
- Display Order field stores the order in which the sections(rows) will be visible on the template
- Heights fields define the specific height of that section in percentage.
- Columns field states the number of columns in a specific template Section.
- Top Margin & Bottom Margin field defines the css property for the specific section in **inches.**
- Background Color fields state the color for the section and the value provided must be in **RGB** format.
- User can also add Page Break to different sections either before or after as per the requirement.
- Active Checkbox will decide the activation of template sections.
- Use Line Columns Only On checking the line columns you can add line items to that specific section in a table format and will not be able to use template Content (markup or free flow fields).

  Note: - There is also a Quick action '**Clone'** which can clone the section through which you can reuse the component again in different templates.

4.7.2 Line Columns

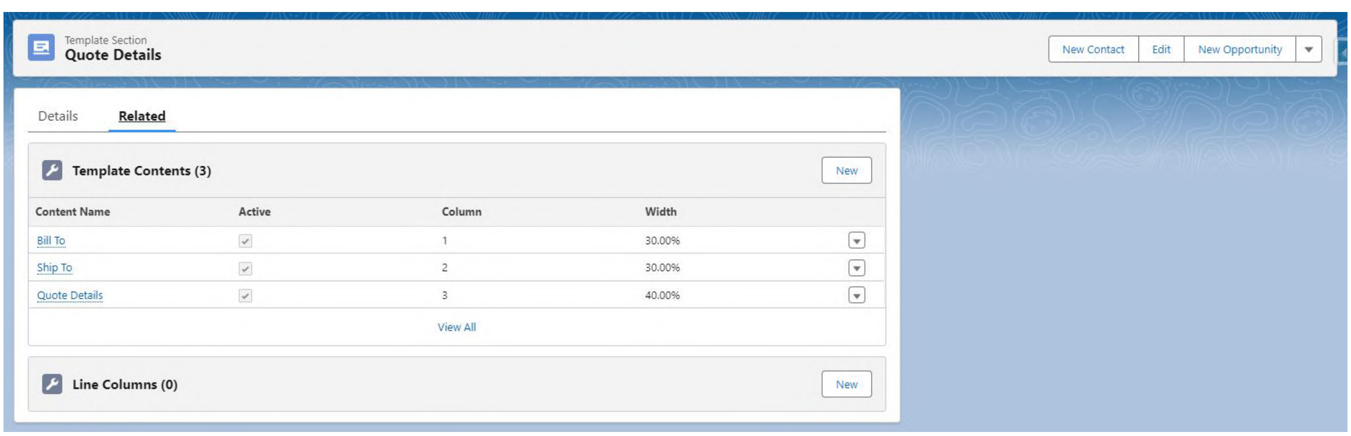


Line Columns stores the information about line items related to that object and displays them in tabular format by classifying them in different order and by their specific field name.

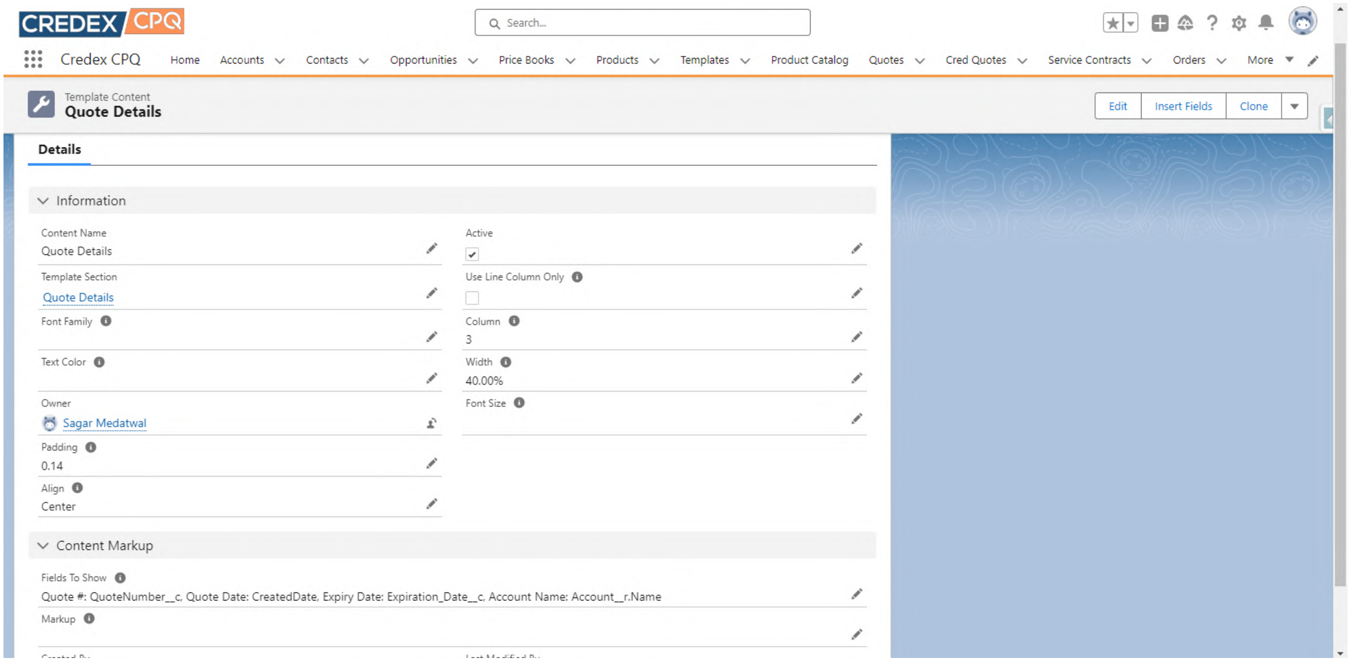
- Column Heading:- It states the name of the table column which will be shown on the template.
- Display Order:- It defines the order in which the column will be displayed.
- Field Name:- It stores the field Api name of the related object line items field which displays all the items related to that.
- Width:- fields define the specific width of that column in percentage.
- Template Section: Defines in which section this line column will be displayed.

4.7.2 Template Contents

In the related template section there is Template Content which displays the values of the related object fields on displays it on the template



On Creating a New template content you can insert fields related to that object or user can use free flow markup and can display it on template:



- <u>Content Name; -</u> States the specific name for the content added to the template section.
- <u>Template Section: -</u> Defines for which section this content should be visible.
- <u>Font Family & Text Color:</u> Users can add font as per their choice from the font family field and can add the desired color for the text which should be in (**HEX Code**) format, as well as <u>Font Size</u> in **inches.**
- Users can add <u>padding</u> to the contents in **inches** and can <u>Align</u> items as per default values provided, also they can decide the <u>width</u> of the content in **percentage**
- Columns: - It states in which column of the template section the value will be displayed.

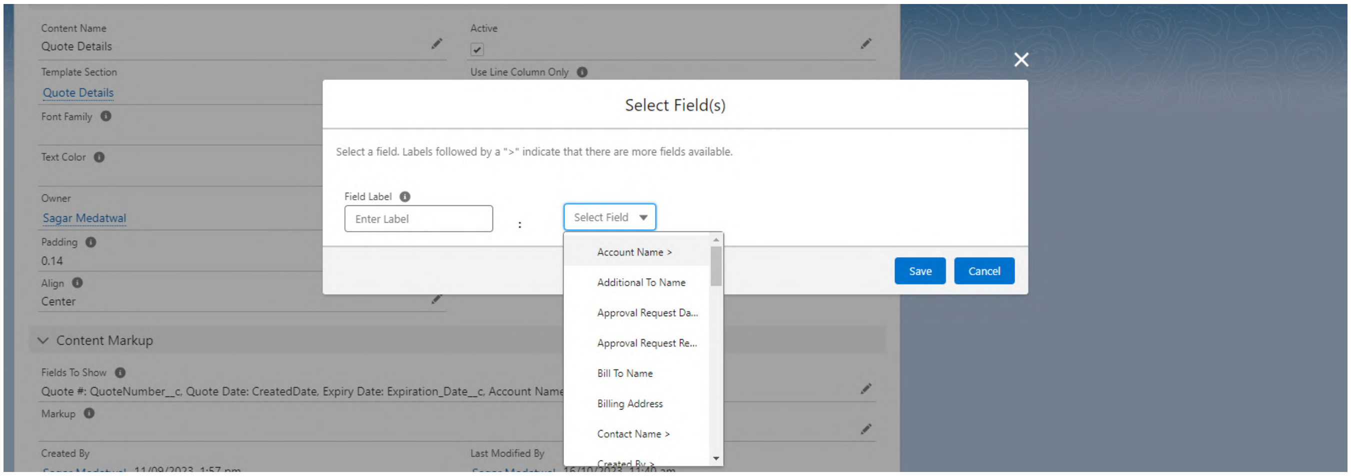
Then Under Content Markup –

- <u>Markup</u> field is a rich text area which shows free flow content that is added to it for that Template Section.
- <u>Field To Show</u>: - If any User wants to add any referenced field related to the object, there is a quick action as **Insert fields**.

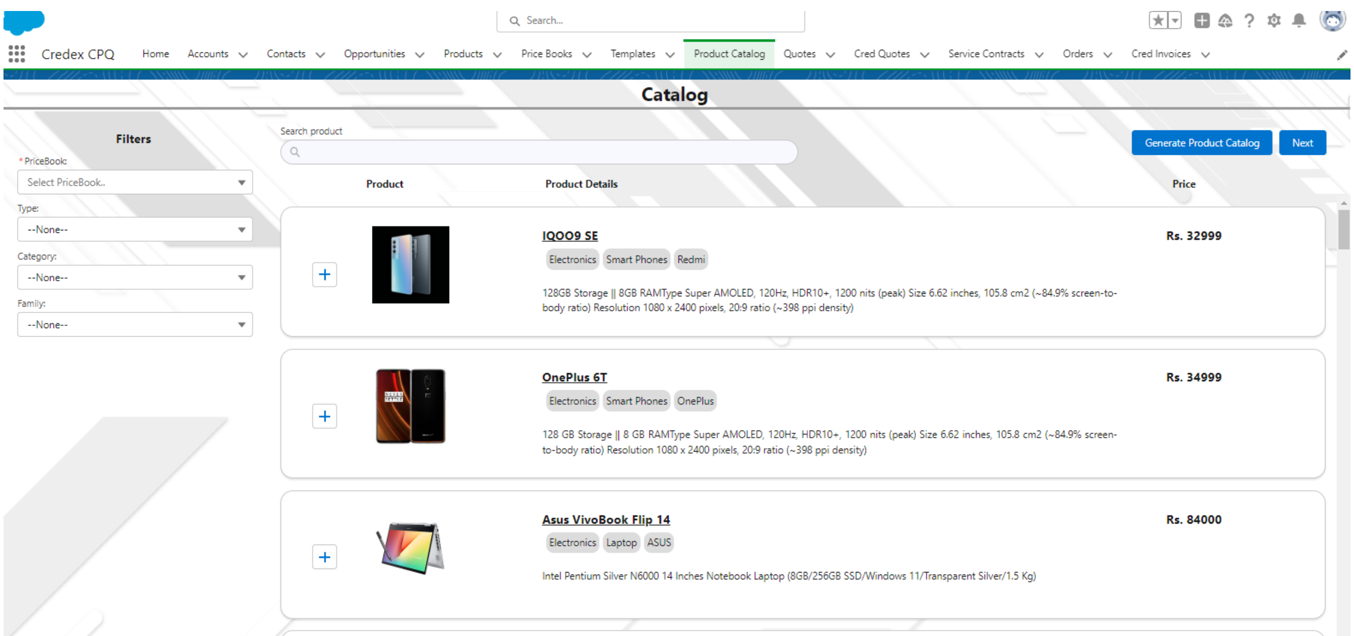
  On click of insert field it shows a modal which has the option to add field labels and then field API name, as well as related object fields which are referenced to the specific Object.

  Note:

  In the below image you can see the context to insert field, the field names and for the selected field it will insert the field API name



5.8 Product Catalog



By Product catalog, sales representatives can quickly configure quotes with accurate product details and pricing, aligning with the CPQ approach.

In Right Side, Each **product listing** in the catalog provides comprehensive details, including product name, description, images, specifications, category and belonging family.(From Products and Price Books)

Each product listing has an add checkbox by selecting we can determine whether to add or remove the products.

In Left Side, their is **Filters**, by applying

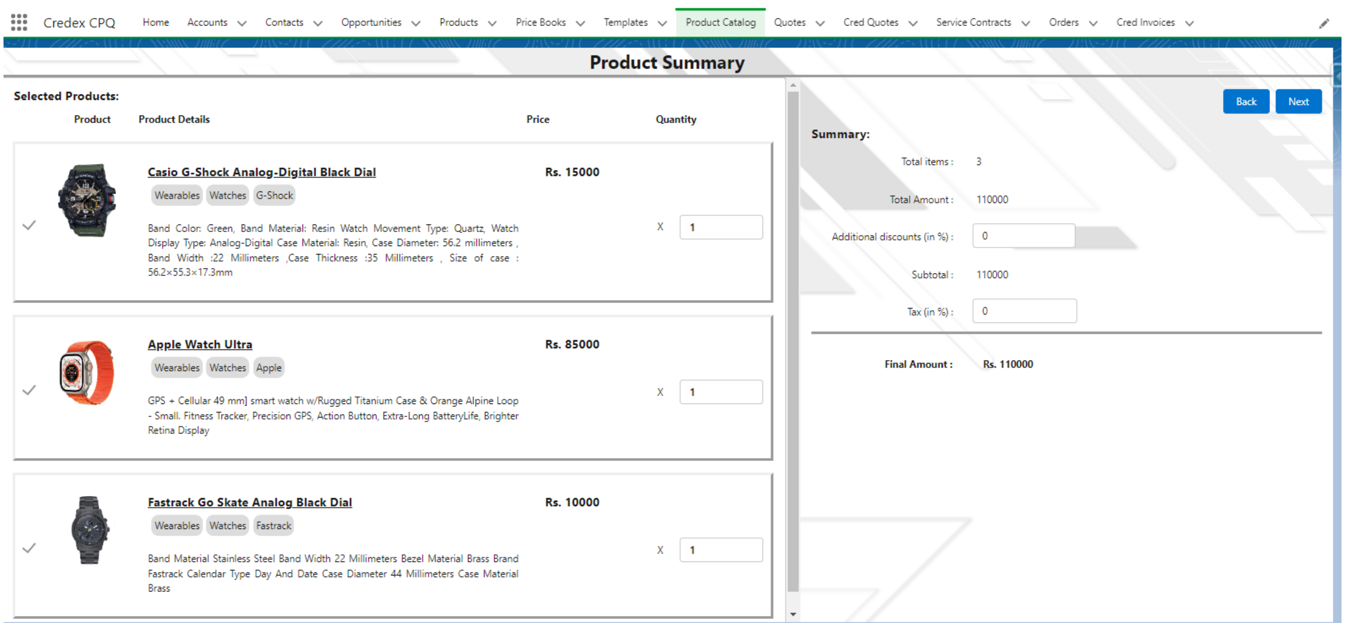
- The catalog displays prices associated with each product based on the selected Price Book, ensuring accurate and transparent pricing for customers. Those Price Books are required for selecting products or moving forward.
- Also there are types, categories and family through which the belonging products are filtered accordingly (to those picklist).

There is a **Generate Product Catalog** button which asks the user to select Account for generating the product catalog (according to selected Account ,the name, Company logo and address can be referenced on the catalog).

And it opens a new window where users can view the selected items and can print it in a document format.

On moving to next it opens the product summary section.

5.9 Product Summary



Product Summary Configures the pricing of the selected products by adding the quantity, discounts and taxes.

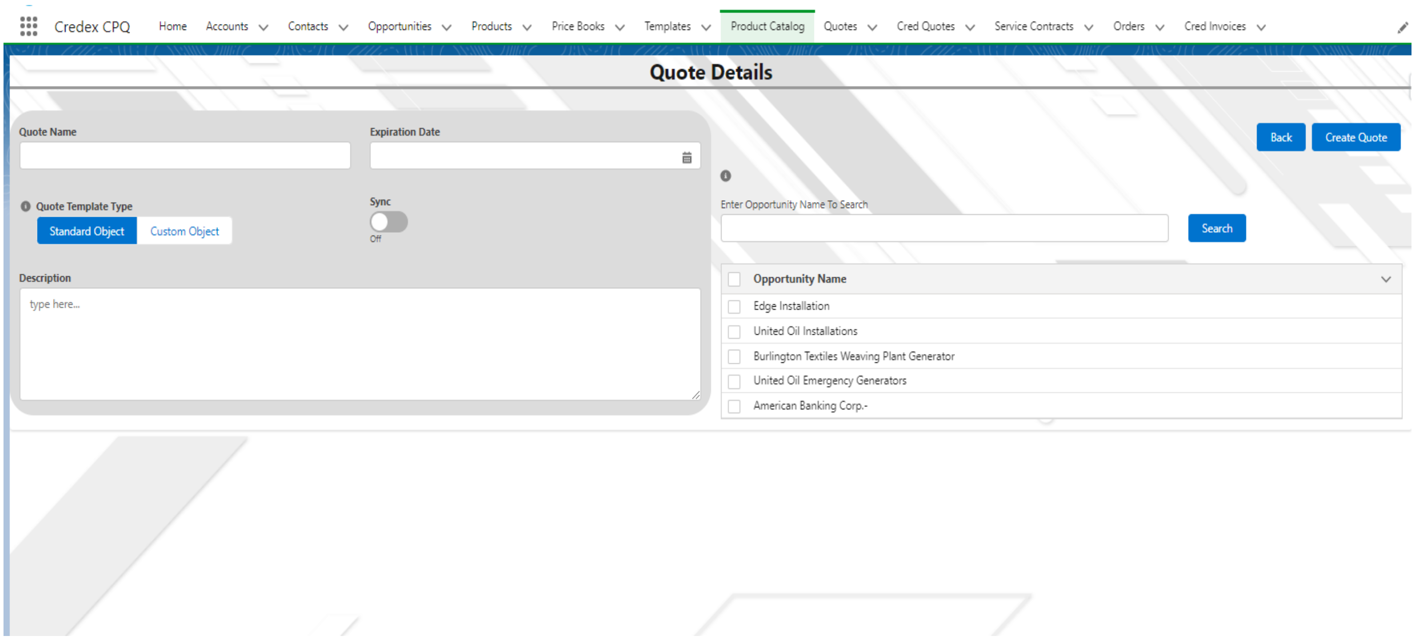
In Left Section of the Product Summary page:-

- It shows all the initial selected products and on each Listing there is a **Quantity Box** through which users can increase the quantity according to their requirements.
- The quantity should be greater than zero otherwise it will throw an error message.

