



SOLUNUS
Enabling Customer Success

CPQ LITE (Admin User Manual)



REVISION HISTORY

Version No.	Release Date	Author	Details Of Changes	Reviewed By	Approved By
1.0		Vamsi Thiyyagura	Initial Version		

Contents

OVERVIEW	5
HOW TO ACCESS THE APPLICATION?	6
PRODUCT OVERVIEW	8
NON-SUBSCRIPTION / ONE-TIME PRODUCT CONFIGURATION	8
HOW TO CREATE ONE TIME PRODUCTS?	8
SUBSCRIPTION PRODUCTS CONFIGURATION	9
HOW TO CONFIGURE SUBSCRIPTION PRODUCTS?	9
BUNDLE PRODUCT CONFIGURATION	10
HOW TO CONFIGURE A BUNDLE PRODUCT?	11
PRODUCT PRICING OVERVIEW	19
PRODUCT PRICING STAGES.....	19
STAGE 1 – LIST PRICE	19
PRICING METHODS	19
PRICING METHOD CONFIGURATION – LIST PRICE	20
CREATE A PRICE BOOK.	20
ADD PRICE BOOK ENTRIES	22
ADDING LIST PRICE FROM THE PRODUCT	23
SET LIST PRICING METHOD FOR A PRODUCT.....	25
PRICING METHOD CONFIGURATION – BLOCK PRICE.....	26
HOW TO CONFIGURE A PRODUCT TO HAVE BLOCK PRICING?	26
PRICING METHOD CONFIGURATION – PERCENTAGE OF TOTAL (%)	29
HOW TO CONFIGURE A PRODUCT TO HAVE A PERCENT OF TOTAL PRICING?	29
CALCULATIONS – HOW DOES A PRODUCT (ONE TIME/SUBSCRIPTION) GET ITS PERCENT OF TOTAL PRICING?	30
STAGE 2 – PRICING ADJUSTMENTS (IN LIST PRICE)	36
PRODUCT OPTION PRICE OVERRIDE	36
SUBSCRIPTION PRICE PRORATION.....	38
STAGE 3 – DISCOUNTED PRICE (SYSTEM GENERATED).....	40
PRODUCT OPTION DISCOUNT	40
HOW TO CONFIGURE PRODUCT OPTION DISCOUNTS?	40
PRODUCT OPTION DISCOUNTING: IN THE PRODUCT OPTION DETAIL PAGE	41
DISCOUNT SCHEDULES	42
HOW TO CONFIGURE DISCOUNT SCHEDULES?	42
APPLICATION OF DISCOUNT SCHEDULES	46

STAGE 4 – DISCOUNTED PRICE (ADDITIONAL).....47

 HOW TO CONFIGURE ADDITIONAL DISCOUNTS?47

STAGE 5 – NET PRICE48

OVERVIEW

Welcome to the User Manual for CPQ Lite Administrator. This comprehensive guide is designed to assist system administrators in effectively setting up, configuring, and managing the CPQ system to streamline sales processes within your organization.

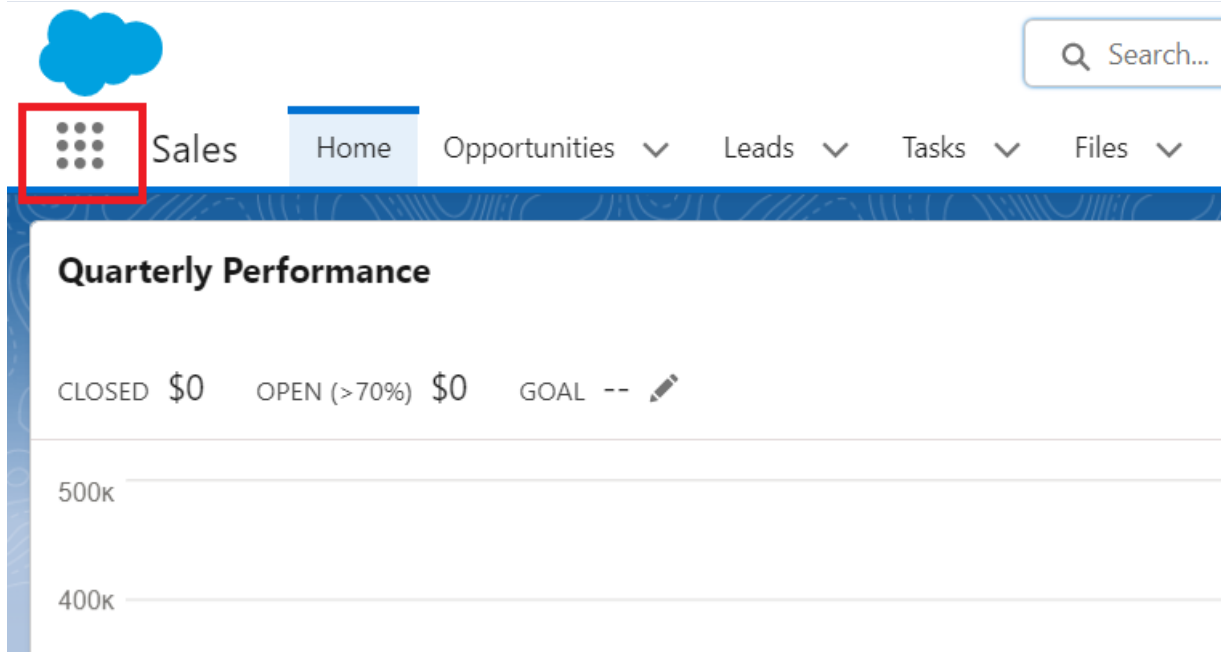
The Manual provides step-by-step instructions on setting up and configuring different types of Products with multiple pricing strategies based on your business needs. You will discover how to define and maintain product catalogs, options, components, pricing, and discounting rules within the CPQ system.

We hope this User Manual serves as a valuable resource in navigating and harnessing the full potential of CPQ Lite. Let's embark on this journey of empowering your organization's sales operations and achieving increased efficiency and productivity!

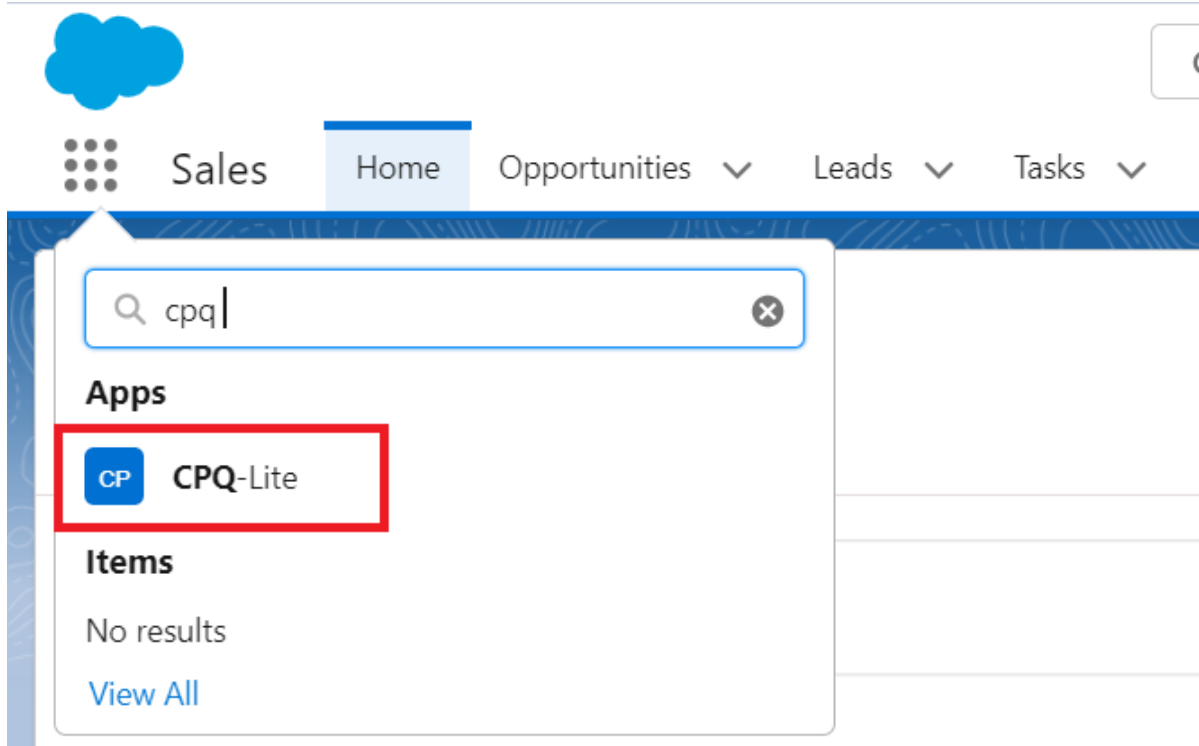
HOW TO ACCESS THE APPLICATION?

You can access the application from the App Launcher.

- Navigate to the App Launcher icon in the top left corner of your screen.



- Search for CPQ-Lite and select it under the Apps section.



This will open the application for you.

PRODUCT CONFIGURATION

PRODUCT OVERVIEW

CPQ Lite supports three types of products.

1. Non- Subscription Products / One-time Products
2. Subscription Products
3. Bundle Products

Non-subscription products – These are one-time products; Customers will come and buy at the same time. During contract creation, non-subscription products convert to an **Asset**). Assets are the records of non-subscription products that were quoted or sold to customers.

Subscription Products - These are usually services set up to run for a determined period, such as a month or a year. So, the customer is billed on a recurring schedule. During contract creation, these products convert to Subscription records. You can tell that a product is a subscription if the *Subscription Pricing* field is populated (Fixed or Percent of Total)

- *Fixed Price Subscription Products* – These products get their list prices from the price book.
- *Percent of Total Subscription Products* – get their list prices as a percentage of the quote.

Bundle Product - A Product Bundle is a combination of different products and services that are sold to consumers as one combined product or service package.

NON-SUBSCRIPTION / ONE-TIME PRODUCT CONFIGURATION

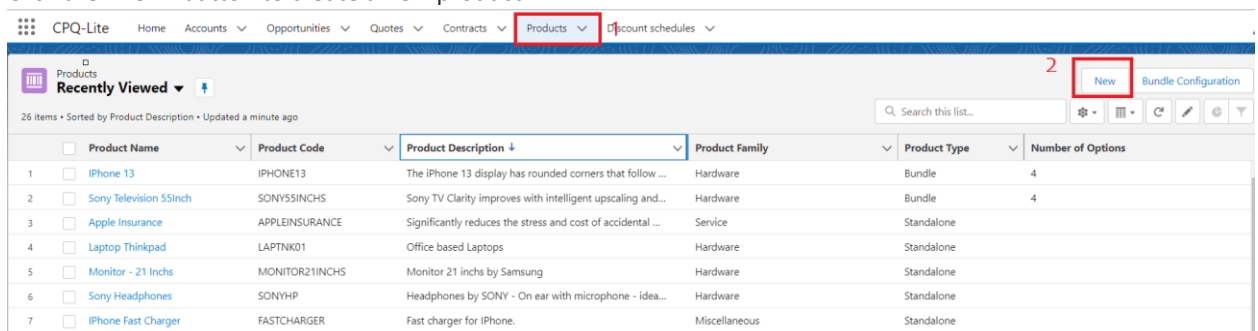
These are one-time products; These products are sold as a one-time fee. The customer pays for such products upfront and is authorized to use it indefinitely.

During contract creation, non-subscription products convert to an **Asset**). Assets are the records of non-subscription products that were quoted or sold to customers.

HOW TO CREATE ONE TIME PRODUCTS?

To create a Non-subscription or One-time product –

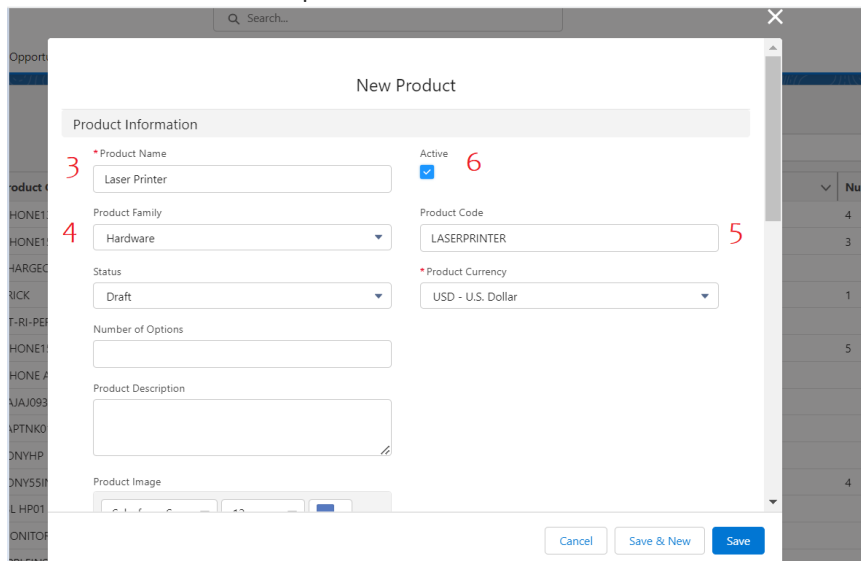
1. Log in to your Salesforce account and navigate to the Products tab.
2. Click the "New" button to create a new product.