In Right Section : -

- Under the **Summary** it shows the total quantity of selected products including the (quantity).
- The Total Amount before adding any discount and taxes that is (sum of all the unit price of selected products).
- There is an input box through which users can enter the discount in(%), which will be applied to the total amount, and accordingly the updated value will be displayed over the Subtotal.
- The discount will be checked on creating the specific quote for that particular opportunity, if the associated account of that opportunity selected has the maximum discount discount limit then it will trigger the discount approval process on the Quote Creation.
- There is an input box for Tax which value must also be in (%) and the Final Amount is tabulated accordingly by adding the tax and differentiating with discount.

5.10 Quote Details



Quote Details Page gives an interface to users where they can enter the Quote name and can decide the expiration date for quotes.

As well as there is an option through which users can choose whether they want to use the standard quote object which is provided by salesforce or the custom quote that consists of a custom template.

On enabling Sync option all the products related to the opportunity line items will be replaced with the currently selected items.

There is a Description Box where users can add any information related to the Quotes.

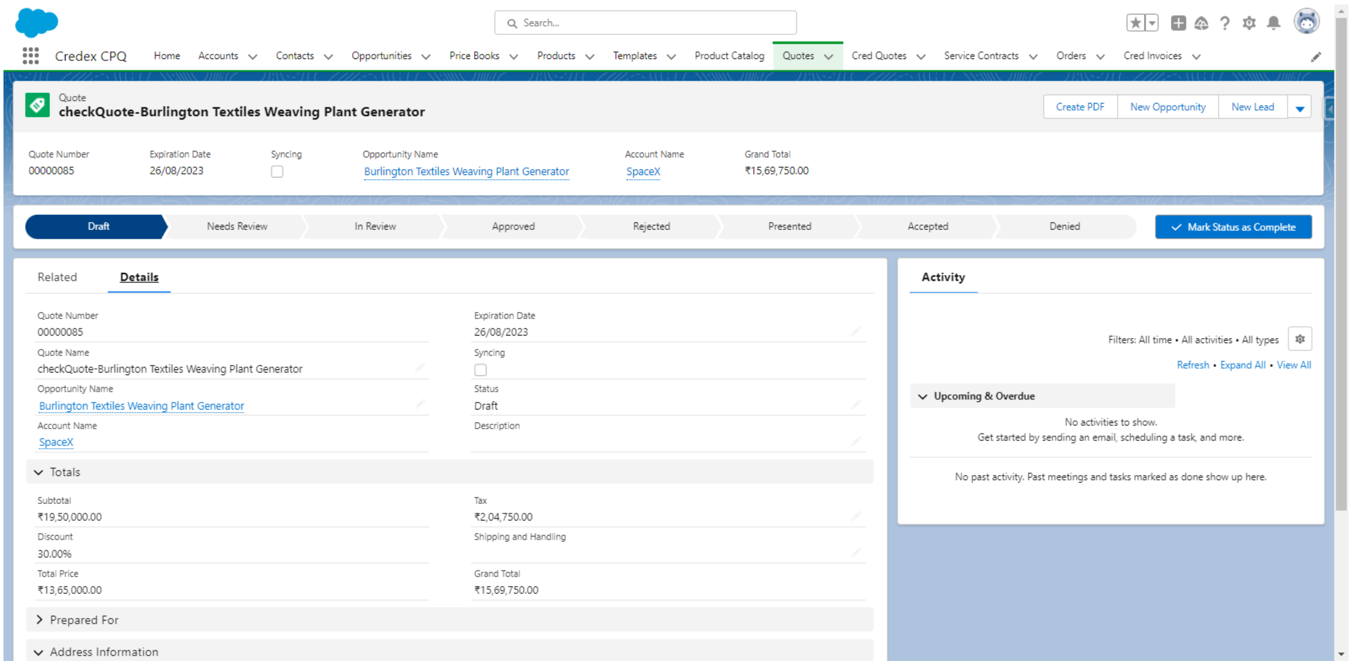
On the right side of the page all the opportunities related to the initial price books selection on the first product catalog screen, will be displayed here for which the Quotes can be generated.

Users can create multiple Quotes for multiple opportunities at the same time.

On Clicking the Create Quote button it will redirect to the List View of Quotes or Cred Quotes object, according to the selected functionality, and quotes will be created with the provided name.

5.11 Quotes & Cred Quotes

Standard Quotes :- The standard Quote object in Salesforce plays a formal offer to a customer, outlining the details of products, services, pricing, discounts, and other terms of the proposed deal.



Quotes typically go through stages such as Draft, Proposal, Negotiation, Approval, and Closed, mirroring the progress of the sales process.

All the selected products/services through the product catalog will be stored in the quote line items on Quote creations.

It is initially in a Draft status where the user can change the values according to its requirements.

The required Aspects that is being used to generate a document,

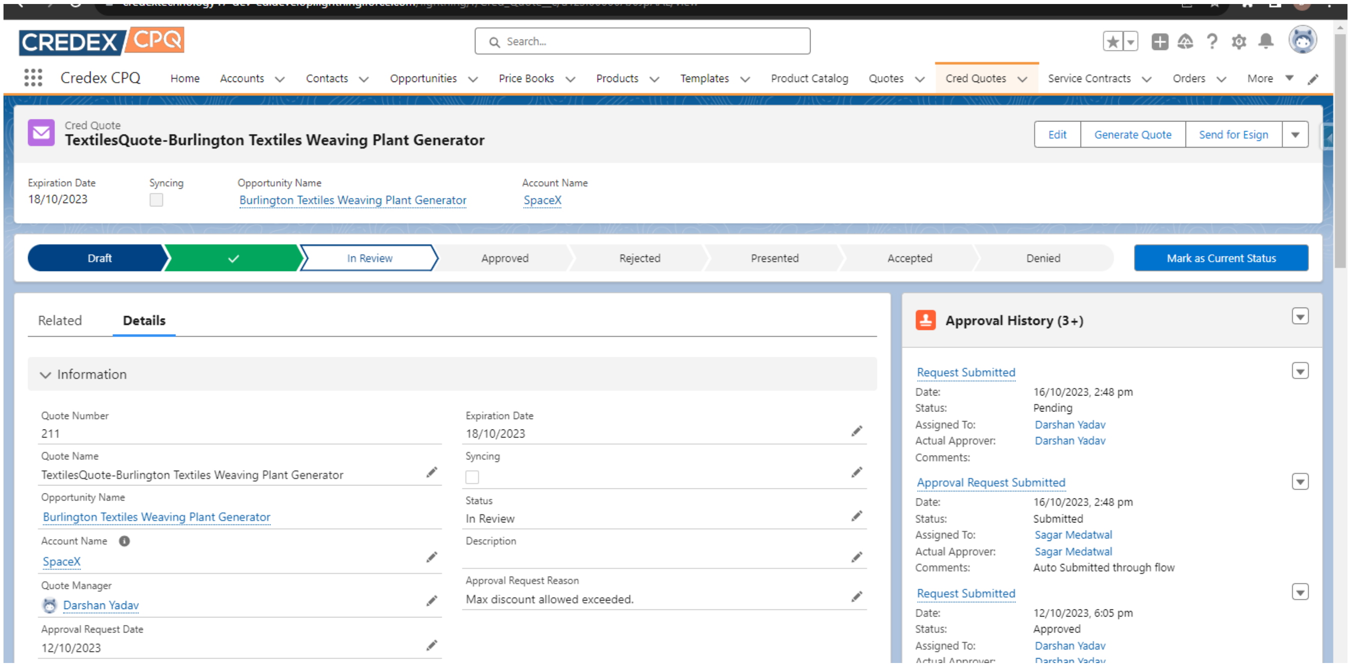
- Quote Name , Contact Name(Billing contact) , Account Name(in Headers and Footers).
- Opportunity: Quotes must be related to Opportunities, from which contacts and accounts are referenced.
- Expiration Date: The date until which the quote remains valid.
- Products: Lists the products or services being quoted, including quantities, prices, and totals.

On Clicking the Create PDF button the user can preview and download the quote generated as a document.

On status Accepted the Contract will be generated and stored in its related tab and the required fields are taken from quote as reference.

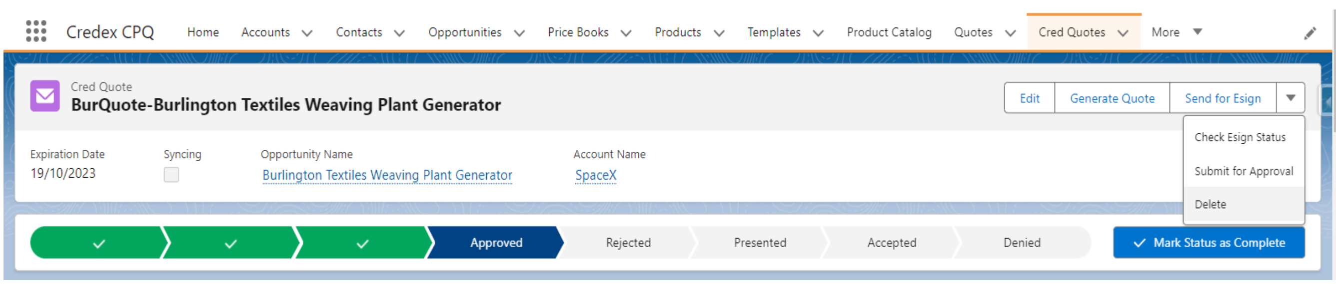
Custom Cred Quote :-

Similarly, like standard Quote functionality but enhanced by including custom Generate Quote Button through which multiple quote templates can be used for Quote Creation as Document. For multiple templates the reference is being taken from the Template object, where the different templates in various formats are stored as record, as well as you can make your own custom



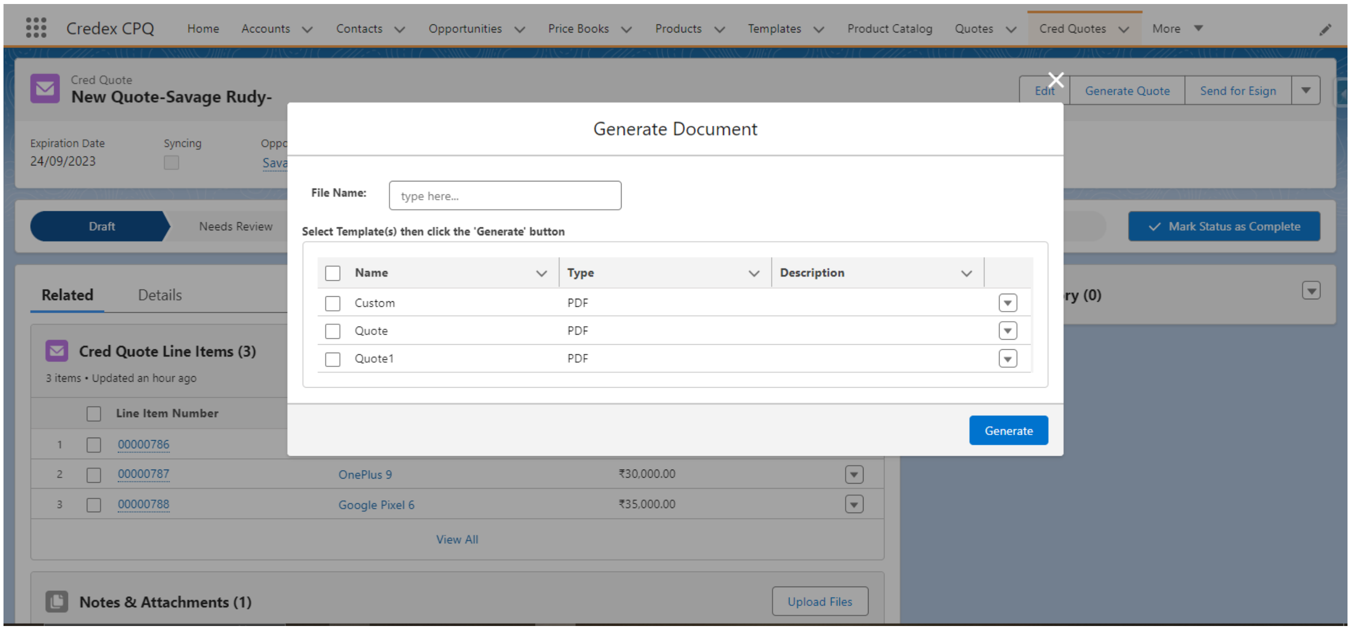
For the Quote template we are taking references from the contacts(of address, Name, contact number),all the products are taken from the Cred Quote Line item, for headers and footer reference is taken from a related account(Logo, address,site).

In the template we are also showing the (prepared by) which holds the information of the Quote Owner.



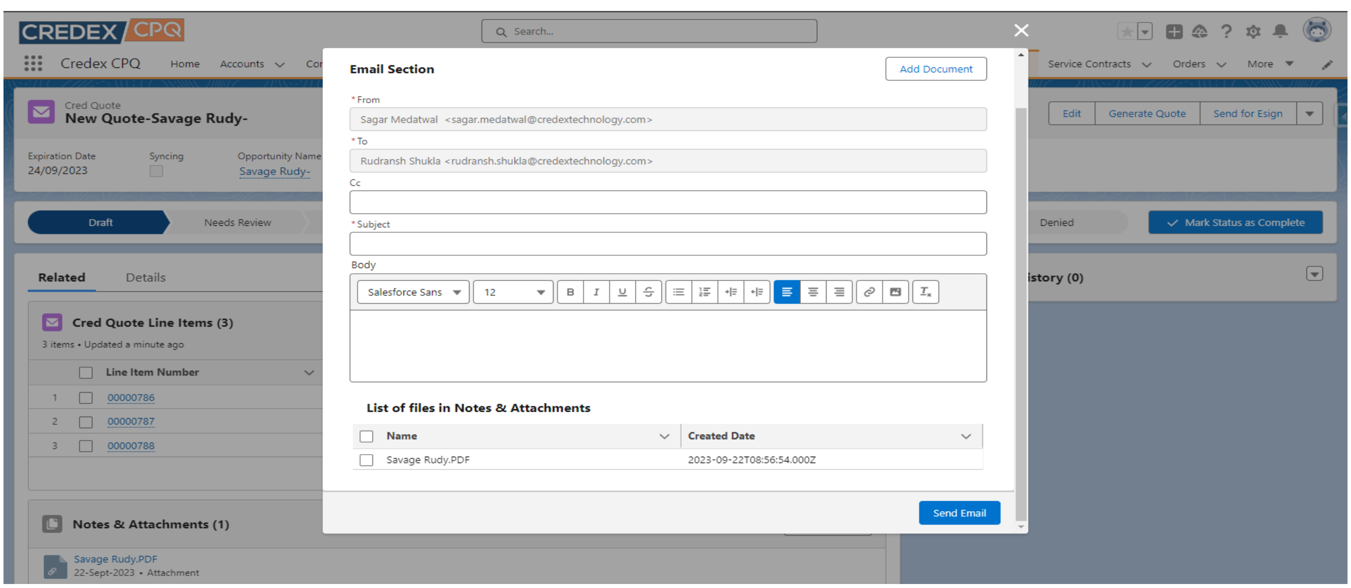
On Cred Quote there is Quick Action to **Generate Quote** Document for that related record.On clicking generate quote then you will see a list all the templates that are available which are active and can be used to generate the document, you can also preview the document before creating through the preview button in the drop down menu of that related template option.

And the generated Document will be stored in the related Notes and Attachments and can be shared to the specific related contact.



After Creating document you can send the Email for Esign to the contact associated with that object the related **To** section is not editable in sending Email, as the details is fetched from primary contact associated with the object and **From** is taken from the default name of DocuSign Account.(service used for sending Email) and the created document can be added to the attachment of sending email on click of add documents.

Users also have the option to add a body, Subject and can add any one email for sending the carbon copy.