	Product Name	Product Code	Product Description	Product Family	Product Type	Number of Options
1	iPhone 13	IPHONE13	The iPhone 13 display has rounded corners that follow ...	Hardware	Bundle	4
2	Sony Television 55inch	SONY55INCHS	Sony TV Clarity improves with intelligent upscaling and...	Hardware	Bundle	4
3	Apple Insurance	APPLEINSURANCE	Significantly reduces the stress and cost of accidental ...	Service	Standalone	
4	Laptop Thinkpad	LAPTNK01	Office based Laptops	Hardware	Standalone	
5	Monitor - 21 Inches	MONITOR21INCHS	Monitor 21 inches by Samsung	Hardware	Standalone	
6	Sony Headphones	SONYHP	Headphones by SONY - On ear with microphone - idea...	Hardware	Standalone	
7	iPhone Fast Charger	FASTCHARGER	Fast charger for iPhone.	Miscellaneous	Standalone	

3. Enter the product name and a brief description.
4. Set the product family if applicable. This is a grouping of related products.
5. Set the product code if applicable. This is a unique identifier for the product.

- Set the active status of the product.



- Add any custom fields or information that may be needed.
- Save the product.

Set the pricing information. This includes the unit price, currency, and any price book information – Refer [Pricing Configuration](#)

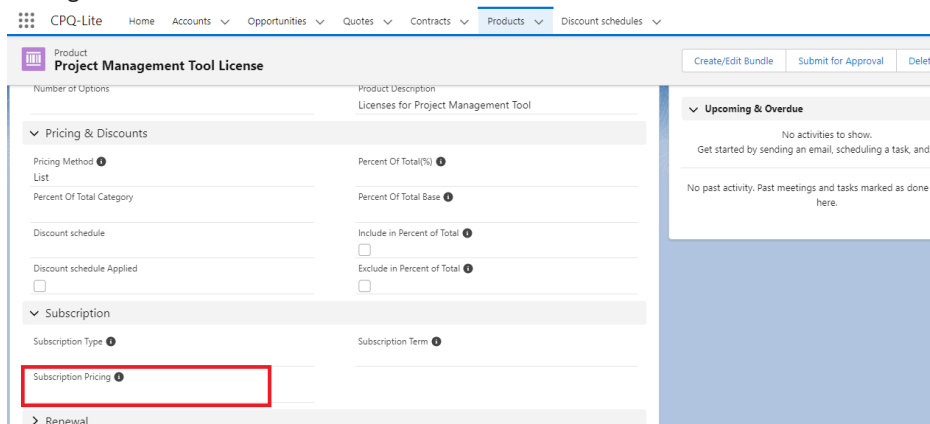
SUBSCRIPTION PRODUCTS CONFIGURATION

A subscription product is just like any other product. With just a few changes, any product you already have in your org can be configured as a Subscription product.

HOW TO CONFIGURE SUBSCRIPTION PRODUCTS?

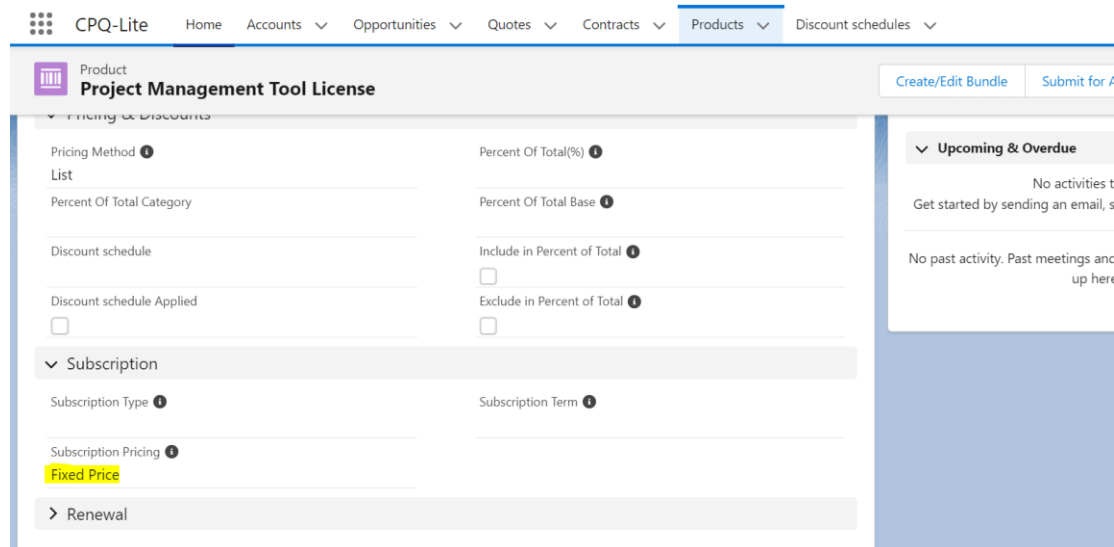
To configure a product as a subscription product –

- Go to the product that you need to change to subscription.
- Scroll down to the subscription section on the product detail page. You will find a field – “Subscription Pricing.”



- Change the Subscription Pricing field to “Fixed Price.”

The Subscription Pricing field is what tells the application to treat a product as a subscription. If it has a value, then CPQ-Lite knows to use time as a factor when calculating the product's prices. If it's left blank (the default), then CPQ-Lite ignores all details about time when calculating prices. For now, we're choosing Fixed Price, which means to use the price book price in calculations.



CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules

Product **Project Management Tool License** Create/Edit Bundle Submit for /

Pricing & Discounts

Pricing Method ¹
List

Percent Of Total Category

Discount schedule

Discount schedule Applied ☐

Percent Of Total(%) ¹

Percent Of Total Base ¹

Include in Percent of Total ¹ ☐

Exclude in Percent of Total ¹ ☐

Subscription

Subscription Type ¹

Subscription Term ¹

Subscription Pricing ¹
Fixed Price

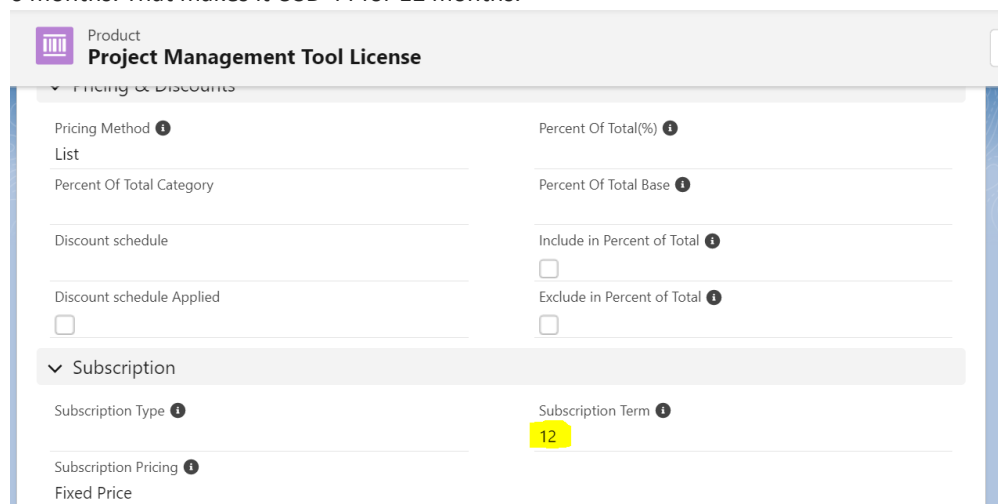
> Renewal

Upcoming & Overdue

No activities t
Get started by sending an email, s

No past activity. Past meetings anc
up here

- Now, in the Subscription Term field enter the number of months you want the subscription to be. Ex – if 12 is entered in the field, you are telling the system to consider the price book price (USD 22) for the product for a period of 12 months. If it is set as 6 months, then the price of the product will be USD 22 for 6 months. That makes it USD 44 for 12 months.



Product **Project Management Tool License**

Pricing & Discounts

Pricing Method ¹
List

Percent Of Total Category

Discount schedule

Discount schedule Applied ☐

Percent Of Total(%) ¹

Percent Of Total Base ¹

Include in Percent of Total ¹ ☐

Exclude in Percent of Total ¹ ☐

Subscription

Subscription Type ¹

Subscription Term ¹
12

Subscription Pricing ¹
Fixed Price

Prorated Pricing –

Please refer [SUBSCRIPTION PRICE PRORATION](#)

BUNDLE PRODUCT CONFIGURATION

A Product Bundle is a combination of different products and services that are sold to consumers as one combined product or service package.

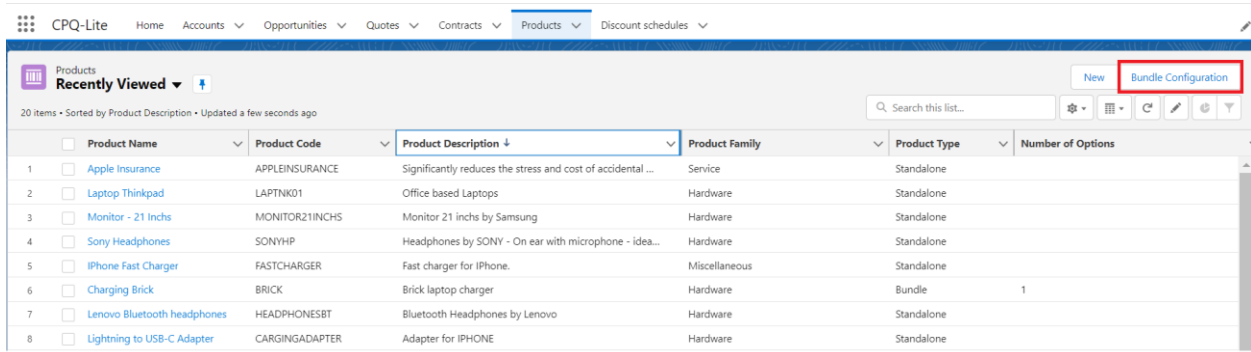
HOW TO CONFIGURE A BUNDLE PRODUCT?

To configure a product as a bundle, there are two ways-

1. From the product list view
2. From the product detail page

From the product list view

To configure a bundle product from the list view, click on “Bundle Configuration” button.

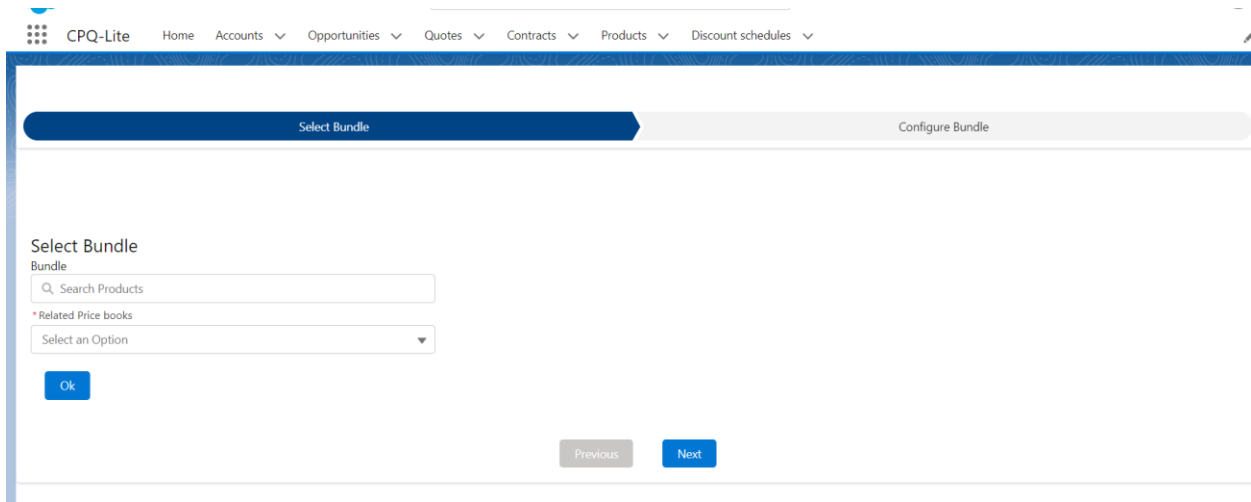


	Product Name	Product Code	Product Description	Product Family	Product Type	Number of Options
1	Apple Insurance	APPLEINSURANCE	Significantly reduces the stress and cost of accidental ...	Service	Standalone	
2	Laptop Thinkpad	LAPTNK01	Office based Laptops	Hardware	Standalone	
3	Monitor - 21 Inchs	MONITOR21INCHS	Monitor 21 inchs by Samsung	Hardware	Standalone	
4	Sony Headphones	SONYHP	Headphones by SONY - On ear with microphone - idea...	Hardware	Standalone	
5	iPhone Fast Charger	FASTCHARGER	Fast charger for iPhone.	Miscellaneous	Standalone	
6	Charging Brick	BRICK	Brick laptop charger	Hardware	Bundle	1
7	Lenovo Bluetooth headphones	HEADPHONESBT	Bluetooth Headphones by Lenovo	Hardware	Standalone	
8	Lightning to USB-C Adapter	CARGINGADAPTER	Adapter for IPHONE	Hardware	Standalone	

This button opens a Bundle Configurator.

Bundle Configurator

In the bundle configurator, select a product for which you want to create a bundle of. This will be the parent product.



CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules

Select Bundle Configure Bundle

Select Bundle

Bundle

Q Search Products

*Related Price books

Select an Option

Ok

Previous Next

Select a price book and click on OK.

Select Bundle

Select Bundle

Bundle

* Related Price books

Select an Option

India Pricelist

Standard Price Book

Americas

Previous
Next

Clicking on “OK” displays the basic information about the product.

Click on “Next”.

Select Bundle

Bundle

* Related Price books

Americas

OK

▼ Bundle Information

Name

iPhone 13

☒ Active

Family

Hardware

Product Code

IPHONE13

▼ Pricing Information

List Price	Total Price of Bundle
1200	1200

 **Current Options**

ProductName	Optional Product	Quantity	UnitPrice	Discount

Previous
Next

Select the products which you want to configure as product options to the parent product selected above.

 **Select Products**

Product Code

Product Family

Select Product Family

☐ Product Name	☐ Product Code	☐ Family	☐ Type	☐ Description	☐ List Price
☐ iPhone 13	IPHONE13	Hardware	Bundle		1200
☐ JBL Head Phone	JBL HP01	Hardware	Standalone		225
☐ Apple Insurance	APPLEINSURANCE	Service	Standalone	Significantly reduces the stress and cost ...	120
☐ iPhone 13 Case	IPHONE13CASE	Hardware	Standalone		10
☐ Sony Headphones	SONVHP	Hardware	Standalone	Headphones by SONY - On ear with micr...	50
☐ Monitor - 21 Inches	MONITOR21INCHS	Hardware	Standalone	Monitor 21 inches by Samsung	150
☐ Lenovo Bluetooth Mouse	BLUETOOTHMOUSE	Hardware	Standalone	Bluetooth mouse	10
☐ Laptop Bag 13inch	BAG13INCH	Consumable	Standalone	13inch Laptop Bag	30
☐ Lenovo Bluetooth headphones	HEADPHONESBT	Hardware	Standalone	Bluetooth Headphones by Lenovo	20
☐ Laptop Installation	INSTALLATION		Standalone	Laptop installation for Lenovo	20

< Previous
Page 1 of 23
Next >

Select Products

You can even search for a particular product based on its name, description or even product code. Use Product family filter to filter the products based on product family.

Select and click on “*Select Products*” button.

Select Products

Search: charger

Product Code: Product Family:

Product Name	Product Code	Family	Type	Description	List Price
☐ Charging Brick	BRICK	Hardware	Bundle	Brick laptop charger	50
☒ iPhone Fast Charger	FASTCHARGER	Miscellaneous	Standalone	Fast charger for iPhone.	30
☒ Lightning Charge Cable 1m	CHARGECABLE1M		Standalone		20
☐ samsung charger	SAMSUNG12	Hardware	Bundle		60

< Previous Page 1 of 1 Next >

Select Products

Specify the quantity.

S.No	Product Name	Quantity*	List Price	Unit Price	Discount %	Net Unit Price	Net Sale Price	Total Price
☒ 1.	iPhone Fast Charger	1	30	30		30	30	30
☒ 2.	Lightning Charge Cable 1m	1	20	20		20	20	20
☒ 3.	Apple Insurance	1	120	120		120	120	120

Save & Close **Save**

Option Discount - Specify the discount %. Notice that the Net Unit price changes to 60 from 120.

S.No	Product Name	Quantity*	List Price	Unit Price	Discount %	Net Unit Price	Net Sale Price	Total Price
☒ 1.	iPhone Fast Charger	1	30	30		30	30	30
☒ 2.	Lightning Charge Cable 1m	1	20	20		20	20	20
☒ 3.	Apple Insurance	1	120	120	50	60	60	60

Save & Close **Save**

Product Option Price Override - You can even change the Unit Price of a product option. Use the "Unit Price" field on the product option configurator to override the price book price. Just enter a price in the Unit Price and it will override the price coming the price book. For example – Let us make the unit price as 150. This will calculate the discount on top of 150.

Notice how the price changes in the below screen shot.

S.No	Product Name	Quantity*	List Price	Unit Price	Discount %	Net Unit Price	Net Sale Price	Total Price
☒ 1.	iPhone Fast Charger	1	30	30		30	30	30
☒ 2.	Lightning Charge Cable 1m	1	20	20		20	20	20
☒ 3.	Apple Insurance	1	120	150	50	75	75	75

Save & Close **Save**

Now, click on the “*Save*” button to save the records. The product options can be seen being created in the current options section. You can also click on “*Save and Close*” if you do not want to add any further records.

CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules

Success Record Successfully Created

Product Name	Optional Product	Quantity	Unit Price	Discount
PO-001367	iPhone Fast Charger	1	30	
PO-001368	Lightning Charge Cable 1m	1	20	
PO-001369	Apple Insurance	1	150	50

Check the same in the "Product Option" related list of the parent product.

Check the same in the "Product Option" related list of the parent product.

Products > iPhone 13

Product Option

3 items • Sorted by Optional Product Type • Updated a few seconds ago

Option Name	Optional Product	Discount (%)	Unit Price	Optional Product Type	Pricebook Name	Product option type
PO-001367	iPhone Fast Charger		USD 30.00	Standalone	Americas	
PO-001368	Lightning Charge Cable 1m		USD 20.00	Standalone	Americas	
PO-001369	Apple Insurance	50%	USD 150.00	Standalone	Americas	

From Product Detail Page

Another way to configure a bundle product is from the product detail page.

- Go to a specific product that you want to create a bundle of.
- In the selected product detail page, click on **"Create/Edit"** button.

CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules

Product **iPhone 13**

Create/Edit Bundle Submit for Approval Delete

Product Code: IPHONE13 Product Family: Hardware Product Type: Bundle Number of Options: 3

Details Related

Product Information

Product Name: iPhone 13 Active: ☒

Product Family: Hardware Product Code: IPHONE13

Product Type: Bundle Product Currency: USD - U.S. Dollar

Number of Options: 3 Product Description: The iPhone 13 display has rounded corners that follow a beautiful curved design, and these corners result in a standard

Related List Quick Links

- Price Books (3)
- Product Option (3)
- Subscriptions (0)
- Block Prices (2)
- Files (0)

Filters: All time • All activities • All types Refresh Expand All View All

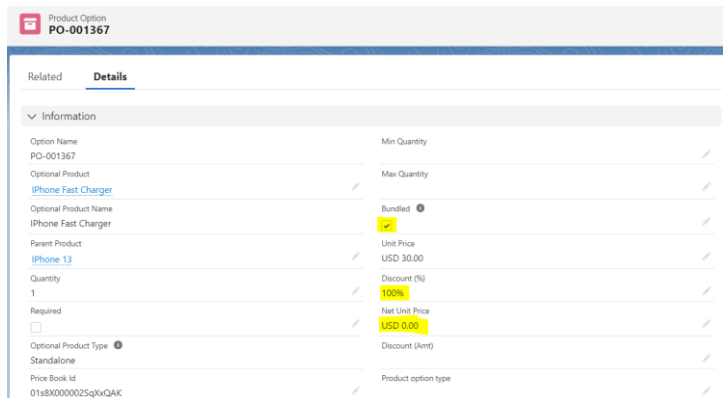
Upcoming & Overdue

Clicking on the Create/Edit Bundle button will open bundle configurator screen. Follow the exact steps as mentioned in the "bundle product configuration from list view". REF - [Bundle Configurator](#)

Product Option Configuration

A Product Option can be further configured using the following fields in the product option detail page.

Bundled – Indicates the product option is bundled with parent. Its price is included in the parent product. The Net Unit Price of the product is zero.



Product Option PO-001367	
Related Details	
Information	
Option Name PO-001367	Min Quantity
Optional Product iPhone Fast Charger	Max Quantity
Optional Product Name iPhone Fast Charger	Bundled ☒
Parent Product iPhone 13	Unit Price USD 30.00
Quantity 1	Discount (%) 100%
Required ☐	Net Unit Price USD 0.00
Optional Product Type Standalone	Discount (Amt)
Price Book Id 01s8x0000025q6uQAK	Product option type

Discount (%) - A percentage discount that applies to your configured SKU only when it's part of a bundle.

Max Quantity - The maximum quantity that this product is allowed within its parent bundle.

Min Quantity - The minimum quantity that this product is allowed within its parent bundle.

Required - Make this product required on the bundle.

Product Option Type -

- **Component:** Choose if this option, including quantity, is dependent on its parent, and that quantity should be multiplied by the quantity of the bundle.
- **Accessory:** Choose if this option is dependent on the parent, but the quantity is independent. For example, when a user enters a quantity for the product option, it will remain the same even if the quantity of the bundle changes.
- **Related Product:** Choose if this option is related, but fully independent products. Use this for cross-sell or upsell product options that users can add to the bundle yet control the quantity independently.

How to delete a product option from a product bundle?

1. Go to the product you want the product options to be deleted from.
2. Click on the "Create/Edit Bundle" button.


Product
iPhone 13

[Create/Edit Bundle](#)
[Submit for Approval](#)
[Delete](#)

Product Code

IPHONE13

Product Family

Hardware

Product Type

Bundle

Number of Options

7

Details

Related

Product Information

Product Name

iPhone 13

Product Family

Hardware

Status

Draft

Number of Options

7

Active

☒

Product Code

IPHONE13

Product Options

Product Currency

USD - U.S. Dollar

Related List Quick Links

[Price Books \(3\)](#)
[Product Option \(7\)](#)

[Subscriptions \(0\)](#)
[Block Prices \(0\)](#)

[Files \(0\)](#)

Filters: All time • All activities • All types

[Refresh](#)
[Expand All](#)
[View All](#)

Upcoming & Overdue

3. Select the Price book from which you need the product options to be deleted.
4. Click on "OK" to check if the product options you want to delete fall under the selected price book.

Create/Edit Bundle

Select Bundle

Configure Bundle

Select Bundle

Bundle

iPhone 13

* Related Price books

Americas

Ok

Previous

Next

5. Click on Next.

Create/Edit Bundle

Select Bundle

Bundle

iPhone 13

* Related Price books

Americas

Ok

Bundle Information

Name

iPhone 13

Family

Hardware

Product Code

IPHONE13

Active

☒

Pricing Information

Current Options

ProductName	Optional Product	Quantity	UnitPrice	Discount
PO-001218	Ridder Core ERP - Business Cloud Subscription	1	15	100
PO-001219	iPhone Activation	1	10	100
PO-001220	iPhone 13 Case	1	10	10
PO-001221	iPhone Fast Charger	1	30	
PO-001222	Apple Insurance	1	120	

Previous

Next

6. Select the options you want to delete. Here I need to delete all the product options. I will therefore select all.
7. Click on Delete Lines.

Create/Edit Bundle

☐	Laptop Bag 13inch	BAG13INCH	Consumable	Standalone	13inch Laptop Bag	30
☐	Lenovo Bluetooth headphones	HEADPHONESBT	Hardware	Standalone	Bluetooth Headphones by Lenovo	20
☐	Laptop Installation	INSTALLATION		Standalone	Laptop installation for Lenovo	20

[< Previous](#)
[Page 1 of 23](#)
[Next >](#)

[Select Products](#)

Current Options

☒	ProductName	Optional Product	Quantity	UnitPrice	Discount
☒	PO-001218	Ridder Core ERP - Business Cloud Subscription	1	15	100
☒	PO-001219	iPhone Activation	1	10	100
☒	PO-001220	iPhone 13 Case	1	10	10
☒	PO-001221	iPhone Fast Charger	1	30	
☒	PO-001222	Apple Insurance	1	120	

[Delete Lines](#)

8. Notice that the records are deleted.

Create/Edit Bundle

☐	Sony Headphones	SONYHP	Hardware	Standalone	Headphones by SONY - On ear with ...	50
☐	Monitor - 21 Inches	MONITOR21INCHS	Hardware	Standalone	Monitor 21 inches by Samsung	150
☐	Lenovo Bluetooth Mouse	BLUETOOTHMOUSE			Bluetooth mouse	10
☐	Laptop Bag 13inch	BAG13INCH			13inch Laptop Bag	30
☐	Lenovo Bluetooth headphones	HEADPHONESBT	Hardware	Standalone	Bluetooth Headphones by Lenovo	20
☐	Laptop Installation	INSTALLATION		Standalone	Laptop installation for Lenovo	20

[< Previous](#)
[Page 1 of 23](#)
[Next >](#)

[Select Products](#)

Current Options

☐	ProductName	Optional Product	Quantity	UnitPrice	Discount
--------------------------	-------------	------------------	----------	-----------	----------

[Delete Lines](#)

[Previous](#)
[Next](#)

PRICING CONFIGURATION

PRODUCT PRICING OVERVIEW

CPQ-Lite provides several pricing methods and discounts that sales reps can apply to their quote lines. There are several calculations that occur between the list price and Net price of a product.