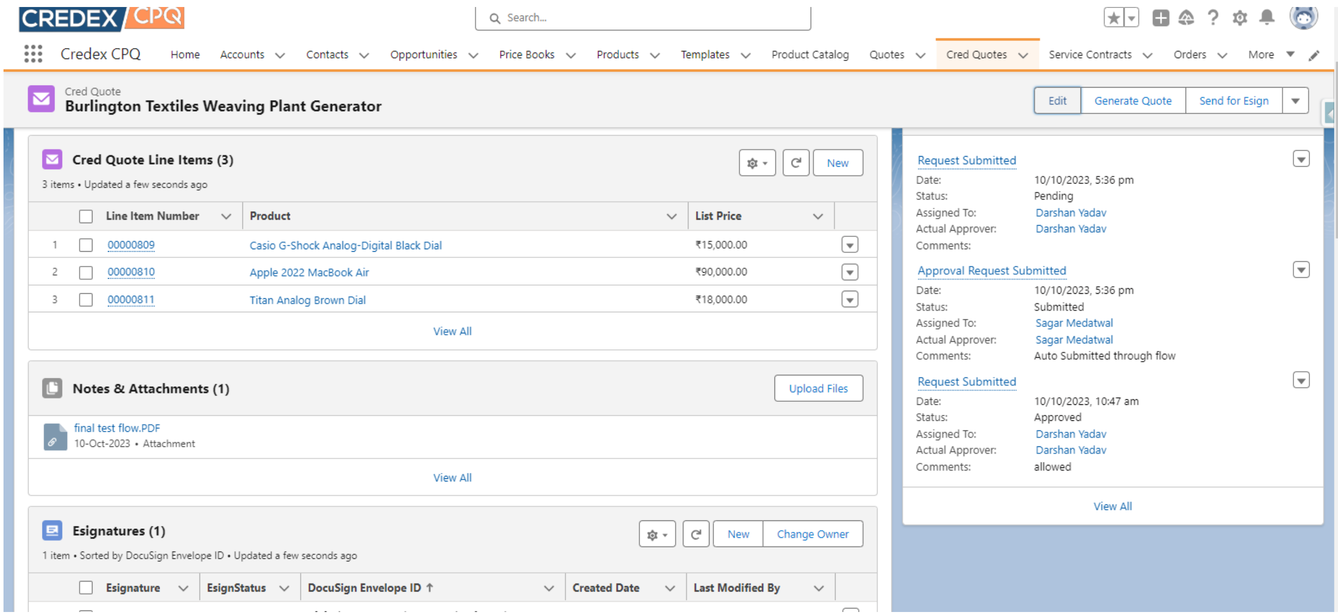


When the document is Sent for ensign, a record will be created and stored in its related Esignature object and their ensign status can be tracked. By clicking the **Check Esign Status Button** they can track Esign status and accordingly quote status will be updated.

When the document Sent for ensign is signed then, on quote status will be InReview, if the customer views the document then the status will be updated to presented.

When the document Sent for ensign is signed and completed then, quote status will be updated as accepted, and service contracts will be generated and stored under its related tab.

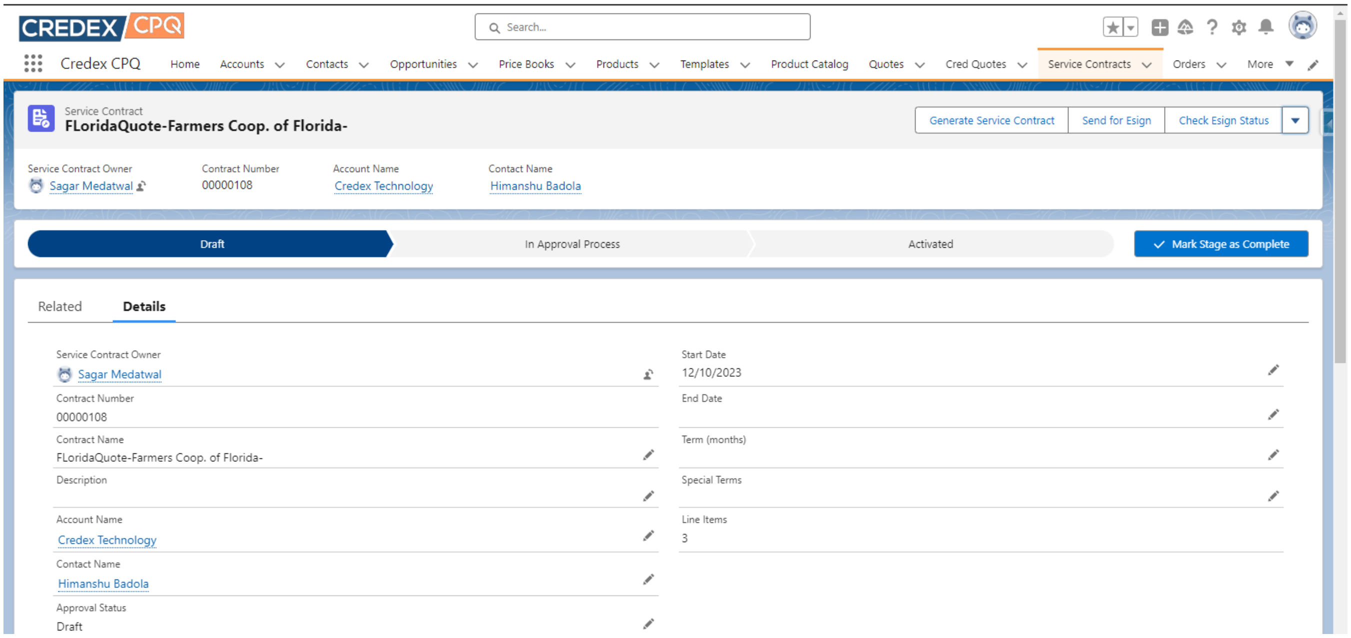
And the signed document will be stored back to an ESignature related record in its notes and attachments.



In the Cred Quote related tab , there are Cred Quote Line items which store all the selected products that are selected at the time of Quote Creation (on Quote Detail page).In the notes and attachments section the recently generated Quotes in a pdf format will be stored. And Under Esignature the related document sent for Esign is stored and its status can be tracked.

You can also track the Quote Approval History if the maximum discount related to Quote's Account is exceeded, then their steps and status can also be viewed in the related section.

5.12 Service Contracts



The Service Contract object represents formal agreements between your organization and customers for delivering specific services over a defined period.

Key attributes like Contract Number,Owner Name, Contract Start and End Dates, Terms, Status, and links to associated Products/Services stored in there Contract line item are referenced and structured in the Service Contract Template.

Users can generate their own custom template, and they can add multiple terms and conditions as per their requirements through the markup field on custom template also, you can preview the template.

On clicking the **Generate Service Contract** button it will show a modal where all the related contracts templates are shown from which the user can select accordingly and can generate the contract in document format.

After generating it will provide a link which will open in a new window as a preview of the generated contract , and a pdf format file will be stored in notes and attachment.

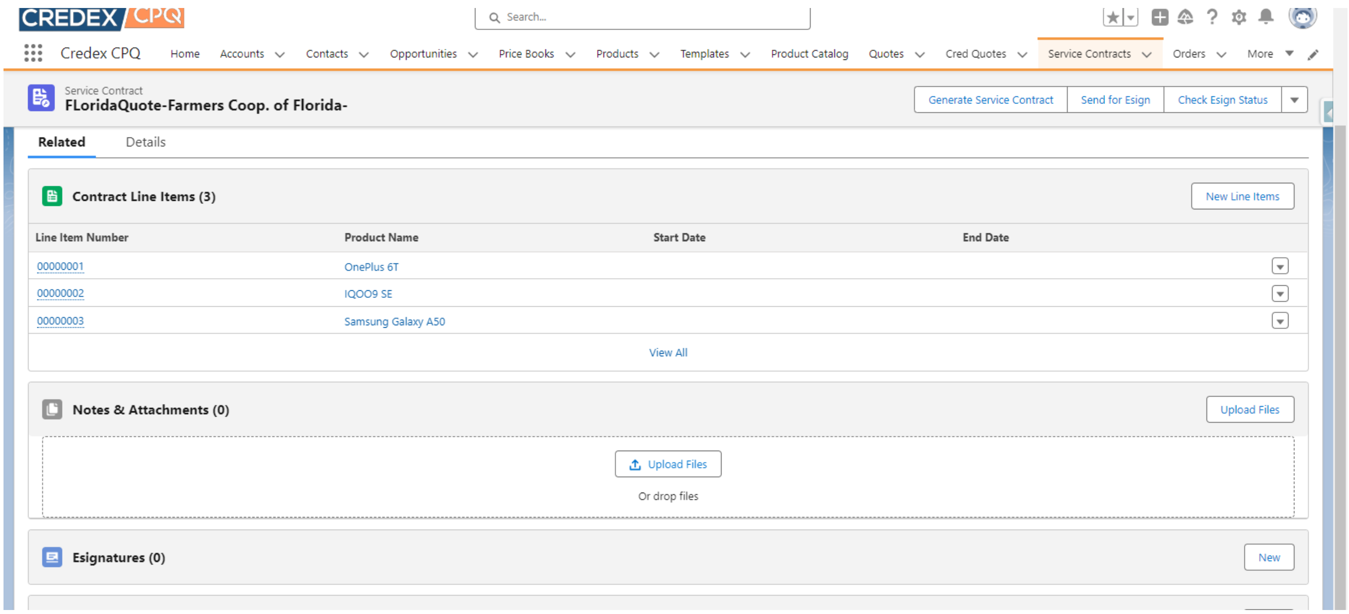
Note:-

Similarly like Cred Quote there is also an action to send a file for Esignature (Send for Esign) where you can select the generated doc. as attachment and send it to a related contract's contact.

When the file sent for esign is completed and signed then the contract status will be updated to activated

Service Contract is stored as Draft and on change of status to Activated in its related section order is being created , all the references are taken from the contract and from the related Account and Contact.

If the File is sent or delivered then the status will be updated as in the approval process.

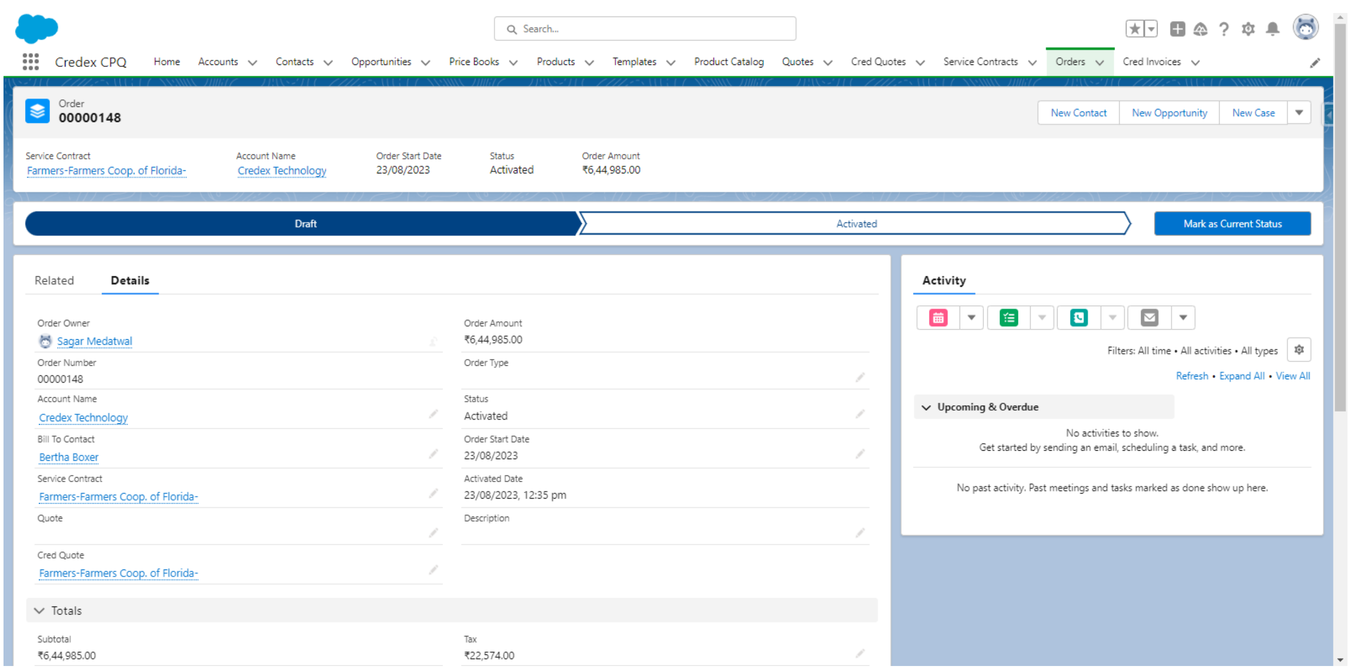


In the related section you can find all the products associated with contracts in their related contract line items,

Also all the generated service contract documents are stored in related notes and Attachments.

And the record will be created for the file sent and will be stored in the related Esignature section.

5.13 Orders

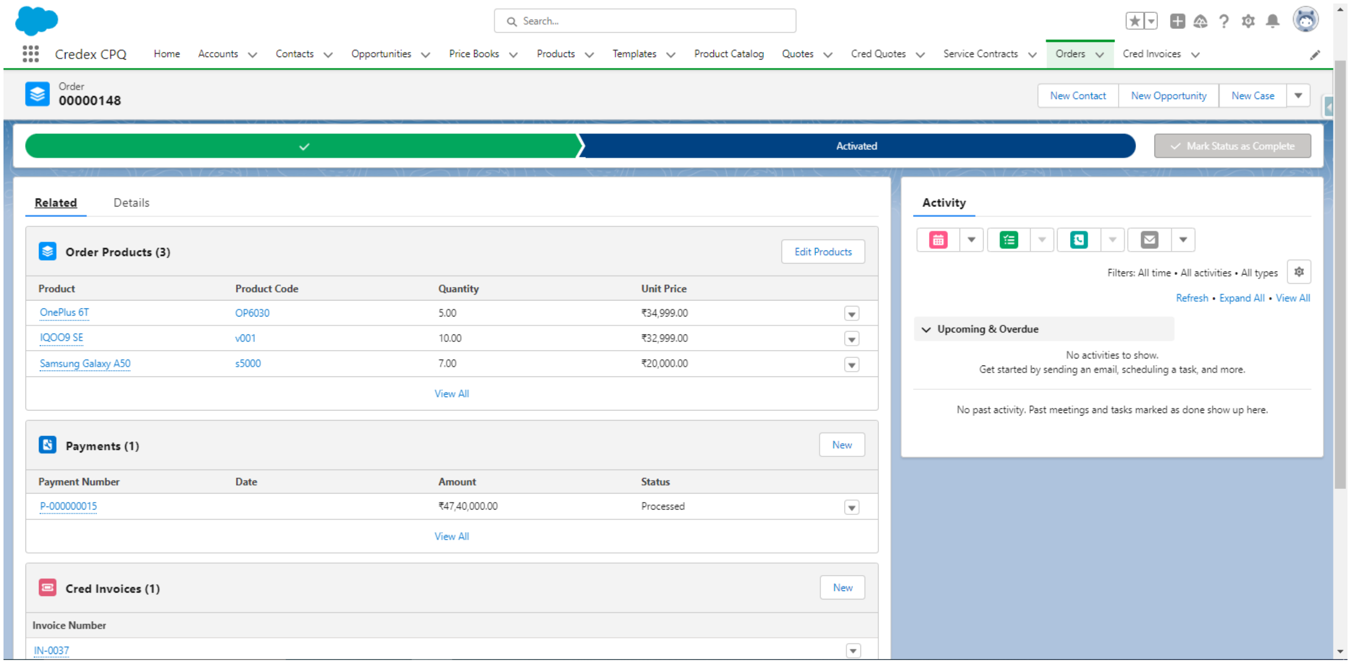


Within the Order object, key attributes like Order Date, Order Status, Shipping Information,GST Registration number and associated Products/Services stored in the order line items, provides a snapshot of each order's details, allowing for effective tracking and monitoring. These attributes are referenced at the time of creating invoice template .

In the Totals section all the details of Product pricing such as subtotals, discounts, taxes and Grand Totals as well as the address are stored and referenced from service contract.

Currently at the time of Contract Activation, the Order will be created and its status will be as draft the users can make changes and can Activate the order.

At the time of Order Activation it will check for the payments in its related section and on not having the payment and if the user tries to activate the order it will throw an error which states no payment found.