PRODUCT PRICING STAGES

The pricing in CPQ-Lite follows the following order and affects the subsequent prices. Let's review what happens at each of the stages within this calculation.

PRICING STAGE	SOURCE
List Price	Initial Price as defined by the price book or Pricing Methodology
List Price – Pricing Adjustments	Price after a price override in product options (for Bundle Products) or price after any prorate multiplier is applied (for subscription products)
Discounted Price (System Generated)	Price after systemic discounts are applied. (Product Option discounts / Discount Schedules)
Discounted Price (Additional)	Price after additional discounts are applied. (Additional discount field)
Net Price	Price after all the discounts are applied. This is the final price of a product.

STAGE 1 – LIST PRICE

This is the Initial Price as defined by Price book or chosen pricing methodology. The list price is going to be determined largely by the pricing methods.

Pricing Method	List Price
List	Price book Entry
Block	Determined by Block price Tiers
Percent of Total	Calculated as defined by Percent of Total fields on the product record.

PRICING METHODS

CPQ-Lite offers three types of Pricing Methods which determine how the list price of the product is calculated.

1. **List** – Retrieved from Pricebook Entry.

List pricing is a straightforward pricing method that is based on a fixed price per unit. It is useful when you have a simple pricing model, and the prices for your products or services are not subject to frequent changes. With list pricing, you can set a single price for all customers or groups of customers.

2. **Block** – Calculated on a tiered basis.

Block pricing is a pricing method that is based on volume of product purchased. It allows you to set different prices based on the number of units purchased. For example, you can offer a lower price per unit for customers who buy larger quantities. With block pricing, you can define different price tiers, and each tier has a different price per unit.

3. **Percentage of Total** – Calculated as a percentage of other quote line items.

Calculates the price of a certain product based on a percent of the sum of other product prices. For example, the tip for a bill at a restaurant would be calculated in the same manner. It is usually a percentage (10-20%) of the total order.

4. **Product Option Pricing** - Option pricing allows admins to define an override price for a product when it's sold as part of a bundle, or in some cases make the option entirely free.

PRICING METHOD CONFIGURATION – LIST PRICE

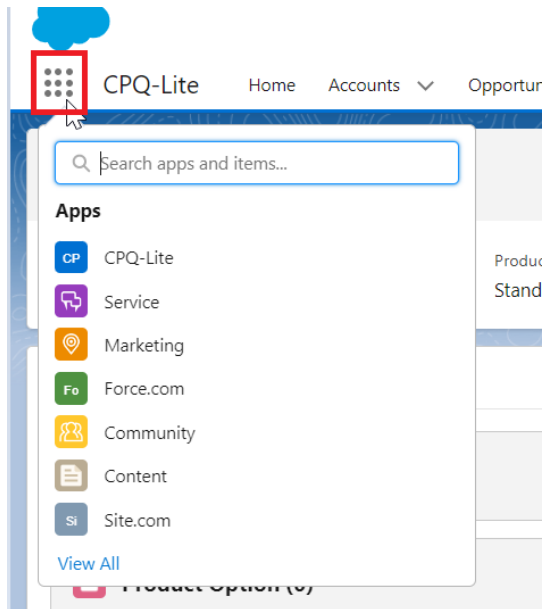
The list price is the quote line's initial price. When you quote a product, CPQ-Lite pulls the quote line's list price from the product's list price entry in your price book.

Price book – A Price book is a list of products and their prices.

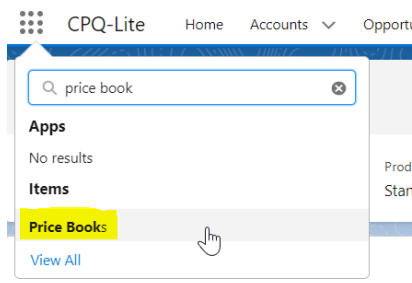
- The standard price book is the master list of all your products and their default standard prices. Salesforce creates the standard price book when you start creating product records. It includes all your products and their standard prices regardless of any custom price books that include those products.
- A custom price book is a separate list of products with custom prices, called list prices. Custom price books are ideal for offering products at different prices to different market segments, regions, or other subsets of your customers. Create a separate price book for each set of customers that you want to address. For example, if you have one set of prices for domestic customers and another for international customers, create a domestic price book and an international one.

CREATE A PRICE BOOK.

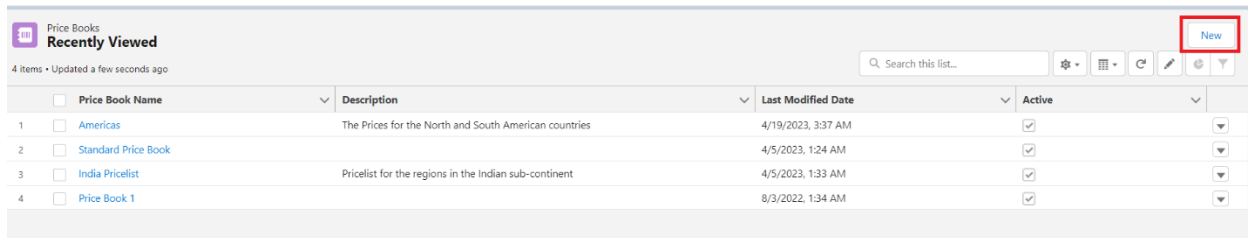
To create a Price book, click on the App Manager.



Search for Price book and select.



Click on the “New” button.



Enter the details and click on the Save button.

Check Is Standard Price Book if you want to make the price book default.

New Price Book

* Price Book Name

Description

Active
☒

Is Standard Price Book
☐

Cancel

Save & New

Save

This will create the Price Book.

ADD PRICE BOOK ENTRIES

To add price book entries, Navigate to Related tab in the Price Book.

In the Price Book Entries related list, click on the “Add Products” button.

CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules Americas

Price Book Americas

Edit Clone Delete

Related Details

Price Book Entries (6+)

Add Products

Product Name	Product Code	List Price	Active
Air Cooler	AIR13ACS3LER	USD 100.00	☒
Amana Brand	AMRUF486016	USD 100.00	☒
Apple Insurance	APPLEINSURANCE	USD 120.00	☒
Bajaj Geysers	BAJAJ093AC63	USD 100.00	☒
Bajaj Iron	BALAL5673AC6G	USD 100.00	☒

This will show the list of products which are currently not included in the price book.

Select the products which are to be part of the price book.

Add Products

Price Book: Americas

Show Selected (0)

☐	Product Name	Product Code	List Price	Product Description	Product Family
☐	AHU	ARPT42D14	USD 100.00		Consumable
☐	Air Conditioner	AIR32COOLER	USD 100.00		Consumable

Enter the List Price, Currency and activate the price book entry. This ensures that the selected product gets its price from the below entry.

Click Save.

Edit Selected Price Book Entries

*Product	Active	*List Price	Currency	Product Code
1 AHU	☒	100	USD - U.S. Dollar	ARPT42D14

[Back](#) [Cancel](#) [Save](#)

Alternatively, the list price can be added directly to the product from the product record.

ADDING LIST PRICE FROM THE PRODUCT

To add a list price to a product –

Go to Related Tab

Go to the Price books section and click on Add Standard Price as a standard price is mandatory for every product.

Product **Laser Printer** [Create/Edit Bundle](#) [Submit for Approval](#) [Delete](#)

Product Code	Product Family	Product Type	Number of Options
LASERPRINTER	Hardware	Standalone	

Details **Related**

[Price Books \(0\)](#) [Add Standard Price](#)

[Product Option \(0\)](#) [New](#)

[Subscriptions \(0\)](#) [New](#)

Related List Quick Links

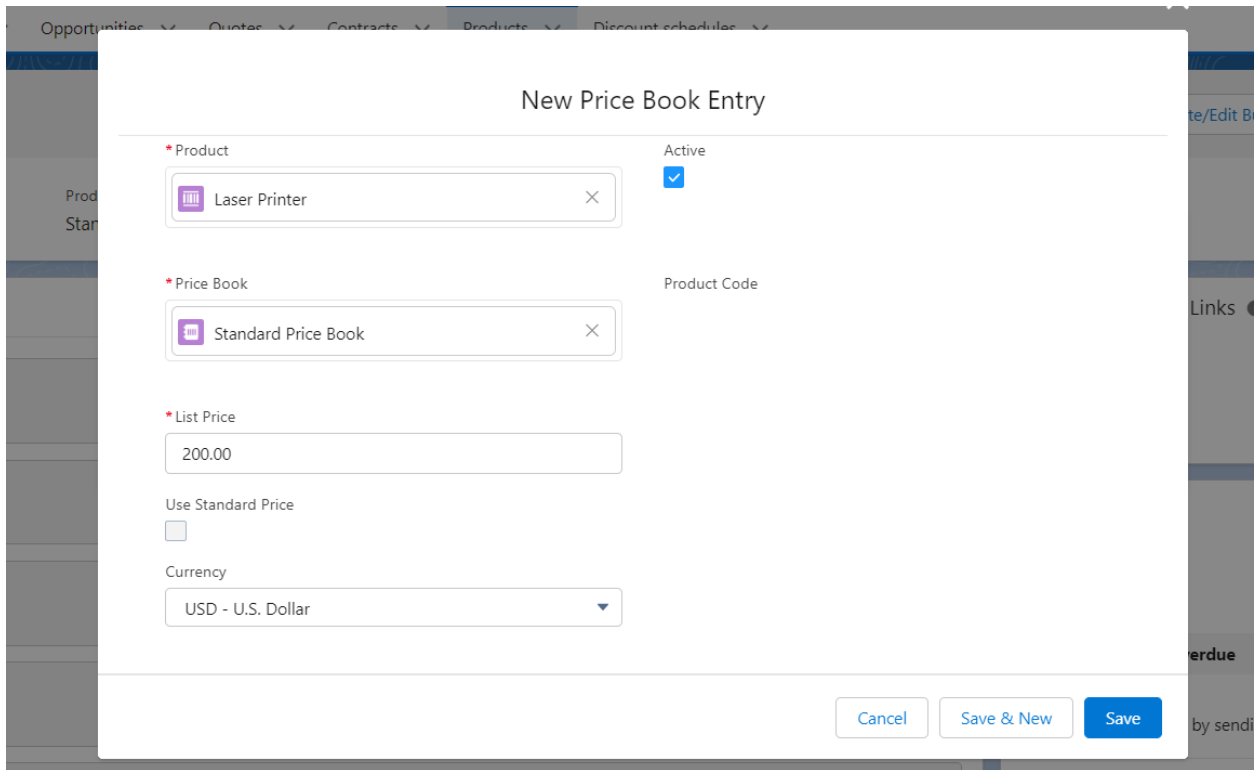
- [Price Books \(0\)](#)
- [Product Option \(0\)](#)
- [Subscriptions \(0\)](#)
- [Block Prices \(0\)](#)
- [Files \(0\)](#)

Filters: All time • All activities • All types [Refresh](#) [Expand All](#) [View All](#)

Uncommins & Overdue

Enter the list price for the product.

Choose Currency and click on the Save button.



New Price Book Entry

* Product: × Active: ☒

* Price Book: × Product Code:

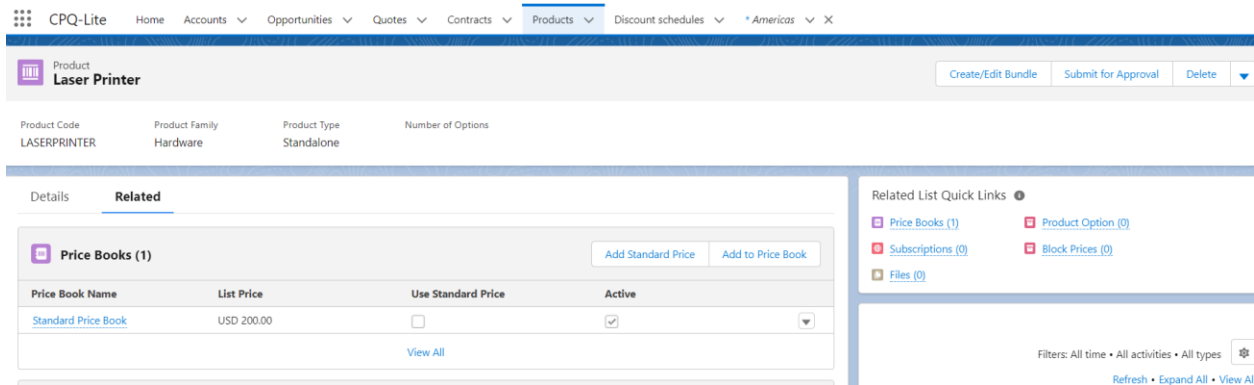
* List Price:

Use Standard Price: ☐

Currency: ▼

[Cancel](#) [Save & New](#) [Save](#)

This creates the price book entry for standard price book.



CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules Americas X

Product **Laser Printer** [Create/Edit Bundle](#) [Submit for Approval](#) [Delete](#) ▼

Product Code: LASERPRINTER Product Family: Hardware Product Type: Standalone Number of Options:

Details **Related**

Price Books (1) [Add Standard Price](#) [Add to Price Book](#)

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	USD 200.00	☐	☒

[View All](#)

Related List Quick Links

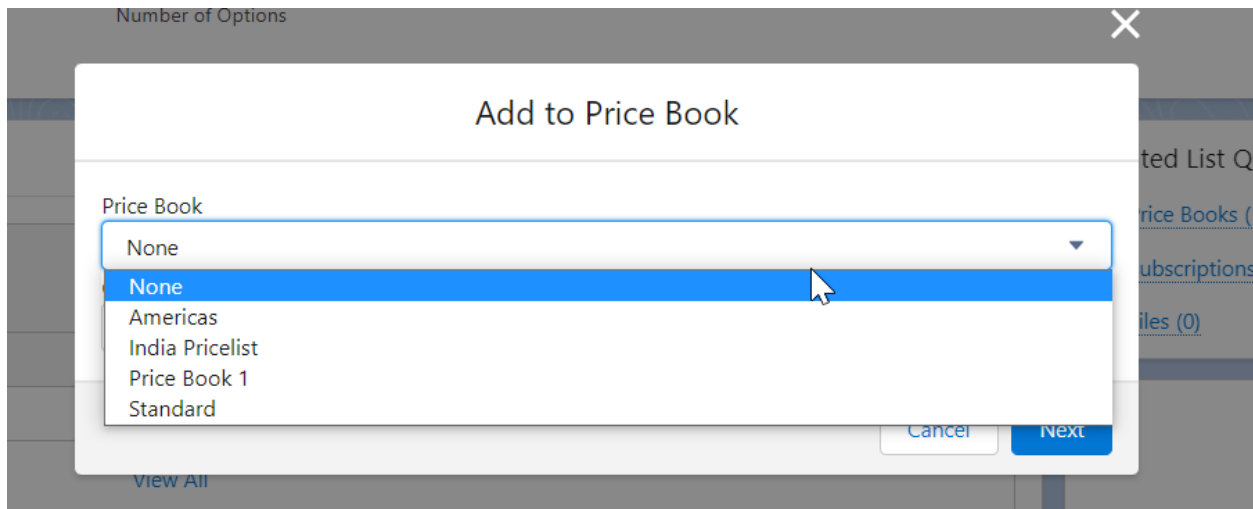
- [Price Books \(1\)](#)
- [Subscriptions \(0\)](#)
- [Files \(0\)](#)
- [Product Option \(0\)](#)
- [Block Prices \(0\)](#)

Filters: All time • All activities • All types [Refresh](#) [Expand All](#) [View All](#)

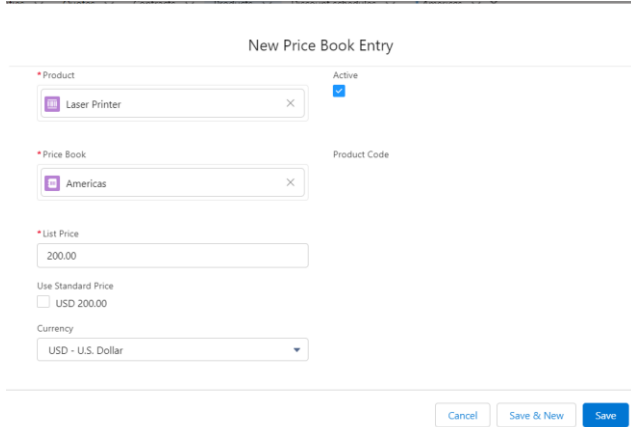
Click on “Add to Price Book” button and select any of the price books that you need the product to be part of.

Select the currency.

Click Next.



You can set a list price or you the standard price. Click Save to create the new list price.



You can repeat these steps for each price book that you want to add a list price to. Once you have created list prices for your products, you can use them to generate quotes and proposals for your customers.

SET LIST PRICING METHOD FOR A PRODUCT.

The pricing information for a product is stored in the pricing method field in a product record. To set a pricing method for a product,

- Navigate to Product detail page.
- Scroll down to the Pricing & Discounts section.

CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules

Product **iPhone 13**

Hardware	IPHONE 13
Status	Product Options
Draft	
Number of Options	Product Currency
4	USD - U.S. Dollar
Product Type	
Bundle	
Product Description	
Product Image	

▼ Pricing & Discounts

Pricing Method ⓘ	Percent Of Total(%) ⓘ
List	
Percent Of Total Category	Percent Of Total Base ⓘ
Discount schedule	Include in Percent of Total ⓘ

Select the Pricing Method.

Pricing & Discounts

Pricing Method ⓘ

List

--None--

✓ List

Block

Percent Of Total

Discount schedule Applied ☐

Percent Of Total(%) ⓘ

Percent Of Total Base ⓘ

--None--

Include in Percent of Total ⓘ ☐

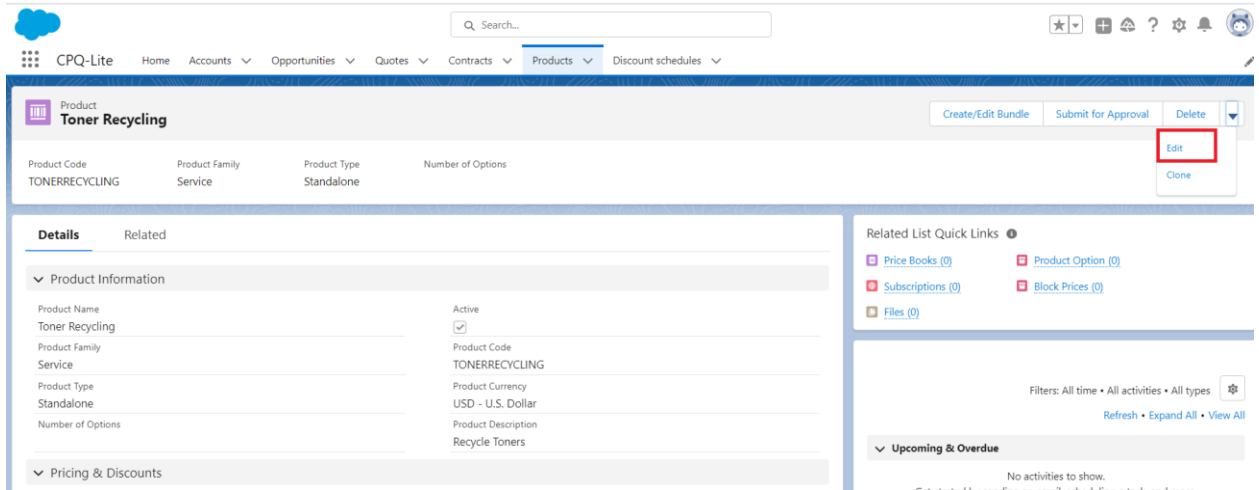
Exclude in Percent of Total ⓘ ☐

PRICING METHOD CONFIGURATION – BLOCK PRICE

Block pricing prices a product based on a predefined range/slab defined using lower bound and upper bound.

HOW TO CONFIGURE A PRODUCT TO HAVE BLOCK PRICING?

- Set pricing method = Block
- Create 'Block Price' records related to a product.
- Consideration while creating a block price record –
 - Lower bound is inclusive.
 - Upper bound is exclusive.
 - Lower bound of the current record must match the upper bound of the previous record



CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules

Product **Toner Recycling** Create/Edit Bundle Submit for Approval Delete **Edit** Clone

Product Code	Product Family	Product Type	Number of Options
TONERRECYCLING	Service	Standalone	

Details Related

Product Information

Product Name	Active
Toner Recycling	☒
Product Family	Product Code
Service	TONERRECYCLING
Product Type	Product Currency
Standalone	USD - U.S. Dollar
Number of Options	Product Description
	Recycle Toners

Pricing & Discounts

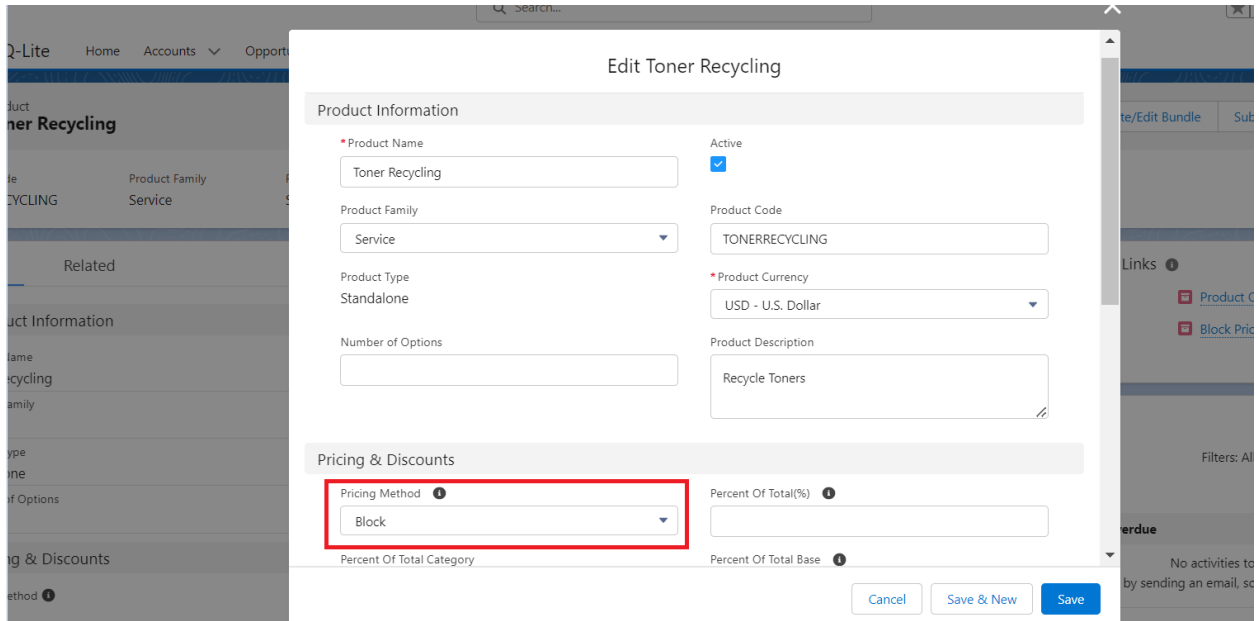
Related List Quick Links

- Price Books (0)
- Product Option (0)
- Subscriptions (0)
- Block Prices (0)
- Files (0)

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.