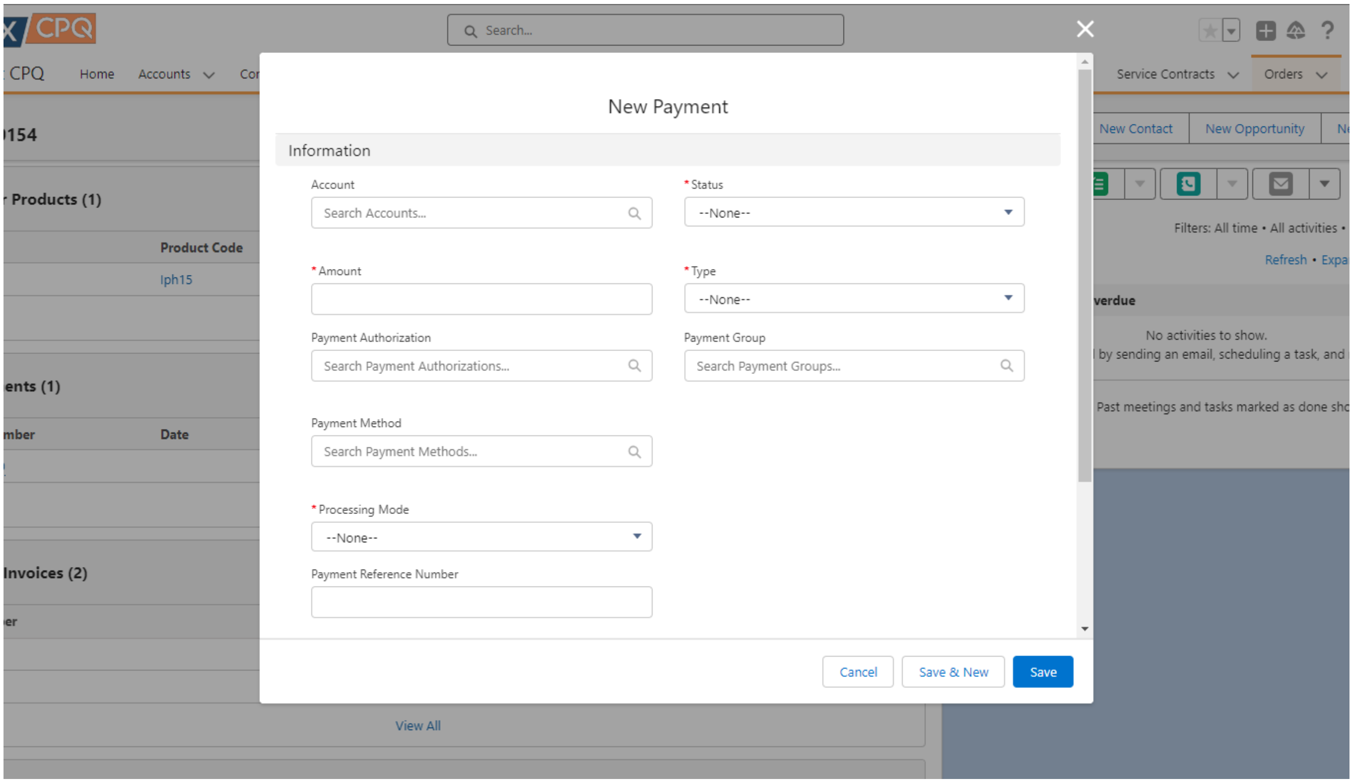


Initially before Order Activation users should go to its related section and under they have to create a payment mark and its status processed then only they can be able to activate the order status.

After Order activation, it will create an invoice related to that order and store the information in the related section .

5.14 Payments

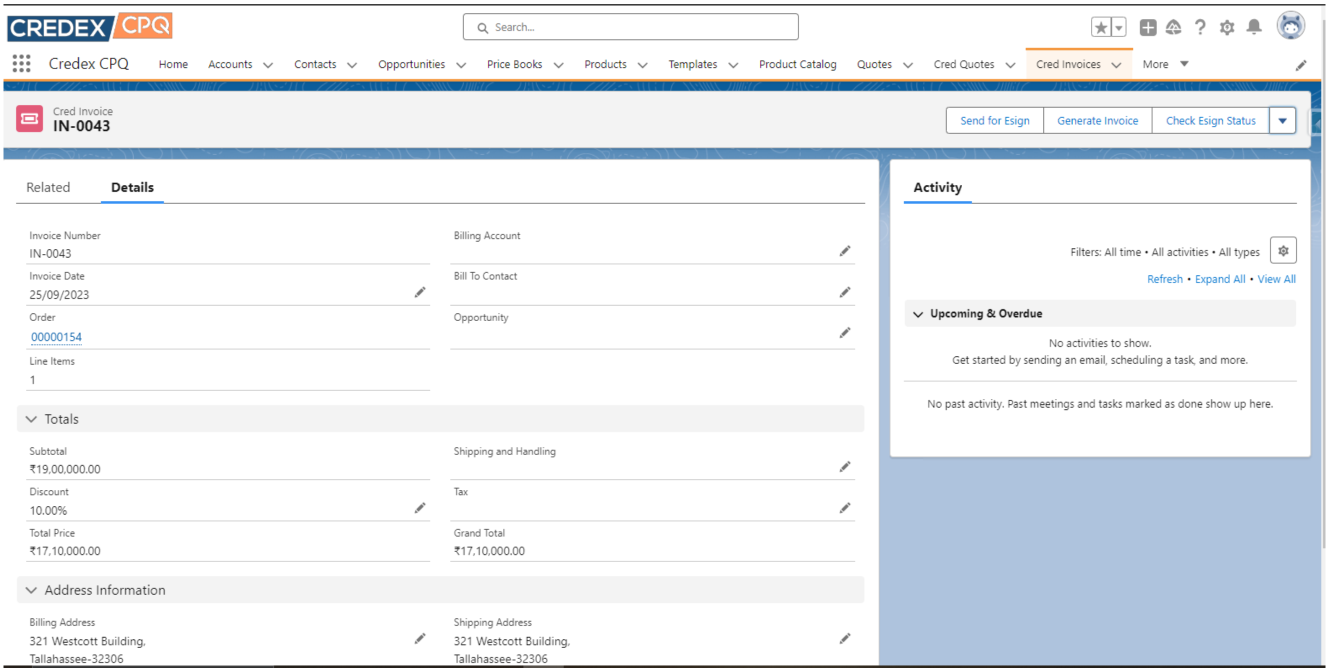
For the Payment section right now we are not adding any payment gateway, just taking the reference for the payment to change the order status for invoice generation , the admin or the user will have to enter the details manually at the time of its creation.



Key attributes that are required for creating the payments are Account(for which the payment is related), status (which shows the different option where the user can select whether is Processed , failed, declined or other) , Amount (it represents the Grand total of order), Type(whether it is an Sales or an Capture), Processing Mode (Referring to Salesforce or External method) and Payment Reference number (which refers to the transaction id).

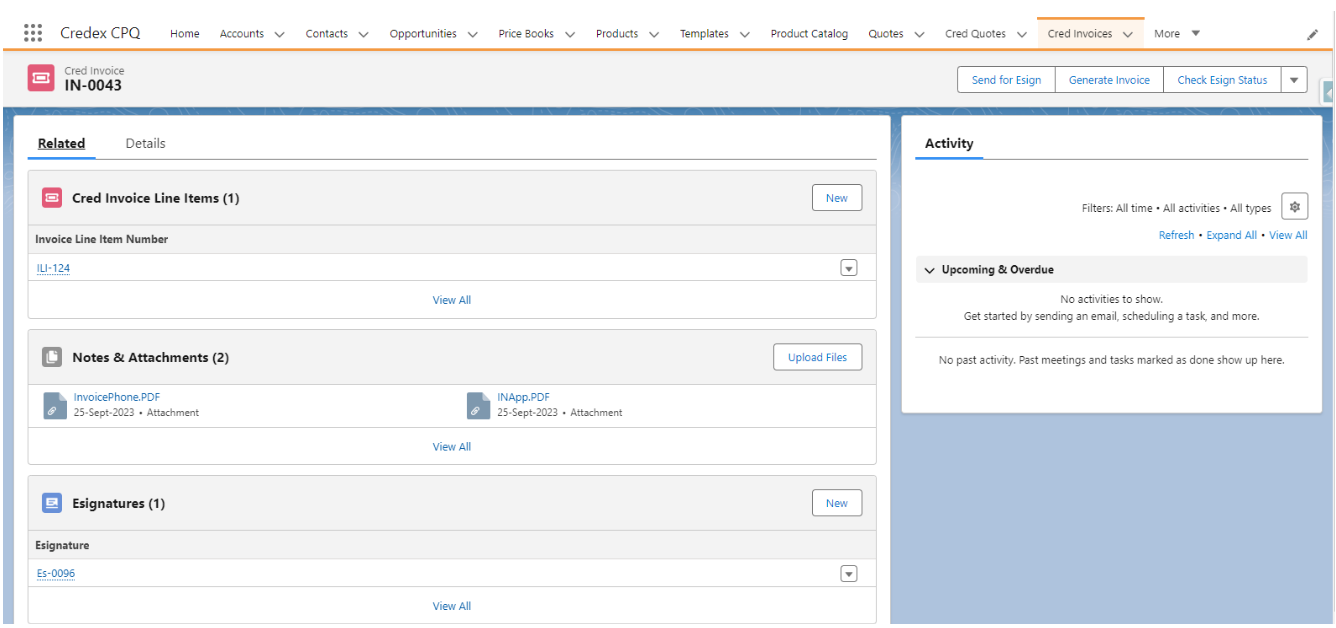
These are required for creating the payment , and the payment status should be marked as processed so that order can be activated and invoice will be generated.

5.15 Cred Invoices



Cred Invoice stores the information which are referenced from the order object and related Account as well as the associated contact for which the invoice will be created.

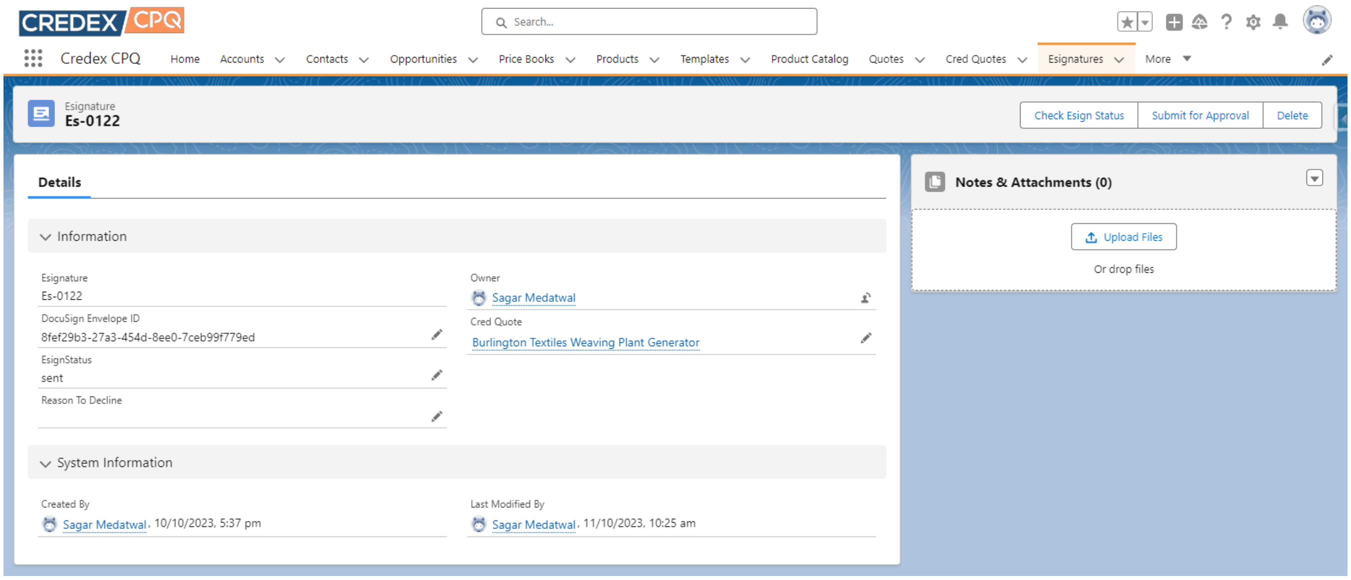
Key attributes that will be required for invoice templates are Invoice number, Invoice Date, Order number & Date, Bill to Account and Bill to Contact , references from the Payments such (Reference number,Totals section (holds all the amount conversions), and the items or product that are stored in invoice line items and Address information, these fields will be referenced on invoice template.



Similarly like Cred Quote and Service Contract, the Cred Invoice also has the Generate Invoice action on click of a modal where the user can select a template to generate a document as per the checked choice.

In the related section you can find all the Documents generated stored in its notes and attachment.and all the products associated with invoice under the related cred invoice line items.

5.16 E-Signature



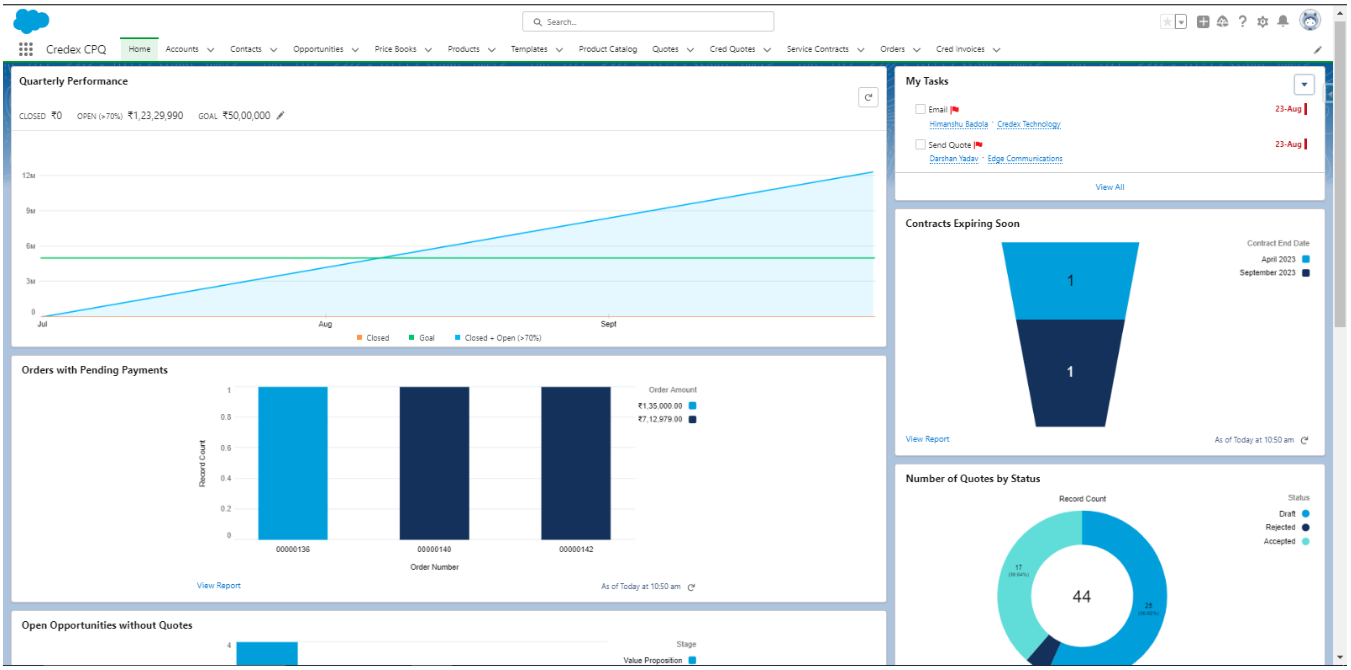
Esignature Object store the unique Id of the document sent for ensign and track the status of all the documents and their Esign status , if the status is completed then the file will stored in notes and attachment and it will appear under the related section of each object (Cred Quote, Service Contract, Cred Invoice).

The major field on the E-Signature object which are used for tracking Esign Status are :

- E-Signature fields hold the unique identity number of ensign records.
- DocuSign Envelope Id field stores the unique Envelope file number that is sent to contact (customer) which can't be the same for multiple records.
- Ensign Status It stores the status of the document fetched on click of checkEsign Status action and updates as per the result.
- Reason To Decline : If the field send of sign is rejected then, the reason for declining the file will be fetched and stored under this field.
- And the Owner who created the record can be tracked and the object record it is related to can be checked.

5.17 Dashboard

Home (tab) represents different reports and charts consisting of Tasks and recently created Records, of different objects.



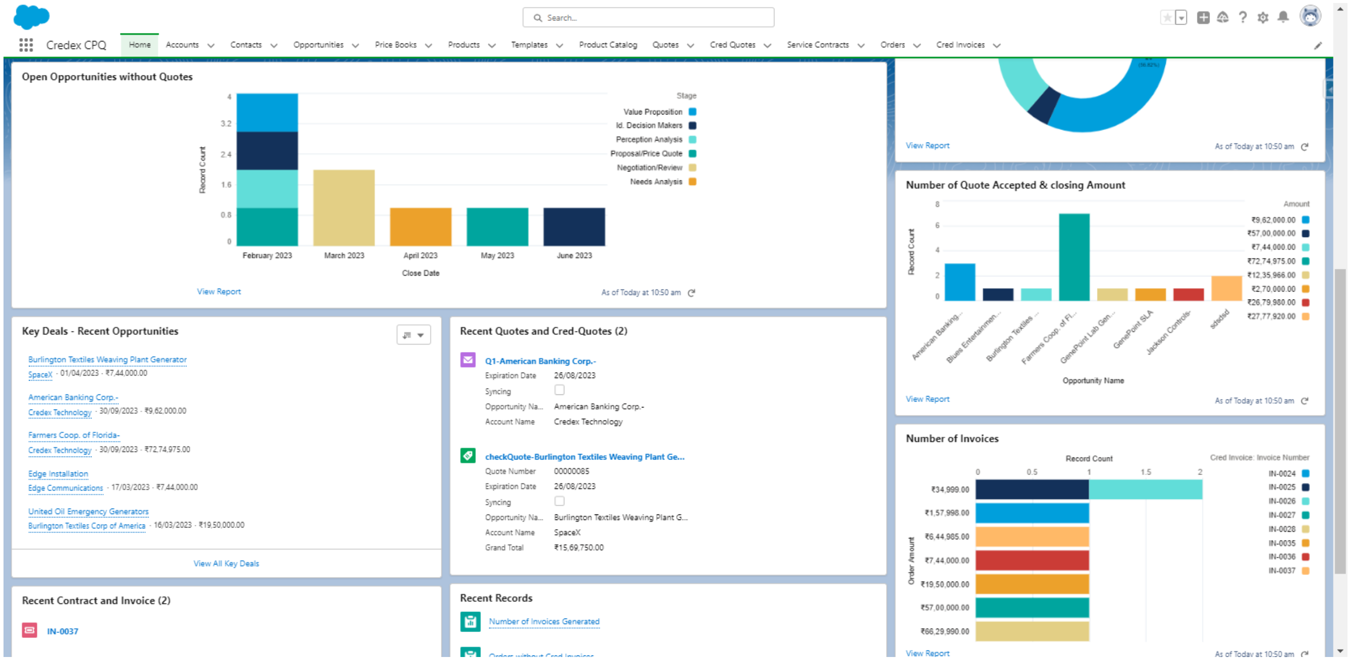
- The First chart reflects the Quarterly performance stating the percentage of opportunities closed won and also by setting an goals to achieve like monthly target for closing the deals .