Edit Toner Recycling

Product Information

Product Name	Active
Toner Recycling	☒
Product Family	Product Code
Service	TONERRECYCLING
Product Type	Product Currency
Standalone	USD - U.S. Dollar
Number of Options	Product Description
	Recycle Toners

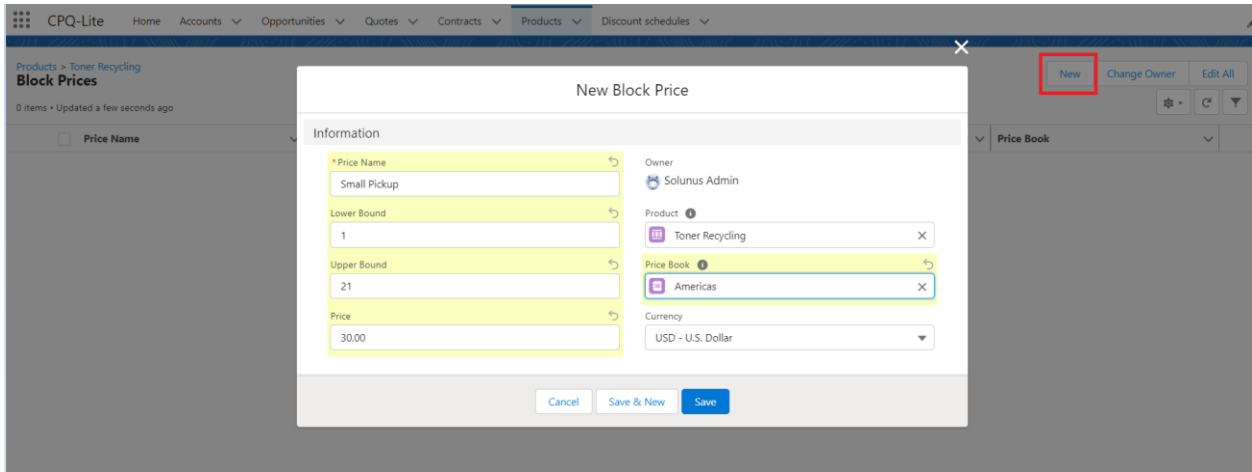
Pricing & Discounts

Pricing Method	Percent Of Total(%)
Block	
Percent Of Total Category	Percent Of Total Base

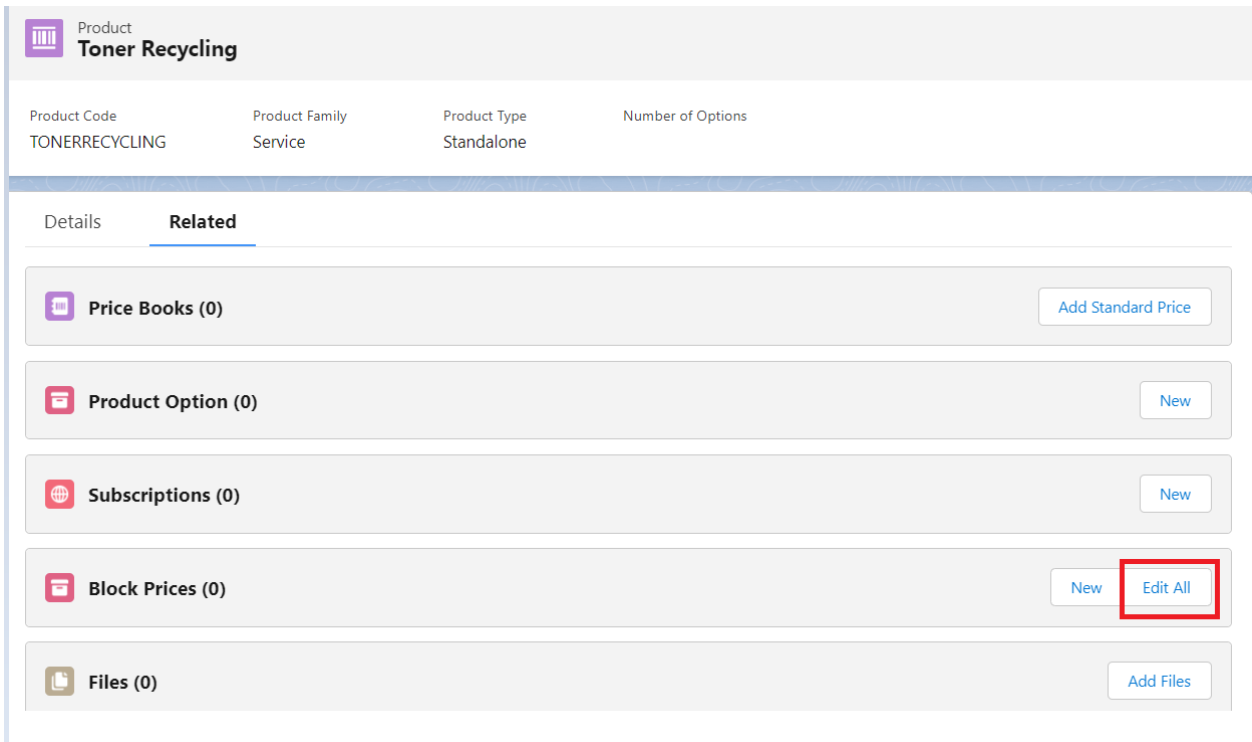
Cancel Save & New Save

While on the product record, click on the Related tab and in the Block Prices related list, click New.

Enter the tier information and click on save and new to enter the new tier.



Alternatively, if you want to enter all the tiers at a time, click on the “Edit All” button.



- Select the Price book, which you want the entries to be part of.
- Click on “+” icon to add more tiers.
- Click on the delete icon to remove the tiers.
- Use Clone From option to clone an existing block price record.
- Create the necessary tiers with the specified ranges and prices for your product. Indicate the name to identify the tier, the lower bound, the upper bound and the price for each range.
- Click the Save button.

Block Prices

Price book: Americas Clone From: Select an Option Clone +

Name	LowerBound	UpperBound	Price(\$)		
Small Pickup	1	21	30	+	✖
Medium Pickup	21	51	50	+	✖
Large Pickup	51	101	70	+	✖

Save Cancel

PRICING METHOD CONFIGURATION – PERCENTAGE OF TOTAL (%)

The percentage of total product's price is this percentage of the combined price of its covered products. If you are looking to have a product that has its price calculated by another product or set of products, you will want to set up a Percent of Total product. Doing this requires a couple of steps.

CPQ Lite uses this product's percent of total base to determine the price field (list or net) used in this calculation.

HOW TO CONFIGURE A PRODUCT TO HAVE A PERCENT OF TOTAL PRICING?

Configuration for One Time / Non-Subscription Product –

For a Non-subscription or One time product record to have a percent of total pricing,

First, on the product record that will be the percentage of total product, you will want to make sure the following fields are populated.

1. Pricing Method – Select “Percent of Total” Option
2. Percent Of Total (%) – This is the percent of the price that you want this product to be priced at
3. Percent Of Total Base – This is the value of the other products that you want to take the percentage value of. The options include List and Net.

Product **Apple Insurance**

hardware failures.

▼ Pricing & Discounts

Pricing Method ⓘ ← ①

Percent Of Total

Percent Of Total Category

Discount schedule

Discount schedule Applied

☐

Percent Of Total(%) ⓘ ← ②

10%

Percent Of Total Base ⓘ ← ③

List

Include in Percent of Total ⓘ

☐

Exclude in Percent of Total ⓘ

☐

▼ Subscription

Subscription Type ⓘ

Subscription Term ⓘ

Subscription Pricing ⓘ

▼ Renewal

RenewalProduct ⓘ

Configuration for Subscription Product –

1. Pricing Method – Select “List” Option as the Pricing Method.
2. Subscription Pricing – This should be populated only for a subscription product and should be set to Percent of Total.
3. Percent Of Total (%) – This is the percent of the price that you want this product to be priced at
4. Percent Of Total Base – This is the value of the other products that you want to take the percentage value of. The options include List and Net

▼ Pricing & Discounts

Pricing Method ⓘ ← ①

List

Percent Of Total Category

Discount schedule

Discount schedule Applied

☐

Percent Of Total(%) ⓘ ← ③

10%

Percent Of Total Base ⓘ ← ④

List

Include in Percent of Total ⓘ

☐

Exclude in Percent of Total ⓘ

☐

▼ Subscription

Subscription Type ⓘ

Renewable

Subscription Term ⓘ

12

Subscription Pricing ⓘ ← ②

Percent of total

▼ Renewal

RenewalProduct ⓘ

CALCULATIONS – HOW DOES A PRODUCT (ONE TIME/SUBSCRIPTION) GET ITS PERCENT OF TOTAL PRICING?

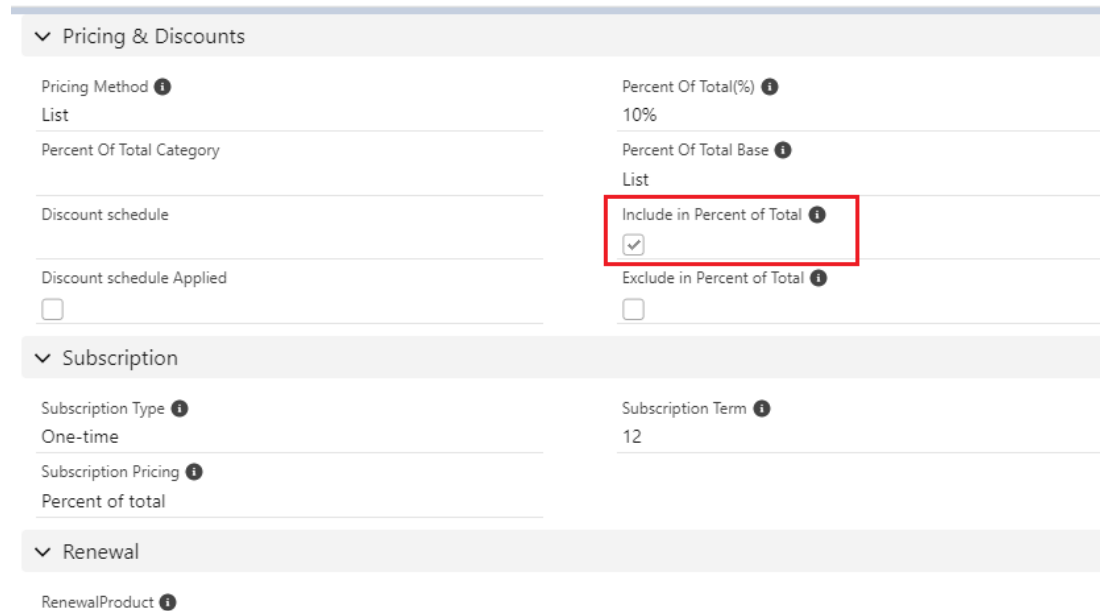
Once you have the Percent of Total Product setup, you will need to update the products from which the calculations will occur. These products are also called the contributing products. Below are the three fields to consider to setup a contributing product:

Include in Percent of Total -

By default, the system covers only the non-subscription (One time) products in the quote. It does not include Subscription products in the calculation, so you need to make sure that this is checked on any subscription product you want to include in the calculation.

For a subscription product to be included in the calculation –

Click on the “**Include in percent of total**” checkbox.



▼ Pricing & Discounts

Pricing Method ⓘ List	Percent Of Total(%) ⓘ 10%
Percent Of Total Category	Percent Of Total Base ⓘ List
Discount schedule	Include in Percent of Total ⓘ ☒
Discount schedule Applied ☐	Exclude in Percent of Total ⓘ ☐

▼ Subscription

Subscription Type ⓘ One-time	Subscription Term ⓘ 12
Subscription Pricing ⓘ Percent of total	

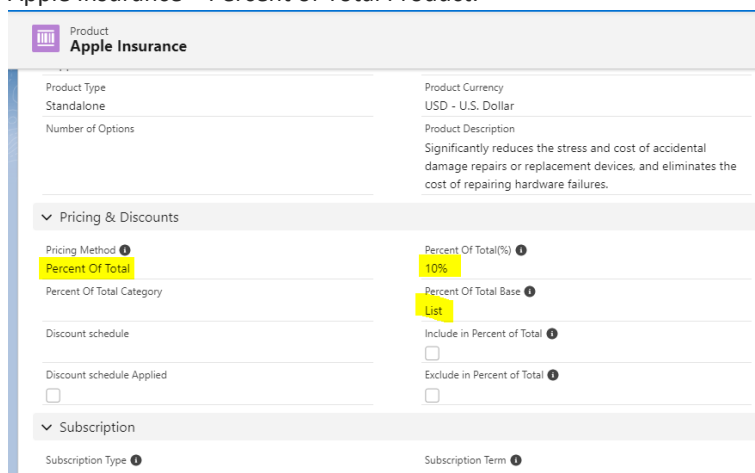
▼ Renewal

RenewalProduct ⓘ

How does this work?

Let us consider the following three products –

1. Apple Insurance – Percent of Total Product.



Product
Apple Insurance

Product Type Standalone	Product Currency USD - U.S. Dollar
Number of Options	Product Description Significantly reduces the stress and cost of accidental damage repairs or replacement devices, and eliminates the cost of repairing hardware failures.

▼ Pricing & Discounts

Pricing Method ⓘ Percent Of Total	Percent Of Total(%) ⓘ 10%
Percent Of Total Category	Percent Of Total Base ⓘ List
Discount schedule	Include in Percent of Total ⓘ ☐
Discount schedule Applied ☐	Exclude in Percent of Total ⓘ ☐

▼ Subscription

Subscription Type ⓘ	Subscription Term ⓘ
---------------------	---------------------

2. Project Management Tool – Subscription Product

Product
Project Management Tool License

Pricing Method ❶	Percent Of Total(%) ❶
List	
Percent Of Total Category	Percent Of Total Base ❶
Discount schedule	Include in Percent of Total ❶
Discount schedule Applied	☐
☐	Exclude in Percent of Total ❶
☐	☐

▼ **Subscription**

Subscription Type ❶	Subscription Term ❶
	12
Subscription Pricing ❶	
Fixed Price	

▼ **Renewal**

RenewalProduct ❶	
------------------	--

3. iPhone 14 Pro – One Time Product / Non-Subscription Product.

Product
iPhone 14 Pro

▼ **Product Information**

Product Name	Active
iPhone 14 Pro	☒
Product Family	Product Code
Hardware	IPHONE14PRO
Product Type	Product Currency
Standalone	USD - U.S. Dollar
Number of Options	Product Description

▼ **Pricing & Discounts**

Pricing Method ❶	Percent Of Total(%) ❶
List	
Percent Of Total Category	Percent Of Total Base ❶
Discount schedule	Include in Percent of Total ❶
Discount schedule Applied	☐
	Exclude in Percent of Total ❶

Since “Apple insurance” is the Percent of Total product, it should get its value as a percentage of the total of the other two products. i.e., Project Management Tool and Iphone 14 Pro. However, we know that by default Apple insurance should only consider Iphone 14 Pro as this is a One Time Product. PM Tool should only be considered if it is included in Percent of Total check box checked.

Scenario 1 – Subscription product does not have Percent of Total check box checked.

Product
Project Management Tool License

▼ Pricing & Discounts

Pricing Method ⓘ

List

Percent Of Total Category

Discount schedule

Discount schedule Applied

☐

Percent Of Total(%) ⓘ

Percent Of Total Base ⓘ

Include in Percent of Total ⓘ

☒

Exclude in Percent of Total ⓘ

☐

▼ Subscription

Subscription Type ⓘ

Subscription Term ⓘ

12

Subscription Pricing ⓘ

Fixed Price

▼ Renewal

RenewalProduct ⓘ

Edit Quote Lines

Product Selection

Delete Lines

Calculate

Save

Quote Information

Start Date End Date Subscription term

Additional Discount

☐	Product Name	Product Code	Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discou...	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Apple Insurance	APPLEINSURANCE	1	110	110	0	110	110	110
☐	iPhone 14 Pro	IPHONE14PRO	1	1100	1,100	0	1,100	1,100	1,100
☐	 Project Management Tool License	PMTOOLLICENSE	1	22	22	0	22	22	22

Scenario 2 – Subscription product has Percent of Total check box checked.


Product
Project Management Tool License

▼ Pricing & Discounts

Pricing Method ⓘ
List

Percent Of Total Category

Discount schedule

Discount schedule Applied
☐

Percent Of Total(%) ⓘ

Percent Of Total Base ⓘ

Include in Percent of Total ⓘ
☒

Exclude in Percent of Total ⓘ
☐

▼ Subscription

Subscription Type ⓘ

Subscription Pricing ⓘ
Fixed Price

Subscription Term ⓘ
12

▼ Renewal

RenewalProduct ⓘ

Considers PM Tool License

Edit Quote Lines

Product Selection
Delete Lines
Calculate
Save

Quote Information

Start Date
Apr 30, 2023

End Date
enter End Date

Subscription term
12

Additional Discount
Enter Discount

☐	Product Name	Product Code	*Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discou...	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Apple Insurance	APPLEINSURANCE	1	112.2	112.2	0	112.2	112.2	112.2
☐	Project Management Tool License	PMTOOLLICENSE	1	22	22	0	22	22	22
☐	iPhone 14 Pro	IPHONE14PRO	1	1100	1,100	0	1,100	1,100	1,100

Exclude from percent of total –

By default, non-Subscription products will be considered for Percent of Total. To exclude any product from the percentage of total calculation check the Exclude from Percent of Total checkbox.

Scenario - iPhone 14 Pro has Exclude Percent of Total Checkbox.


Product
iPhone 14 Pro

Product Family	Hardware	Product Code	IPHONE14PRO
Product Type	Standalone	Product Currency	USD - U.S. Dollar
Number of Options		Product Description	

▼ Pricing & Discounts

Pricing Method ⓘ	Percent Of Total(%) ⓘ
List	
Percent Of Total Category	Percent Of Total Base ⓘ
Discount schedule	Include in Percent of Total ⓘ
Discount schedule Applied	☐
	Exclude in Percent of Total ⓘ
	☒

▼ Subscription

Subscription Type ⓘ	Subscription Term ⓘ

Since, there are no products from which Apple Insurance can get its POT pricing from, the unit price becomes 0.

Edit Quote Lines


Quote Information

Start Date

 End Date

 Subscription term

Additional Discount

Product Selection
 Delete Lines
 Calculate
 Save

☐	Product Name	Product Code	*Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discou...	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Apple Insurance	APPLEINSURANCE	1	0	0	0	0	0	0
☐	Project Management Tool License	PMTOOLLICENSE	1	22	22	0	22	22	22
☐	iPhone 14 Pro	IPHONE14PRO	1	1100	1,100	0	1,100	1,100	1,100

Percent of total category – if this is set as hardware. It should be checked for all products (in the quote) which have a similar percentage of total category.

i.e.

Product A – percent of total category – hardware, Pricing Method - % of total (10)

Product B – percent of total category – hardware, \$100

Product C – percent of total category – software, \$300

Price of Product A will be 10% of Product B = 10% of 100 = 10

**Percent of total category is not same as product family. Product C could have product family set as hardware, but if the category is not set as hardware, it won't be considered.*

STAGE 2 – PRICING ADJUSTMENTS (IN LIST PRICE)

In addition to the Pricing methods, List price also considers pricing adjustments (if any). Pricing adjustments are any special Prices which are added to a product.

- **Product Option Price Override** – Allows admins to define an override price for a product when it's sold as part of a bundle, or in some cases make the product option entirely free.
- **Subscription Pricing** – This is the price that is obtained after a prorate multiplier is applied. This proration is only applicable for subscription products based on the subscription term of the product / quote line.

PRODUCT OPTION PRICE OVERRIDE

If a product is under a specific bundle, the sales reps can override the price of the product (Optional product). By default, the price for the product option comes from the price book entry.

For example, if you consider adding an iPhone Fast Charger as an option to a bundle; initially, the unit price will be same as the list price. However, this can be overridden, and a custom price can be added. Going forward, the product option will be getting the new custom price, wherever the bundle is added.

The Product Option Pricing can be overridden in two ways –

Method 1: In the Bundle Configurator.

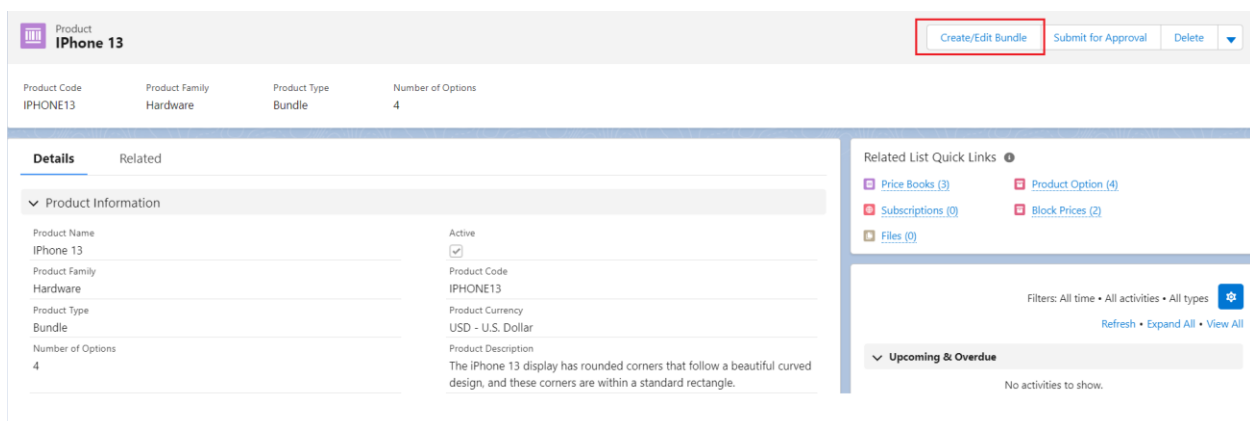
Method 2: In the Product Option detail page.

Product Option Price Override – In Bundle Configurator

This can be done while adding product options to a bundle. Below are the steps to follow -

1. Navigate to the bundle configurator –

Go to the product you want to create a bundle for and then click on the **“Create/Edit Bundle”** button.



Product **iPhone 13**

Create/Edit Bundle Submit for Approval Delete

Product Code	Product Family	Product Type	Number of Options
IPHONE13	Hardware	Bundle	4

Details Related

Product Information

Product Name: iPhone 13

Product Family: Hardware

Product Type: Bundle

Number of Options: 4

Active: ☒

Product Code: IPHONE13

Product Currency: USD - U.S. Dollar

Product Description: The iPhone 13 display has rounded corners that follow a beautiful curved design, and these corners are within a standard rectangle.

Related List Quick Links

- Price Books (3)
- Product Option (4)
- Subscriptions (0)
- Block Prices (2)
- Files (0)

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

2. Select the related price book and click on Next.
3. When in a bundle configurator, select products and add them to cart.

- After the selection of products - edit the Unit Price field on the product option you want to override the price for.

In the below screenshot, iPhone Fast Charger has a list price of USD30. The pricing has been overridden to USD20 as seen in the next screenshot.

To know how to create a product bundle refer **BUNDLE PRODUCT CREATION** in [PRODUCT CONFIGURATION MANUAL](#).

Create/Edit Bundle

☐ Laptop Installation
INSTALLATION
Standalone
Laptop installation for Lenovo
20

< Previous
Page 1 of 25
Next >

Select Products

S.No	Product Name	Quantity*	List Price	Unit Price	Discount %	Net Unit Price	Net Sale Price	Total Price
1.	iPhone Fast Charger		30	30				

Save & Close
Save
Clear All

Create/Edit Bundle

Select Products

S.No	Product Name	Quantity*	List Price	Unit Price	Discount %	Net Unit Price	Net Sale Price	Total Price
1.	iPhone Fast Charger	1	30	20		20	20	20

Save & Close
Save
Clear All

* Sorry, there are no product options available for the selected pricebook at this time.

Previous
Next

Product Option Price Override – Product Option Detail Page

To override a product option from the Product Option Detail Page –

- Navigate to the parent product by going to the Products object tab.
- When in the parent product detail page, Click on the product options related list link present on the Related List Quick Links section in the extreme right side of the page.
Alternatively, you can choose to go to the Related Tab and then scroll down to the Product Option section.

CPQ-Lite Home Accounts Opportunities Quotes Contracts **Products** Discount schedules

Product **iPhone 13** Create/Edit Bundle Submit for Approval Delete

Product Code: IPHONE13 Product Family: Hardware Product Type: Bundle Number of Options: 4

Details Related

Product Information

Product Name: iPhone 13 Active: ☒
 Product Family: Hardware Product Code: IPHONE13
 Product Type: Bundle Product Currency: USD - U.S. Dollar
 Number of Options: 4 Product Description: The iPhone 13 display has rounded corners that follow a beautiful curved design, and these corners are within a standard rectangle.

Pricing & Discounts

Related List Quick Links

- Price Books (3)
- Subscriptions (0)
- Files (0)
- Product Option (4)**
- Block Prices (2)

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

3. Select the required Product Option.

Products > iPhone 13
Product Option

4 items • Sorted by Product option type • Updated a few seconds ago

	Option Name	Optional Product	Discount (%)	Unit Price	Optional Product Type	Pricebook Name	Product option type
1	PO-001376	Lightning Charge Cable 1m		USD 20.00	Standalone	Americas	
2	PO-001977	iPhone Fast Charger	0%	USD 30.00	Standalone	Americas	
3	PO-001372	iPhone 13 Case		USD 10.00	Bundle	Americas	Accessory
4	PO-001369	Apple Insurance		USD 150.00	Standalone	Americas	Related Product

4. Edit the unit price of the option – by clicking on the Edit button or the pencil icon at the end of the field.

Product Option **PO-001977** Edit Delete Clone Change Owner Printable View

Details Activity

Information

Option Name	PO-001977	Min Quantity	
Optional Product	iPhone Fast Charger	Max Quantity	
Optional Product Name	iPhone Fast Charger	Bundled	☐
Parent Product	iPhone 13	Unit Price	USD 30.00
Quantity	1	Discount (%)	0%
Required	☐	Net Unit Price	USD 30.00
Optional Product Type	Standalone	Discount (Amt)	

SUBSCRIPTION PRICE PRORATION

This is the price that is obtained after a prorate multiplier is applied. This proration is only applicable for subscription products based on the subscription term of the product / quote line.

To understand what subscription products are and how they are configured, Please refer to the [SUBSCRIPTION PRODUCT CONFIGURATION](#)

Let's take an example. Suppose we have a subscription product with the Subscription Pricing set to Fixed Price, the Pricing Method set to List, a Subscription Term of 12 and a price book entry of USD50. The Subscription Prorate Precision is monthly, and the Subscription Term Unit is set to 12.