- On the right Side there is the task section which shows all the tasks currently assigned to the current user and their due date .

- Below the Task there is a chart representing the Contract that will be going to expire soon in the upcoming months with their records count, these data are referenced from the contract object through their expiration date.

- There is a Number of Quote by Status charts which shows the record count of the Cred quotes with their different status.

- Order with Pending Payment consists of a chart displaying all the orders that are without payments and still in draft with their different Amounts.



- Open Opportunities with Quotes displays all the opportunities stages that are without quotes or cred quotes, and are still pending .

- Another chart , Number of Quotes Accepted and closing amount, with their record counts and related to its opportunities.

- Number of invoices generated displays all the invoices that were created and their amount with the records count.

At last the Key deal: Recent Opportunities showing their Name, Amount and Account they are related to, as well as there is the recent records section which shows recently created records of the (Quotes, Cred Quote, Contracts and Invoice) object.

6 Discount Approval Process

Our application includes a Discount Approval Process designed to ensure that sales executives provide discounts within the predefined limits set by account managers.

This process helps maintain consistency and prevents excessive discounts, ensuring fair and profitable deals for the company.

Account Object:

- Each account in the system has an Account manager field, which is referenced in Quote as Quote Manager.
- An essential field in the account object is the "Max Discount Allowed," indicating the maximum discount that can be offered for any deal.

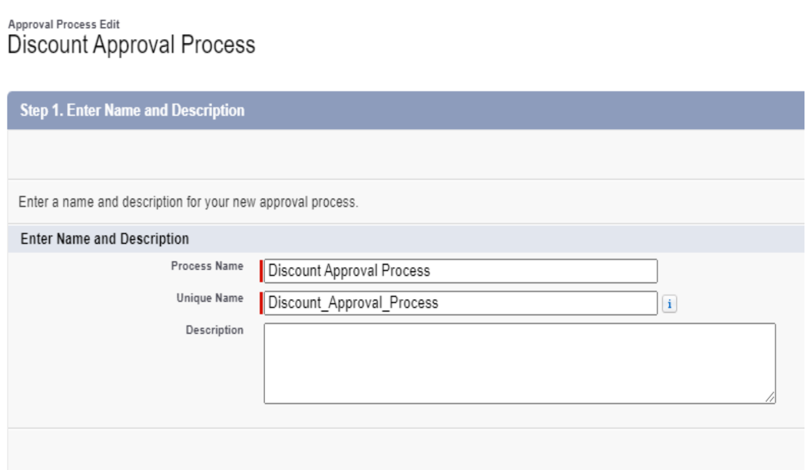
Steps to Create Approval Process:

Access Approval Processes:

- Navigate to Setup (gear icon) > Object Manager > Approval Processes > Cred Quote.

Create a New Approval Process: Step 1- *(Enter Name & Description)*

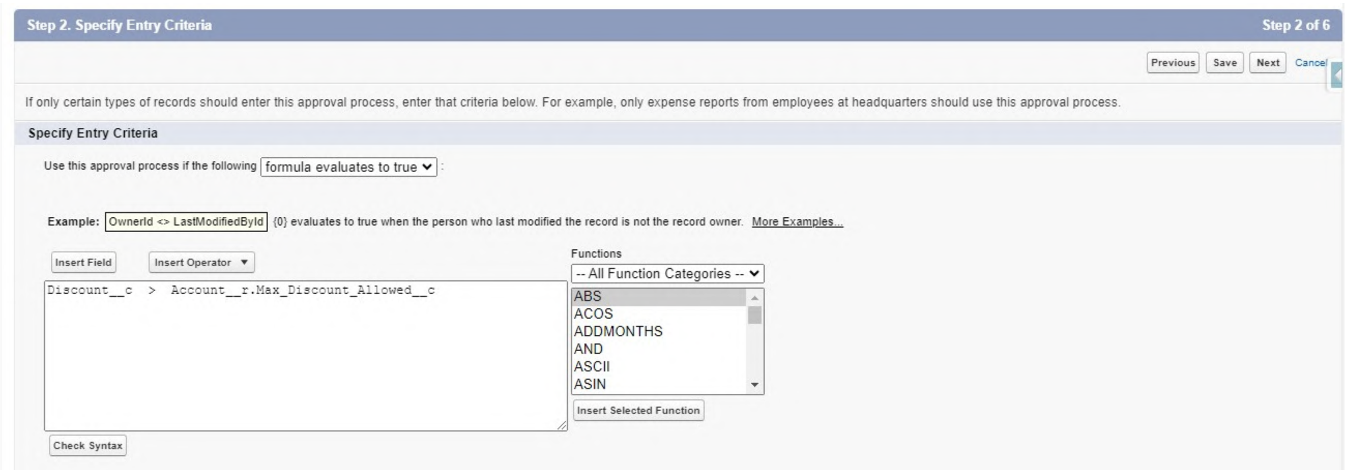
- Click on "New Approval Process."
- Choose "Use Jump Start Wizard" or "Select an Approval Process Type" based on your preference. For this example, let's use the wizard.
- Enter Process Name as **"Discount Approval Process"** it must be the same as mentioned below in the image.



Define Criteria: Step 2- (Specify Entry criteria of records)

- To use the approval process whenever the maximum discount criteria is exceeded for that you must add a formula (when conditions met) then further approval action triggers accordingly.
- Formula should be same as given:

  "CTQ__Discount__c > CTQ__Account__r.CTQ__Max_Discount_Allowed__c"



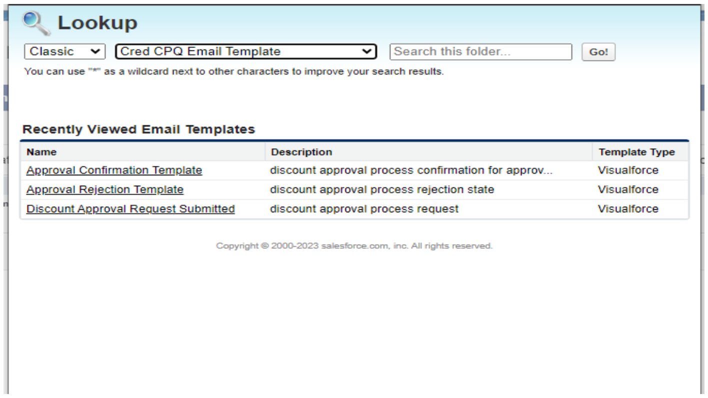
Step 3. Specify Approver Field and Record Editability Properties:

- Record Editability Properties: Administrators OR the currently assigned approver can edit records during the approval process.

Step 4. Select Notification Templates

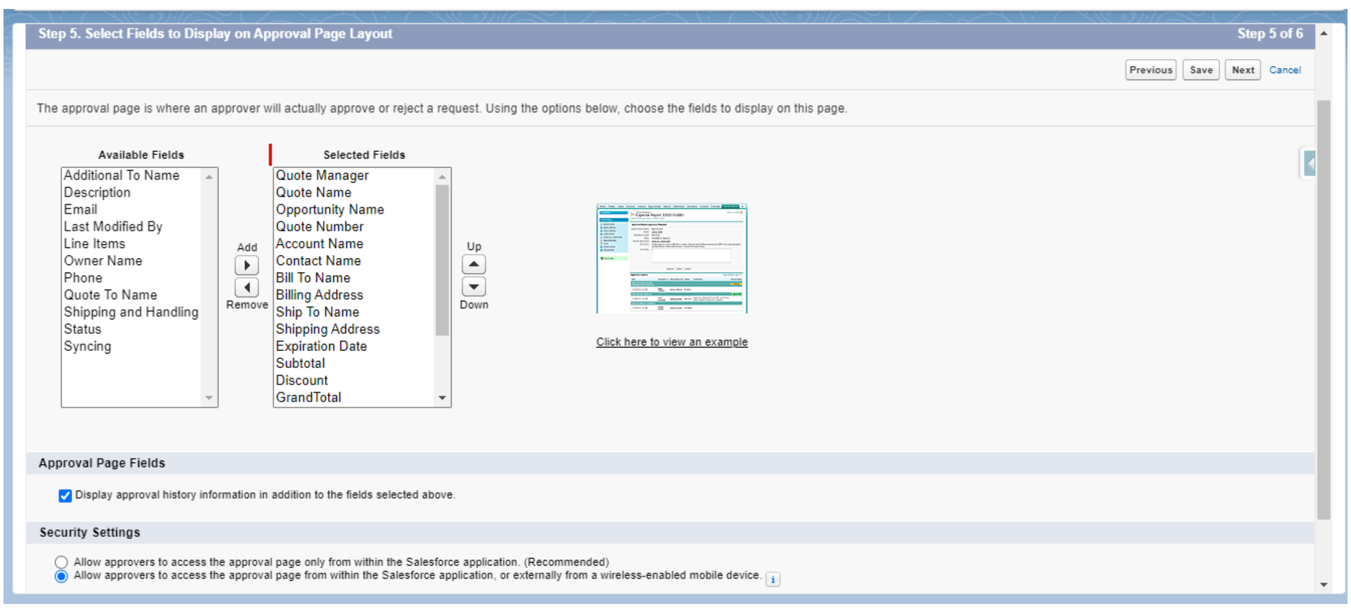
- There is a Classic Email Template folder as **"Cred CPQ Email Templates"** from which to choose the notification templates accordingly.

Cred CPQ Email Templates Folder:-



Step 5. Select Fields to Display on Approval Page Layout

- The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.
- Select the checkbox to track the approval history.



Step 6. Specify Initial Submitters

- Using the options below, specify which users are allowed to submit the initial request for approval.
- Select the owner as Submitter type.
- Also check the setting to recall the approval requests.

Define Approval Steps- (Steps to Create):

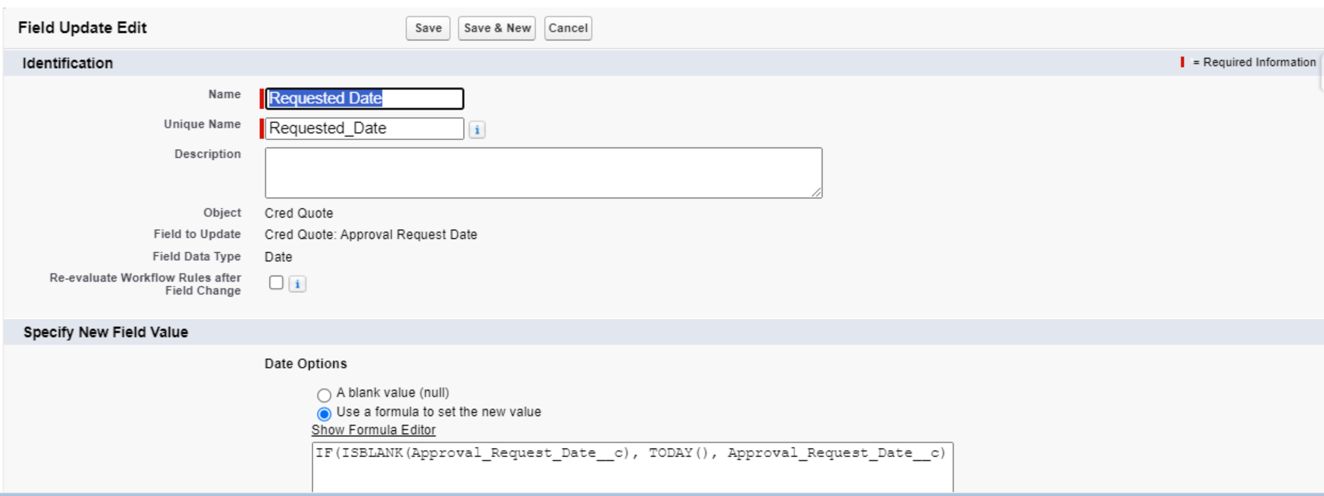
All Action are already present in the workflow section you have to choose the existing option and the following action as defined below:-

- **Initial Submission Actions -** Click on **Add Existing** and select the following :
  There are fields on Cred Quote objects which are needed to be updated (as they are referenced in email alerts and keeping a track for approval requests).From the available list choose the followings:-

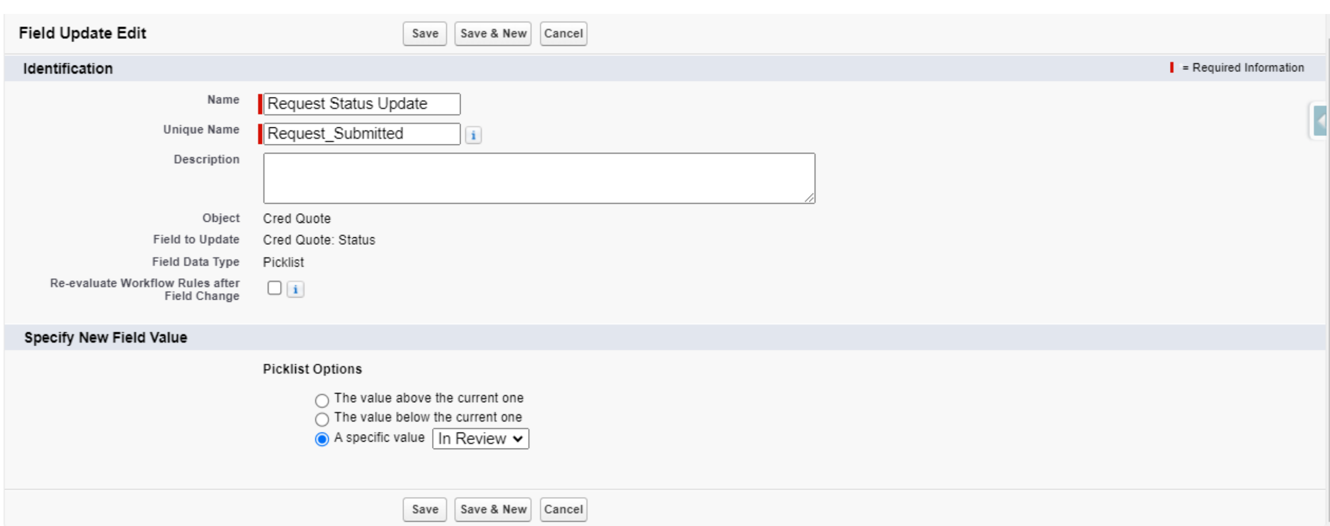
  - **Requested Date (Field Update): (Add Existing) – then add the following**

    There is a field name Approval Requested Date on Cred Quote which is updated with the same date when the approval process triggers.

    Formula Criteria: - **'IF(ISBLANK(CTQ__Approval_Request_Date__c), TODAY(), CTQ__Approval_Request_Date__c)'**



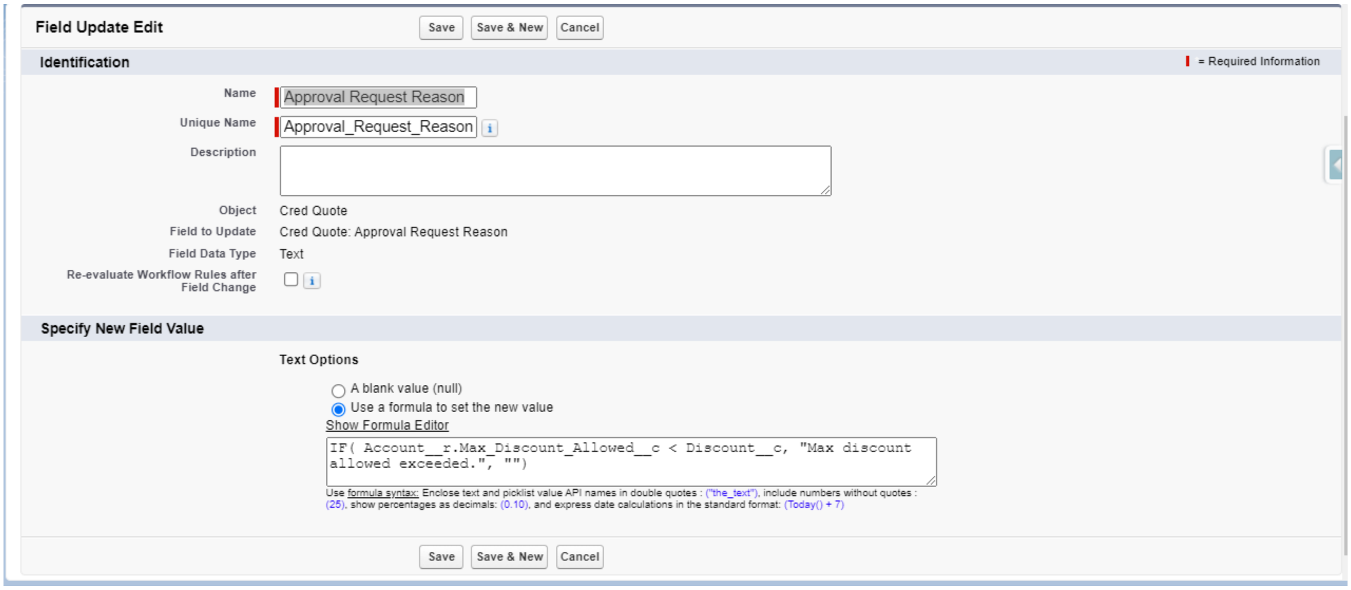
  - **Request Status Update (Field Update):**Whenever the approval process request submitted then the quote status must also be updated to '**In Review'**



- **Approval Request Reason(Field Update): (Add Existing) – then add the following**

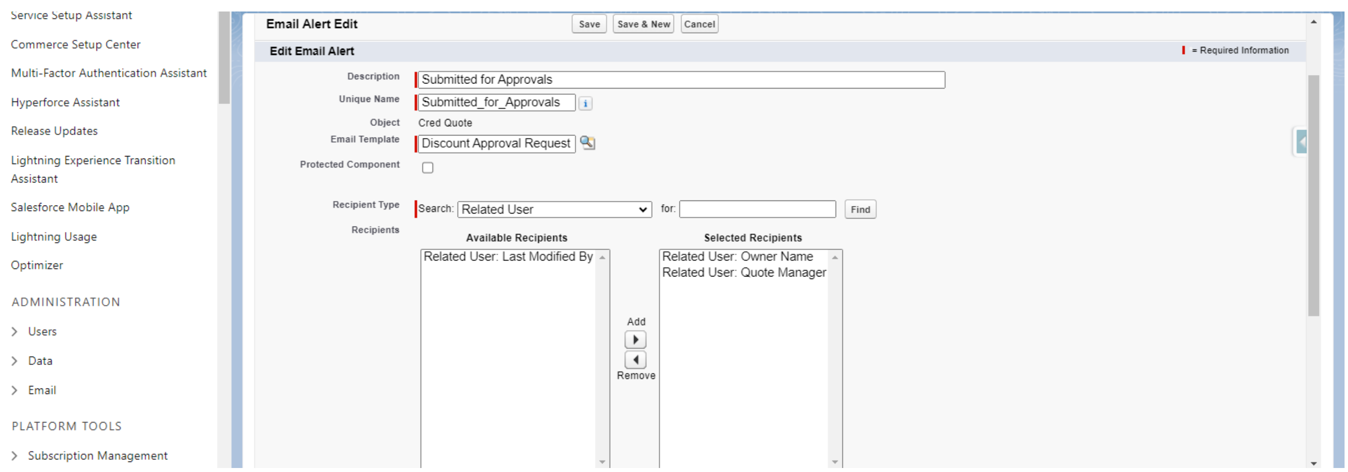
  There is a field name Approval Request Reason on Cred Quote which is updated with the approval reason when the approval process triggers.

  Formula Criteria: - **'IF(CTQ__Account__r.CTQ__Max_Discount_Allowed__c < CTQ__Discount__c, "Max discount allowed exceeded.", "")'**



- **Alert Submitted For Approval (Email Alert): (Add Existing) – then add the following**

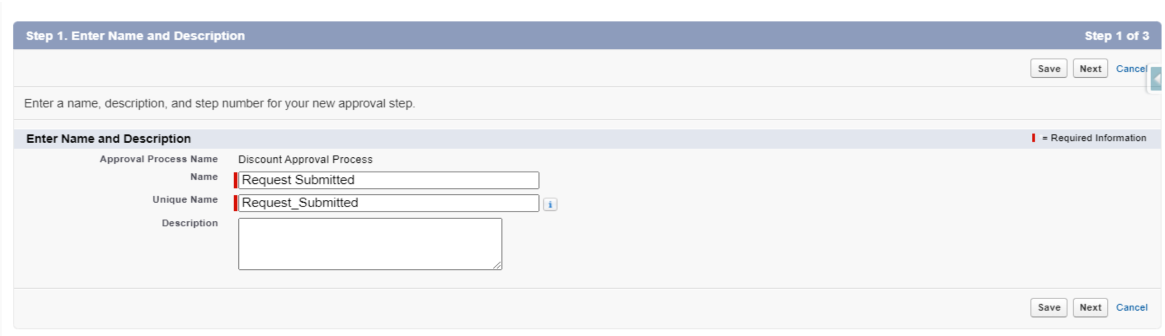
  Set up the Email Template that to be send to Account/ Quote Manager (Email Template: **Discount Approval Request** from Cred CPQ Email Folder)



- **Approval Steps:*(Steps to Create)- You have to create a new approval step:***

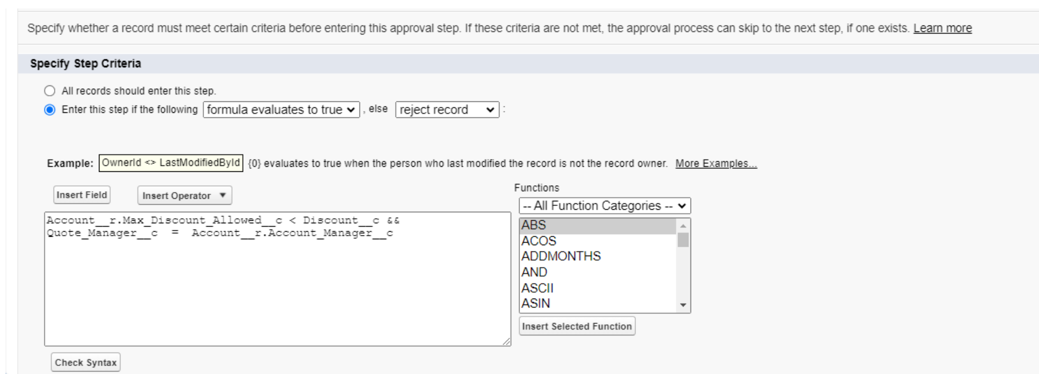
  Configure the approver to be the account manager referenced in the Account Manager field on the Cred Quote object and the max discount limit.

1. Enter the name and description for the approval step



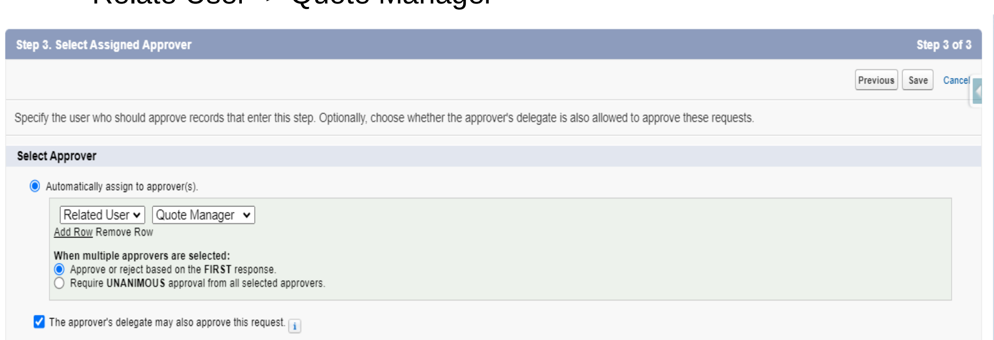
2. Specify whether a record must meet certain criteria before entering this approval step

   Formula:- **"CTQ__Account__r.CTQ__Max_Discount_Allowed__c < CTQ__Discount__c && CTQ__Quote_Manager__c = CTQ__Account__r.CTQ__Account_Manager__c"**



3. Step 3. Select Assigned Approver

   Relate User -> Quote Manager



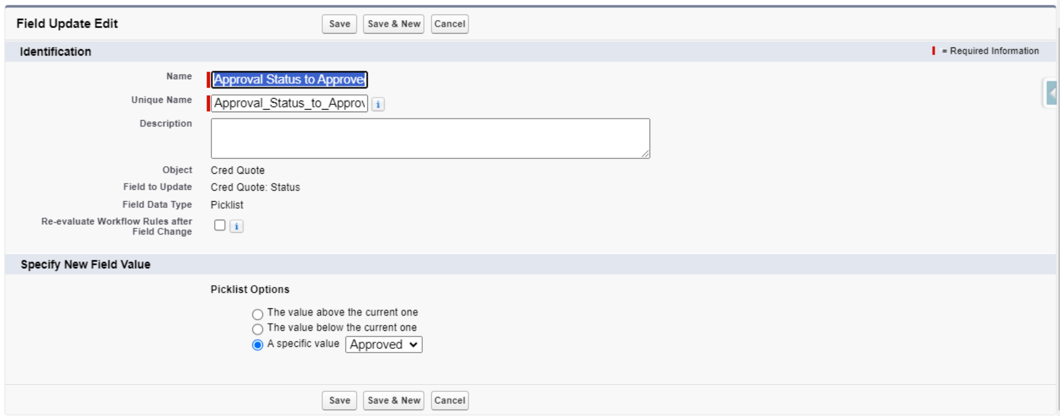
Based on the Approval Step, there are 2 action :

- ❖ **Approval Actions:-** Click on **Add Existing** and select the following :

  ➢ ***Approval Status to Approved:(Field Update)*** **(Add Existing) – then add the following**

  Whenever the condition is met and the manager approves the request then, the quote status should be updated to Approved,after which the user can generate the following document.And the Record should be unlocked for further steps,as the status is approved.

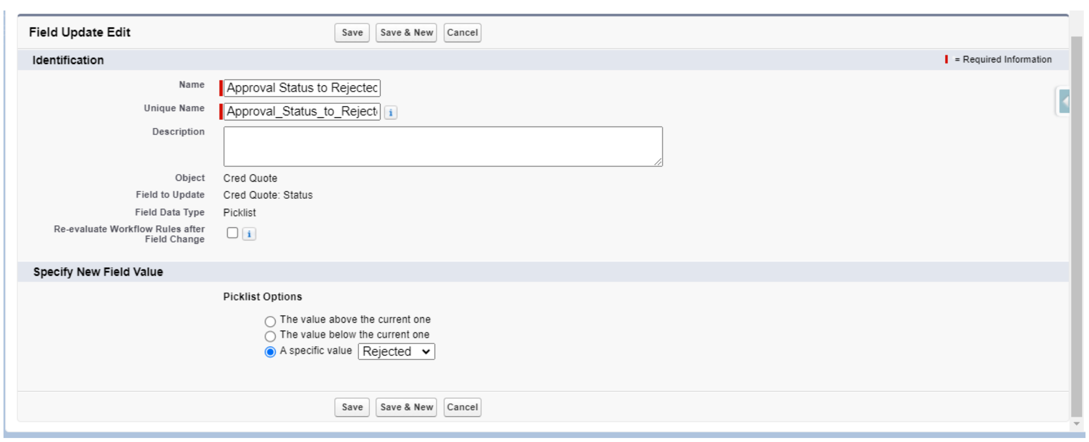
Follow the Steps shown in the image



❖ **Rejection Actions:-**

➢ ***Approval Status to Rejected:(Field Update)* (Add Existing) – then add the following**

Whenever the condition is not met and the manager rejects the request then, the quote status should be updated to Rejected,after which the user can't generate the following document.
And the Record should be locked for further steps,as the status is rejected, they will be required to first change the discount value.

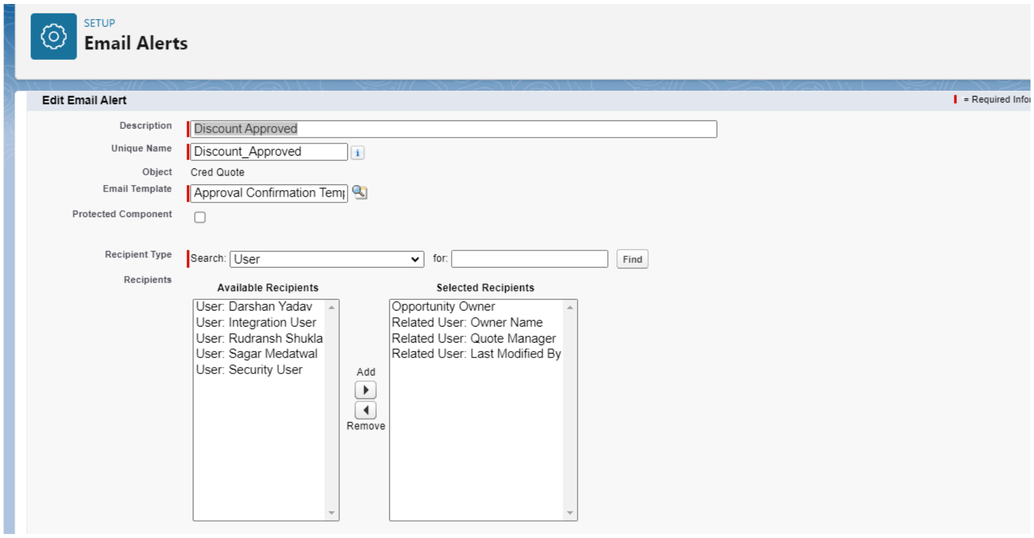


*And at Last the final Approval , Rejection & Recall Action for which choose the **Add Existing** option to add the field update or email alerts.*

❖ **Final Approval Actions**

➢ ***Discount Approved:((Add an Email alert))* (Add Existing) – then add the following**

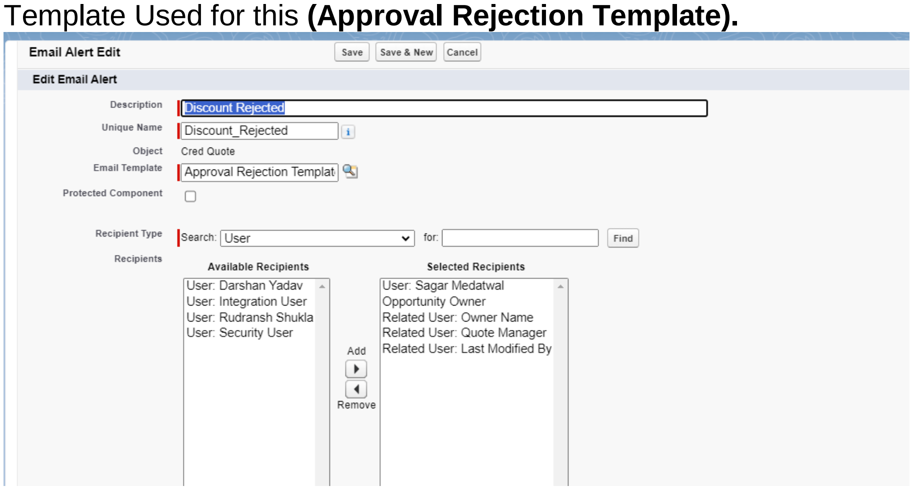
Whenever the discount is approved then an email alert of discount approved is sent to the related user or last modified user(Or Quote Owner).
Template Used for this **(Approval Confirmation Template).**



❖ **Final Rejection Actions**

➢ ***Discount Rejected: (Add an Email alert)*** **(Add Existing) – then add the following**

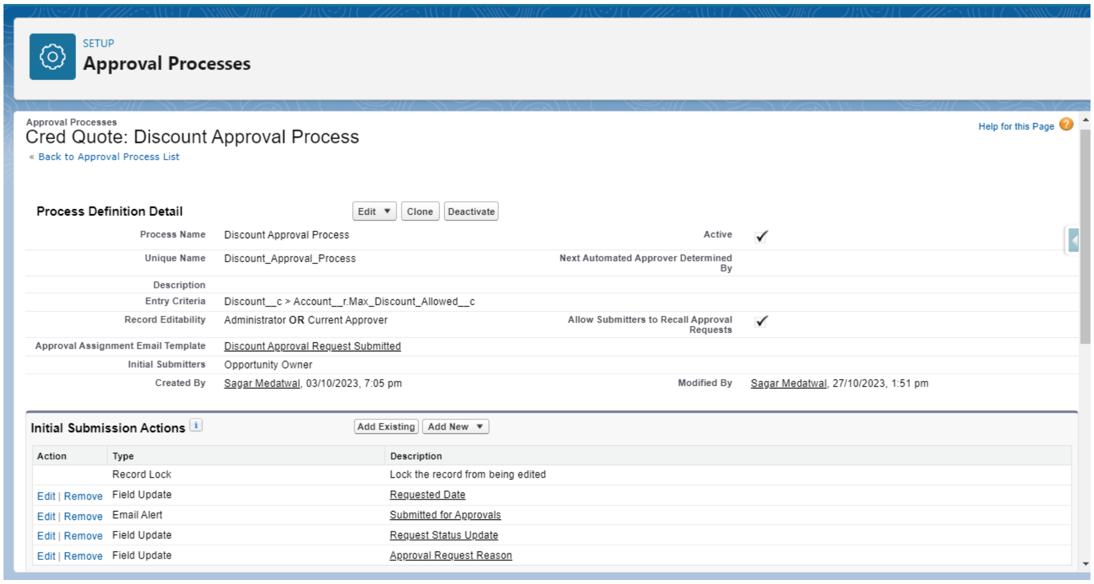
Whenever the discount is rejected then an email alert of the rejected discount is sent to the related user or last modified user(Or Quote Owner).
Template Used for this **(Approval Rejection Template).**

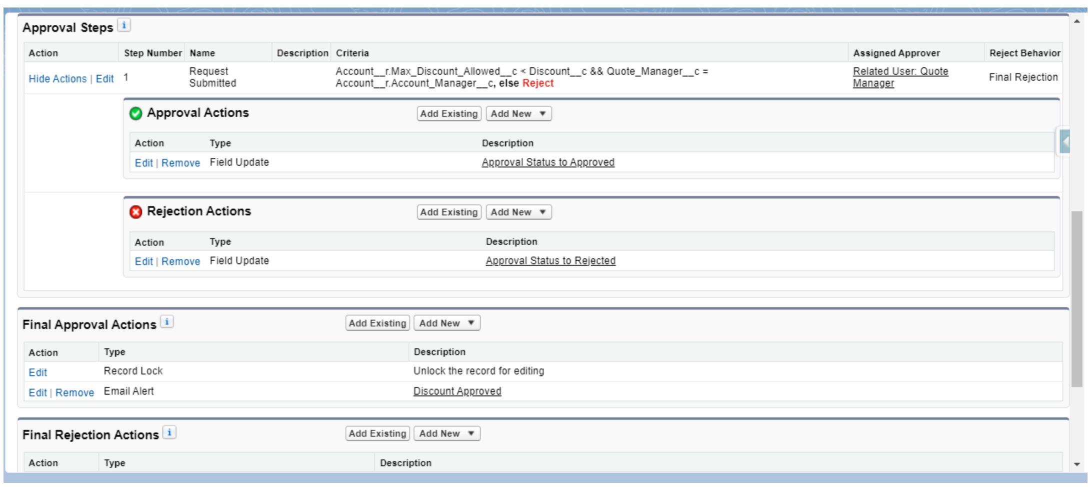


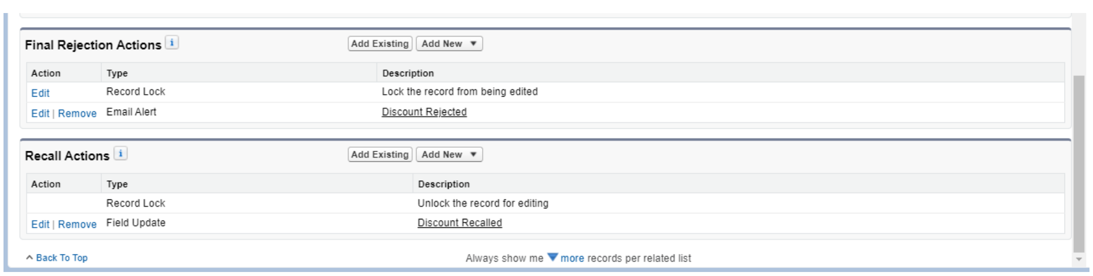
❖ **Recall Actions: (Add Existing) – then add the following**

Whenever the discount request is recalled then the status **field is updated** of cred quote object to '**In Review'**

After successful creation of discount approval process it will look like :-



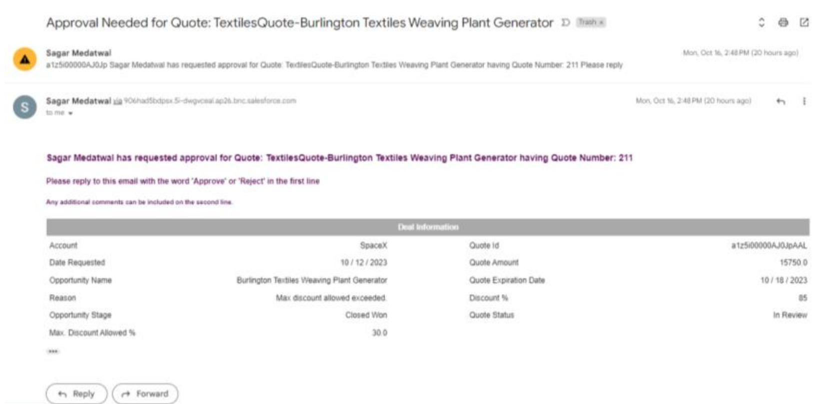




Approval Process:

- When a sales executive creates a Quote with a discount offer,more than the maximum discount allowed for the specific account related to the opportunity,then approval process is triggered.
- The system checks the discount offered against the "Max Discount Allowed" specified in the account associated with the deal.
- It will send Email Alert (Discount Request) to respective users ,(Manager and user creating the record)

- And automatically submits the request to the assigned Quote Manager (Referenced from Account manager field) and cred quote status is updated to **in Review,** instead of being created as a draft.



Manager Review:

- If the offered discount exceeds the allowed limit, the request is automatically sent to the respective account manager for review.
- The manager evaluates the request and decides whether to **approve** or **reject** the proposed discount, according to that the quote is updated if the status is Approved - then Quote status is being converted to Accepted else it will be Rejected and then the user can edit or send file or neither generate the document.
- Managers can also reassign it to other users as per their requirement.

Note:- If the discount request allowed/rejected then another Email alert will be forwarded to the respective sales executive who created the record, or last modified it

All Approval history can be tracked in the related section of the respective Cred Quote object record submitted for the approval.

7 DocuSign Setup (Esign-functionality Configuration)

The Admin must configure the custom metadata data for setting up DocuSign for sending files for ESignature.

JWT: *JSON Web Token, a compact, URL-safe means of representing claims to be transferred between two parties.*

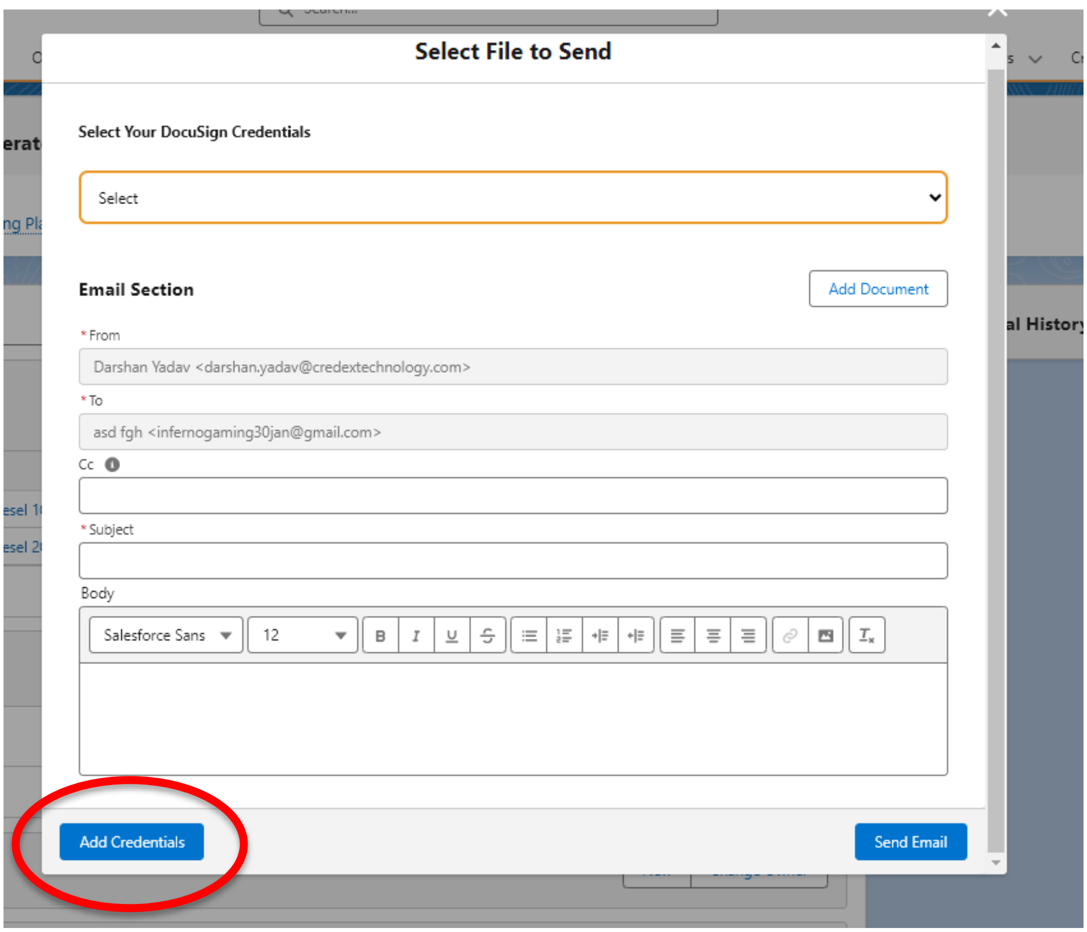
Custom Metadata: *A type of metadata that lets you create custom sets of data and associate them with standard Salesforce metadata components.*

Admin have to ensure the following prerequisites in place:

- Salesforce Developer Account or Production Org.
- DocuSign Developer or Production Account.

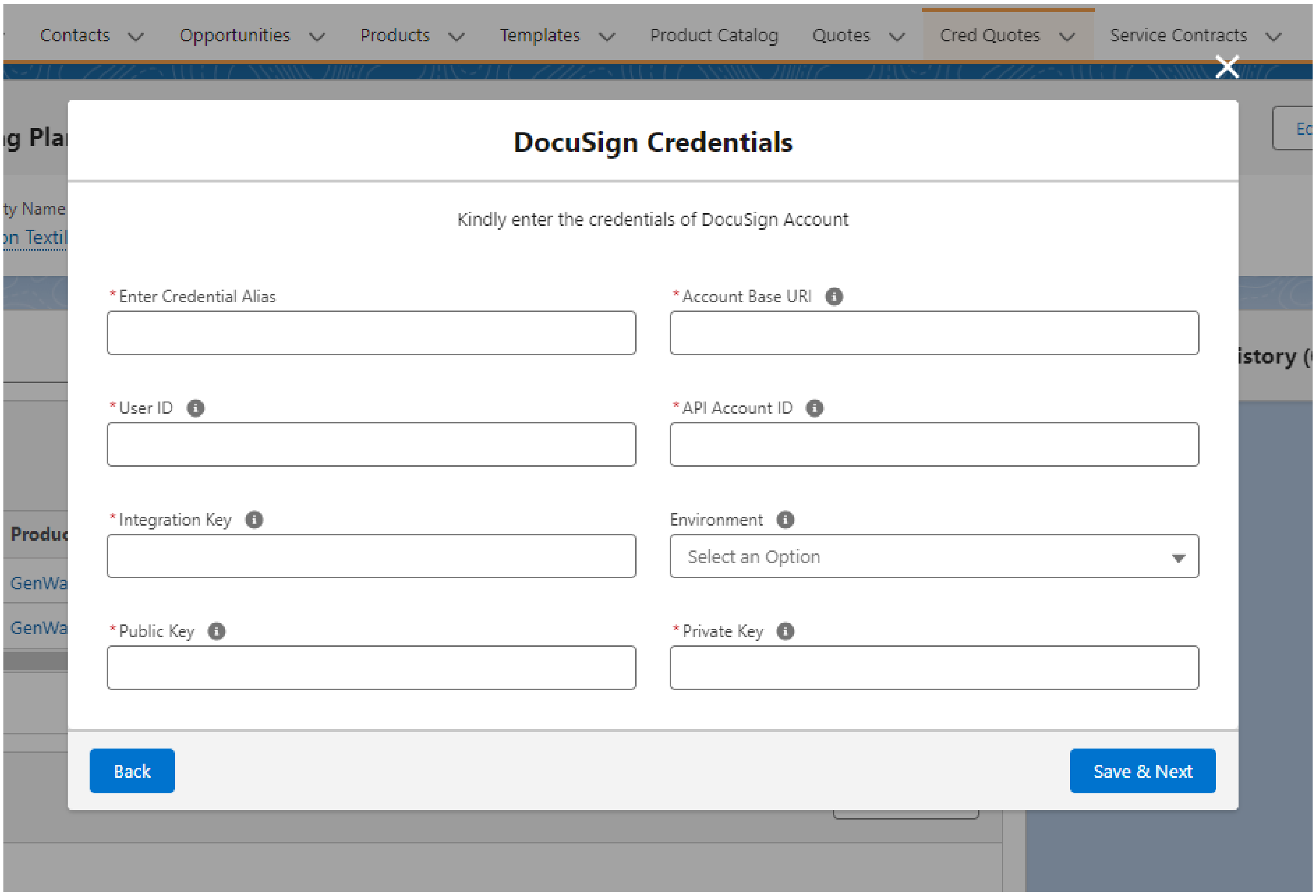
These are the following way to setup the configuration:-

Salesforce admin Side:-



Navigate to any Object (Cred Quote, Service Contract or Cred Invoice) to add the credential or perform the Docu-sign Credentials setup for the first time:-

1. On click of send **email** quick action the above modal shown in the image will pop up.
2. Admin have to click on add credential for the first time to setup the docu-sign credential configuration.
3. Then add the following details obtained from the docusign developer/production account and enter the following details.



As per the above image you have to add credential on click of **ADD CREDENTIAL button**:-

1. The DocuSign Auth.Provider custom metadata type have the required fields created to store DocuSign authentication parameters (such as..., Integration Key, Private Key, Account Base URL, Active, API Account ID, Public Key, Environment, UserID).
2. And there is an **Environment field** which states whether the credentials are for developer or production account.
3. On click of **save & next button,** it will automatically Active the credential states that which record must be active for e-sign time.

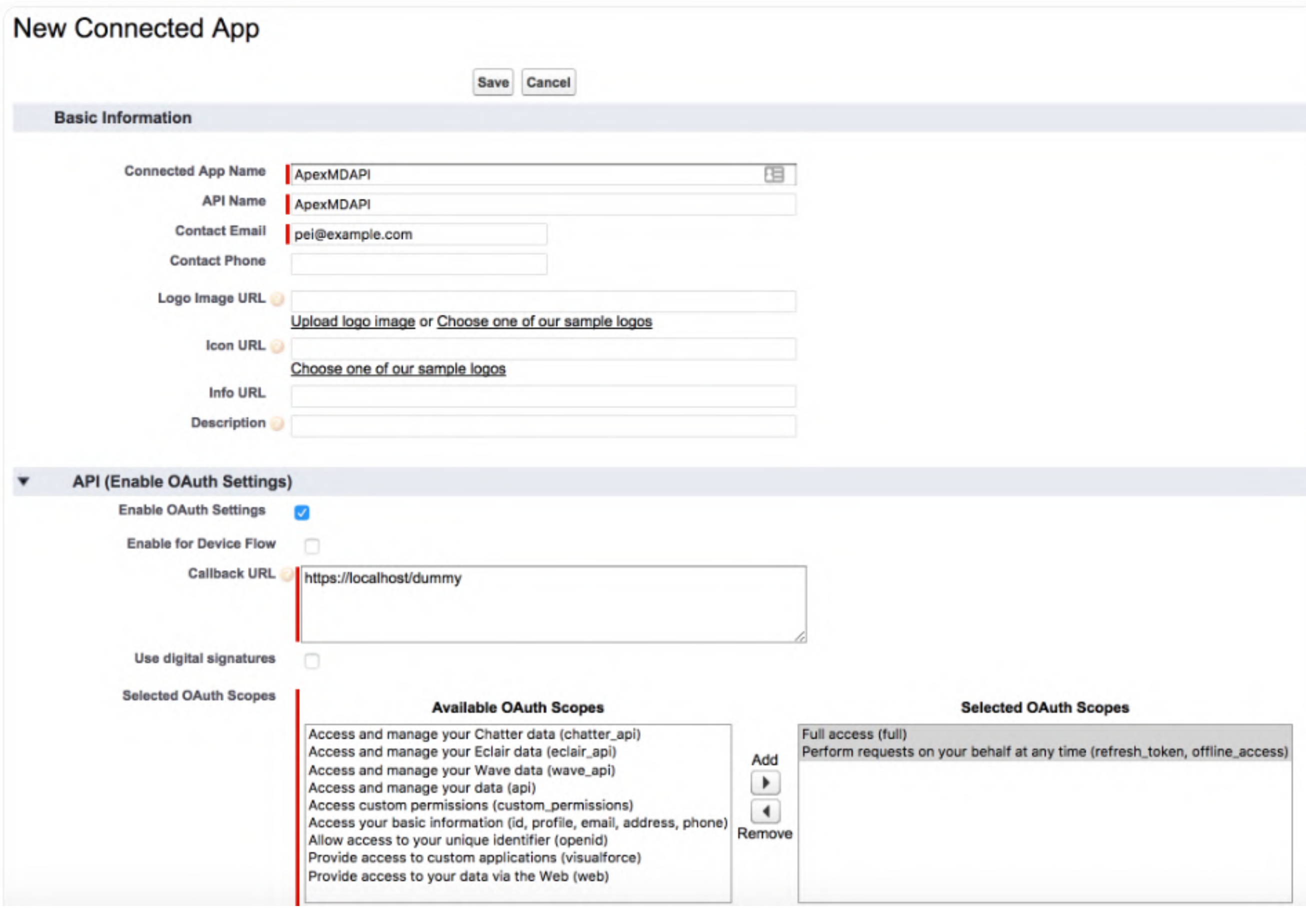
Note: After successful adding the following admin can reload to see the updates if the change are not visible at the time selecting the credentials:

Very key point below to activate the functionality: -

Before that admin also need to setup the OAuth access for the user as pre-requisite for sending and creating the credentials:

Step 1: Creating a Connected App

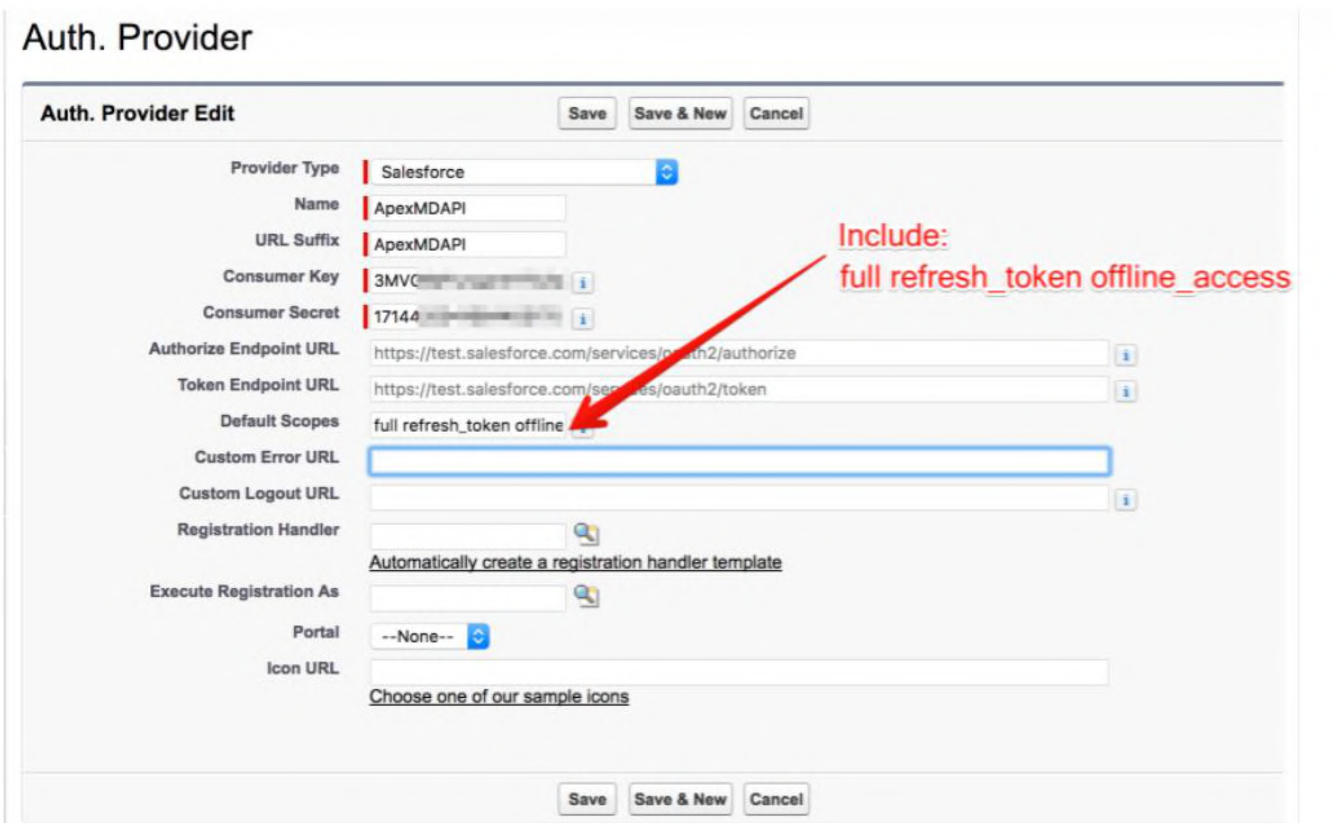
1. To begin, we will create a Connected App. In Setup, navigate to Create > Apps and click the "New" button in the Connected Apps related list.
2. Give your app a name; specify a placeholder Callback URL (we'll update this later).
3. Ensure you choose the "full" and "refresh_token, offline_access" OAuth Scopes.
4. The latter is important to allow Named Credentials to refresh your access_token when the session expires.



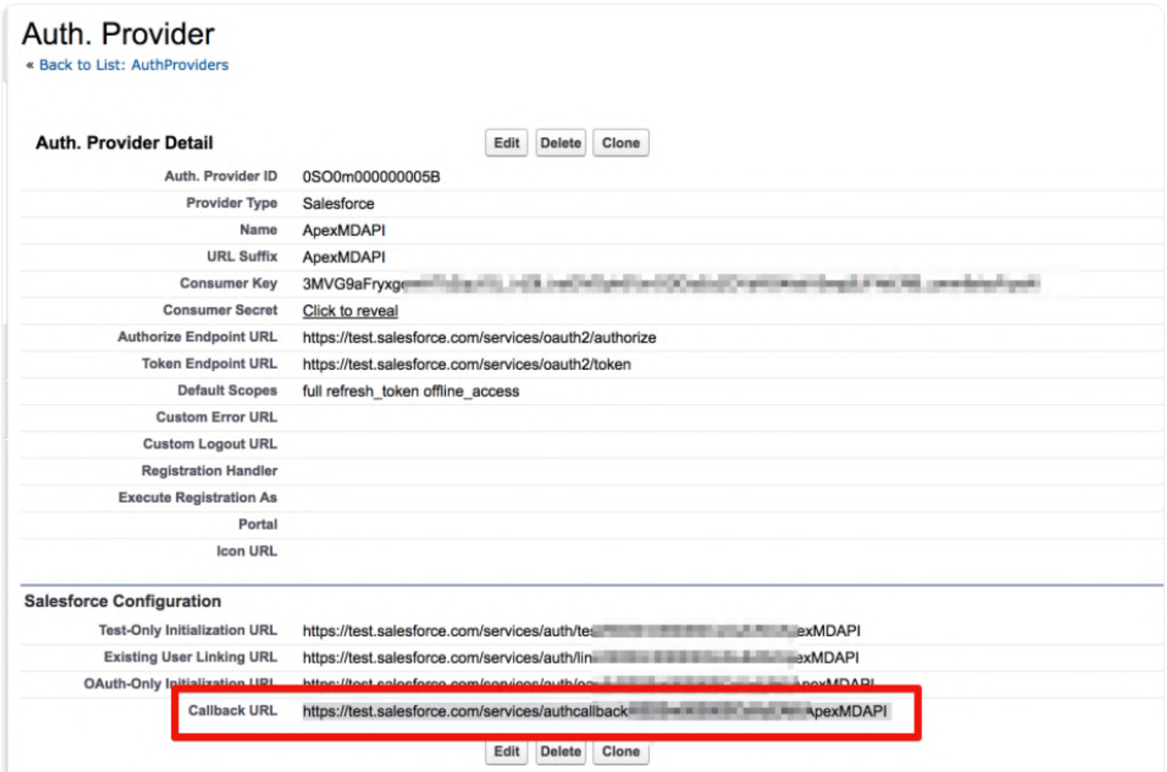
After saving the connected app, make a note of the **Consumer Key and Consumer Secret** that is generated. We'll need these shortly.

Step 2: Creating an Auth. Provider

1. The authentication provider is utilized to facilitate the authentication with your Salesforce org. In Setup, navigate to Security Controls > Auth. Providers and click the "New" button in the related list.
2. Give your Auth. Provider a name, and paste in the Consumer Key and Consumer Secret from your Connected App.
3. For Authorization Endpoint Enter this URL-**https://login.salesforce.com/services/oauth2/authorize** And token Endpoint URL: - **https://login.salesforce.com/services/oauth2/token.**
4. Enter the scopes as specified before: **full refresh_token offline_access**
5. Leave all other fields blank as per the screenshot above and save.



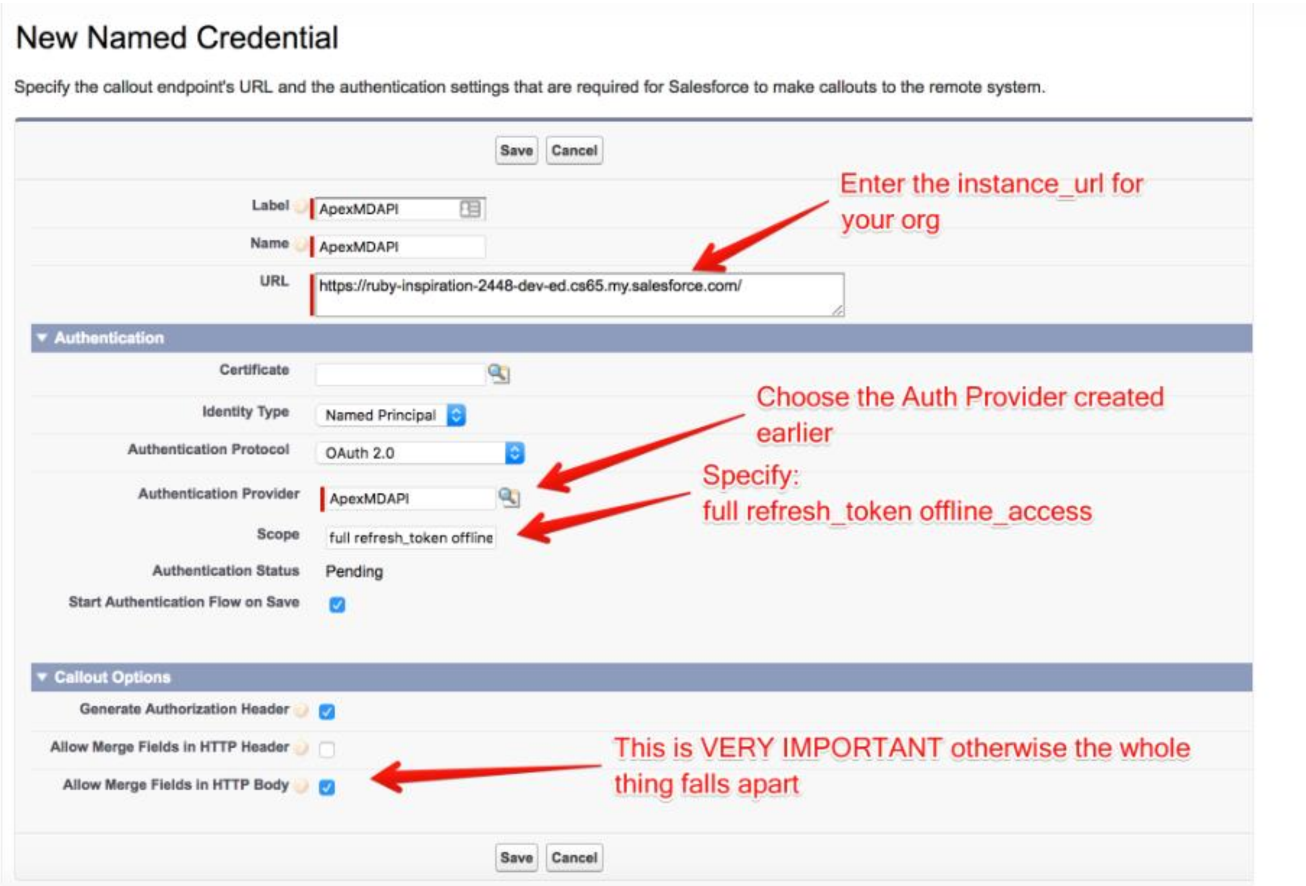
Next, we need to update our Connected App with the correct Callback URL.



Copy and paste the Callback URL, edit the Connected App we created earlier, and paste it into the Callback URL under the OAuth section.

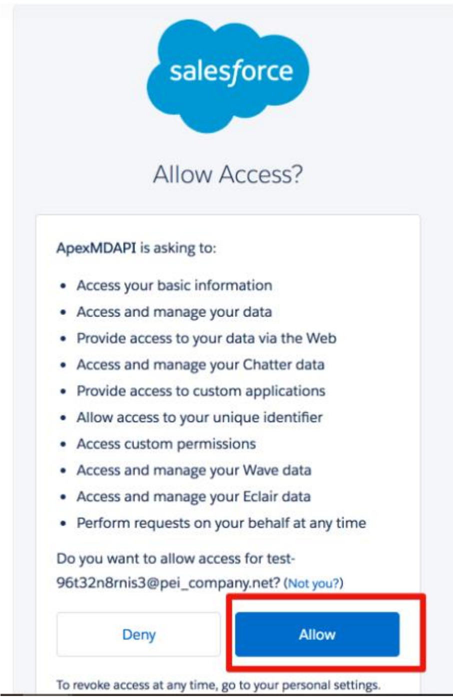
Save the Connected App. At this point, you may need to wait a few minutes to allow the settings to take effect and propagate throughout Salesforce's infrastructure.

Step 3: Creating a Named Credential



1. In Setup, navigate to Security Controls > Named Credentials.
2. **Give your Named Credential as Docusignauthaccess name – We'll need this name to be exactly same as mentioned when modifying Apex code.**
3. Enter your org's instance URL – this will be the URL for your instance (e.g. na1.salesforce.com), or if you are using My Domain, your fully qualified My Domain domain, (e.g. mycompany.my.salesforce.com)
4. Under Identity Type, choose Named Principal. This assumes you will have one user (e.g. a "System User") that will be executing all of the Metadata API interactions. Change this if your situation is different.
5. Choose OAuth 2.0 for Authentication Protocol.
6. **Choose the Auth Provider you created earlier for Authentication Provider.**
7. In the "Scope" field, specify full refresh_token offline_access.

8. Make sure you tick the “Allow Merge Fields in HTTP Body” checkbox. We rely on these merge fields(opens in a new tab) to call the Metadata API as the authentication details are part of the HTTP body and not in the standard HTTP Authorization header.
9. **Tick “Start Authentication Flow on Save” and select Save.**



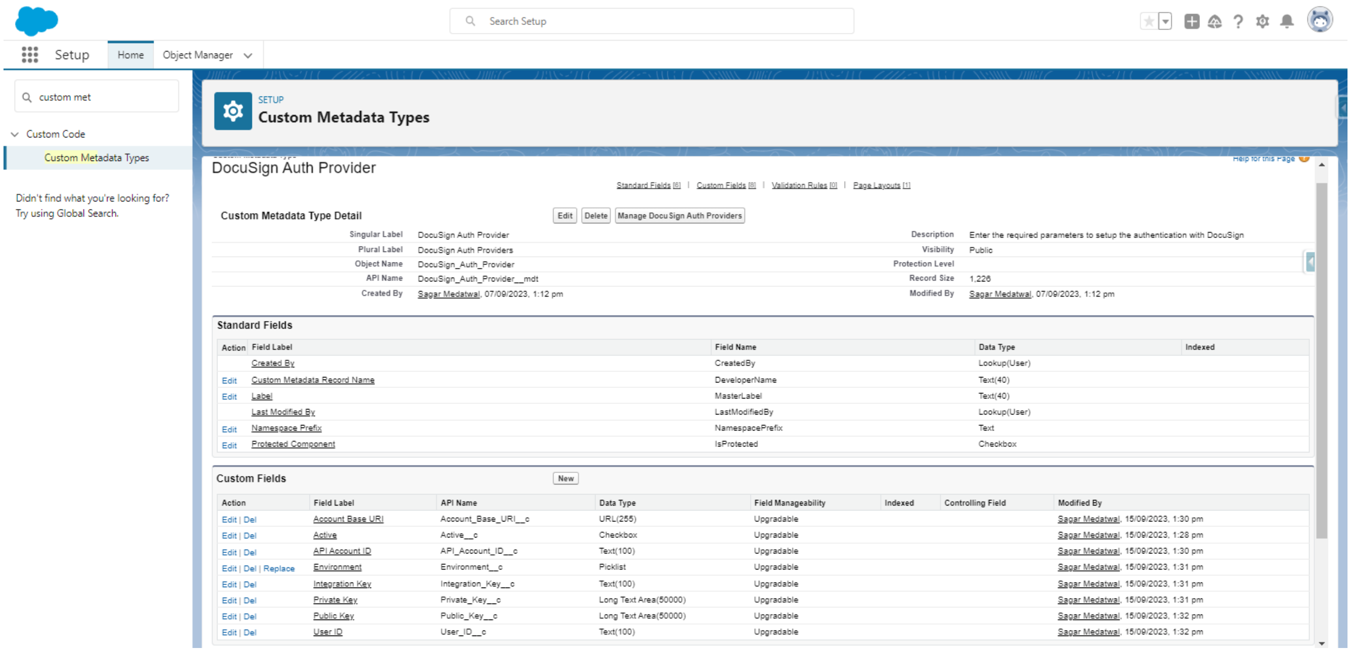
You will be prompted to log in to your org. After you log in, you will see the connected app authorization screen similar to the following.

Allow access to this app (your app). Once complete, you should be redirected back to the Named Credential screen and see that the status is now set to “Authenticated as….”.

And all steps are now completed now you can work seamlessly with sending e-sign file as docusign is successfully configured.

Docusign Developer Side:-

1. Log in to your DocuSign Dev. Account.”https://developers.docusign.com/”
2. Navigate to My Apps and Keys, Under the “My Account Information” Section, you can find the **Account Base URI, API Account ID as well as User ID.**
3. Click on the "Add App + Create Integration Key" button.



Configure the integration key:

- Provide a name and description for your integration key.
- Select the appropriate account type (Developer or Production) depending on your needs.
- Under the "Authentication" section, choose the authentication method that suits your requirements (Implicit Grant).Configure the remaining settings as per your preferences.
- Under the “Service Integration” section Click on the Generate **RSA Keypairs (ID)**
- It will give you a Public Key as well as a Private Key, Copy both of these keys to a safe location, they will not be displayed again.
- Under the additional setting, click on the Redirect URI and add the callbackURL of your Salesforce Domain which will give you consent to allow file transfer.
- And click Save.

Note:- All the marked fields must be copied and used as the record values for the DocuSignAuth Provider Custom metadata. Also all the required fields values must be entered without the comments (Public and Private key).