Product Maintenance Service

Product Code	Product Family	Product Type	Number of Options
MAINTENANCE	Service	Standalone	

Details

Product Information

Product Name

Maintenance Service

Product Family

Service

Product Type

Standalone

Number of Options

Active

☒

Product Code

MAINTENANCE

Product Currency

USD - U.S. Dollar

Product Description

PM Tool Maintenance Service

Pricing & Discounts

Subscription

Subscription Type

One-time

Subscription Pricing

Fixed Price

Subscription Term

12

[Products > Maintenance Service](#)
Price Books

2 items • Sorted by Is Standard Price Book, Product Name, Currency ISO Code • Updated a few seconds ago

The Start Date of the quote is June 1, 2023, and the Subscription term on the quote is 21 months. The prorate multiplier is going to be 21 (subscription term in months) / 12 (product's subscription term) = 1.75

Hence the prorated list price is $\text{USD}50 * 1.75 = \text{USD}87.50$

Observe the below screenshots for reference – 1st screenshot shows the quote for 12 months and the 2nd one shows the prorated price for 21 months.

Quote Information

Start Date: Jun 1, 2023 End Date: Dec 1, 2023 Subscription term: 12

Additional Discount: Enter Discount

☐	Product Name	Product Code	*Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discount %	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Maintenance Service	MAINTENANCE	1	50	50	0	50	50	50

Quote Information

Start Date: Jun 1, 2023 End Date: Dec 1, 2023 Subscription term: 21

Additional Discount: 0

☐	Product Name	Product Code	*Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discount %	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Maintenance Service	MAINTENANCE	1	87.5	87.5	0	87.5	87.5	87.5

STAGE 3 – DISCOUNTED PRICE (SYSTEM GENERATED)

These discounts are applied to the list price automatically by the system. The system discounts are applied on top of List price – pricing adjustments.

- **Product Option Discount** – These are the discounts given in the product option record.
- **Discount Schedule** – These are the volume-based discounts applied to the quote line. The discount schedules are based on quantity.

PRODUCT OPTION DISCOUNT

Product Option Discounting is an easy way to automatically discount products sold as part of a bundle.

You can apply discounts to product options to provide customers with flexible pricing options.

HOW TO CONFIGURE PRODUCT OPTION DISCOUNTS?

The Product Option Discounts can be **configured in two ways** –

Method 1: In the Bundle Configurator.

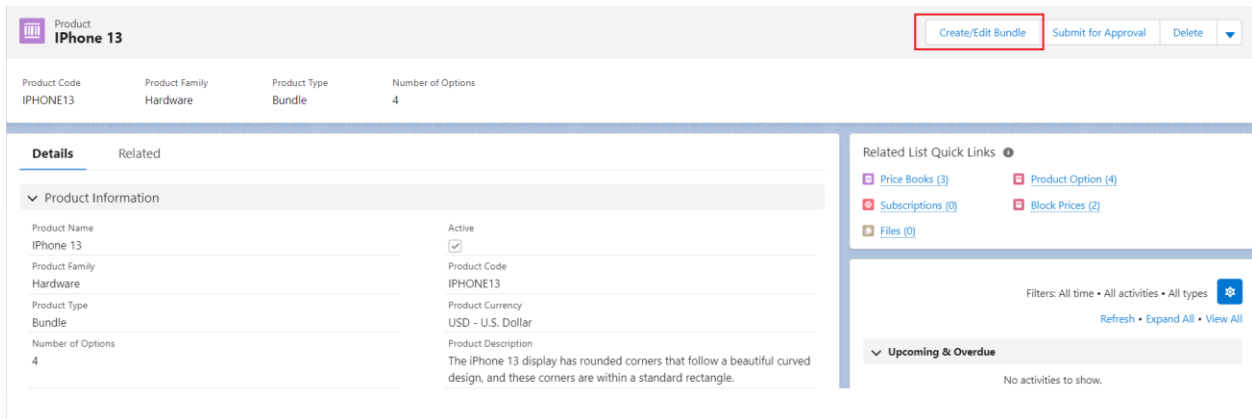
Method 2: In the Product Option detail page.

Product Option Discounting: In the Bundle Configurator

Below are the steps to apply a discount to a product option from the bundle configurator.

1. Navigate to the bundle configurator –

Go to the product you want to create a bundle for and then click on the **“Create/Edit Bundle”** button.



Product **iPhone 13**

Product Code: IPHONE13 | Product Family: Hardware | Product Type: Bundle | Number of Options: 4

Buttons: **Create/Edit Bundle** (highlighted), Submit for Approval, Delete

Details | Related

Product Information

Product Name: iPhone 13	Active: ☒
Product Family: Hardware	Product Code: IPHONE13
Product Type: Bundle	Product Currency: USD - U.S. Dollar
Number of Options: 4	Product Description: The iPhone 13 display has rounded corners that follow a beautiful curved design, and these corners are within a standard rectangle.

Related List Quick Links

- Price Books (3)
- Product Option (4)
- Subscriptions (0)
- Block Prices (2)
- Files (0)

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

2. Select the related price book and click on Next.
3. When in a bundle configurator, select products and add them to cart.
4. After selection of products - edit the value in the Discount (%) field on the product option you want to add the discount for. Hit Save. Notice that the net unit price has a discounted price.

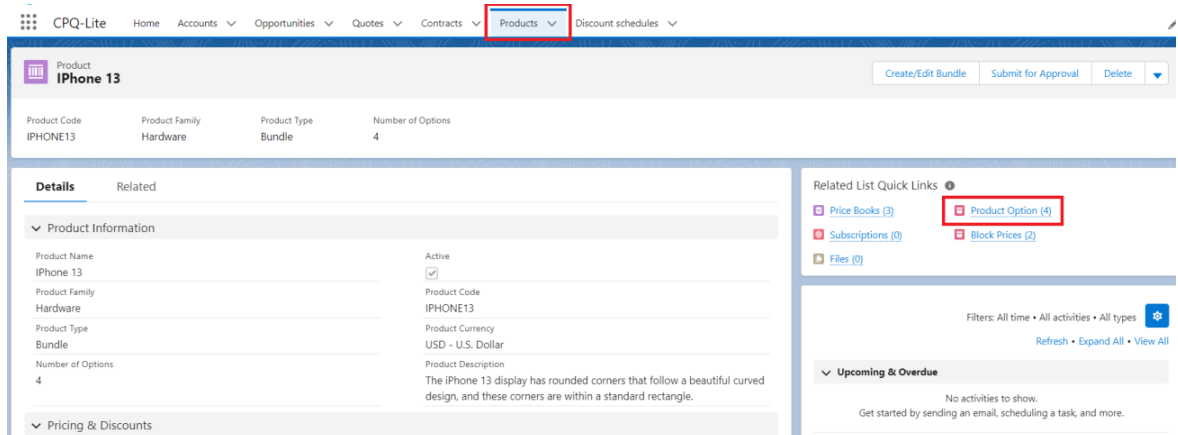
S.No	Product Name	Quantity*	List Price	Unit Price	Discount %	Net Unit Price	Net Sale Price	Total Price
1.	iPhone Fast Charger	1	30	30	10	27	27	27

Buttons: Save & Close, Save, Clear All

PRODUCT OPTION DISCOUNTING: IN THE PRODUCT OPTION DETAIL PAGE

Here are the steps to apply a discount to a product option in the Product Option detail page:

1. Navigate to the product detail page for the product that you want to update.



CPQ-Lite | Home | Accounts | Opportunities | Quotes | Contracts | **Products** | Discount schedules

Product **iPhone 13**

Product Code: IPHONE13 | Product Family: Hardware | Product Type: Bundle | Number of Options: 4

Buttons: Create/Edit Bundle, Submit for Approval, Delete

Details | Related

Product Information

Product Name: iPhone 13	Active: ☒
Product Family: Hardware	Product Code: IPHONE13
Product Type: Bundle	Product Currency: USD - U.S. Dollar
Number of Options: 4	Product Description: The iPhone 13 display has rounded corners that follow a beautiful curved design, and these corners are within a standard rectangle.

Related List Quick Links

- Price Books (3)
- Product Option (4)** (highlighted)
- Subscriptions (0)
- Block Prices (2)
- Files (0)

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

2. Select the product option that you want to apply a discount to

Products > iPhone 13
Product Option

4 items • Sorted by Product option type • Updated a few seconds ago

	Option Name	Optional Product	Discount (%)	Unit Price	Optional Product Type	Pricebook Name	Product option type
1	PO-001376	Lightning Charge Cable 1m		USD 20.00	Standalone	Americas	
2	PO-001977	iPhone Fast Charger	0%	USD 30.00	Standalone	Americas	
3	PO-001372	iPhone 13 Case		USD 10.00	Bundle	Americas	Accessory
4	PO-001369	Apple Insurance		USD 150.00	Standalone	Americas	Related Product

- Edit the **“Discount (%)”** field of the option – by clicking on the Edit button or the pencil icon at the end of the field. The discount would be calculated and displayed in the Net Unit Price field.

Product Option
iPhone Fast Charger

Edit Delete Clone

Information

Option Name PO-001977	Min Quantity
Optional Product iPhone Fast Charger	Max Quantity
Optional Product Name iPhone Fast Charger	Bundled ¹
Parent Product iPhone 13	Unit Price USD 30.00
Quantity 1	Discount (%) 10%
Required ☐	Net Unit Price USD 27.00
Optional Product Type ¹ Standalone	Discount (Amt)
Price Book Id 01s8X000002SqXxQAK	Product option type ¹
Pricebook Name	Currency

DISCOUNT SCHEDULES

Discount Schedules enable companies to offer **volume (Quantity)-based discounts** to customers who purchase large quantities of goods, encouraging larger sales volumes. By automating the application of these discounts through CPQ Lite, sales representatives no longer need to rely on outdated pricing data in Excel sheets or tables. This feature provides a more efficient and accurate discounting process, enabling companies to provide competitive pricing options to their customers while maintaining profitability.

Currently CPQ Lite supports Range based discount, which is applied to all the units based on the correct tier.

How does Discount Schedule work?

A reusable discount schedule is created in the system. Next, discount tiers are created which define a specific level or range of discount rates that are applied based on the quantity or volume of a product being purchased.

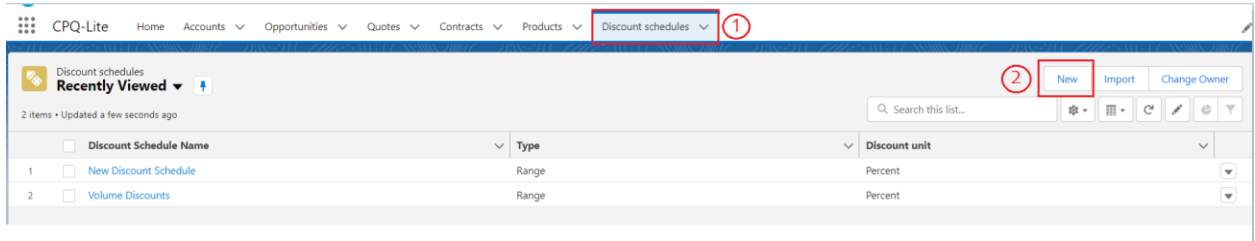
For example, a company might offer a 10% discount on a product if a customer purchases between 1-10 units, a 20% discount on the same product if a customer purchases between 11-50 units, and a 30% discount if a customer purchases more than 50 units.

When a customer purchases a certain volume of a product, the system checks if the product has a discount schedule assigned to it, if it does, then it further checks the quantity of the product ordered. Based on the quantity of the product, the system matches the quantity to the tier and assigns the predefined discount to the product.

HOW TO CONFIGURE DISCOUNT SCHEDULES?

To create a new discount schedule –

1. Navigate to the Discount Schedules Tab.
2. Click on New



3. Enter the Discount Schedule Name, Type = Range, Discount Unit = Percent and hit Save.

New Discount schedule

Information

* Discount Schedule Name

Volume Discounts

Type

Range

Discount unit

Percent

Owner

Solunus Admin

Currency

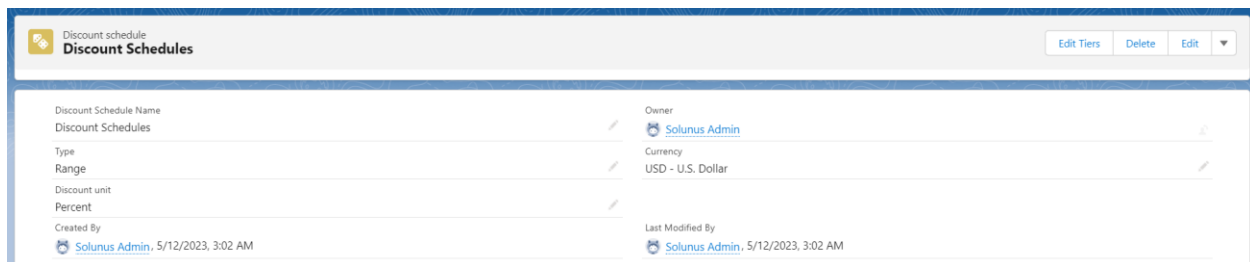
USD - U.S. Dollar

Cancel

Save & New

Save

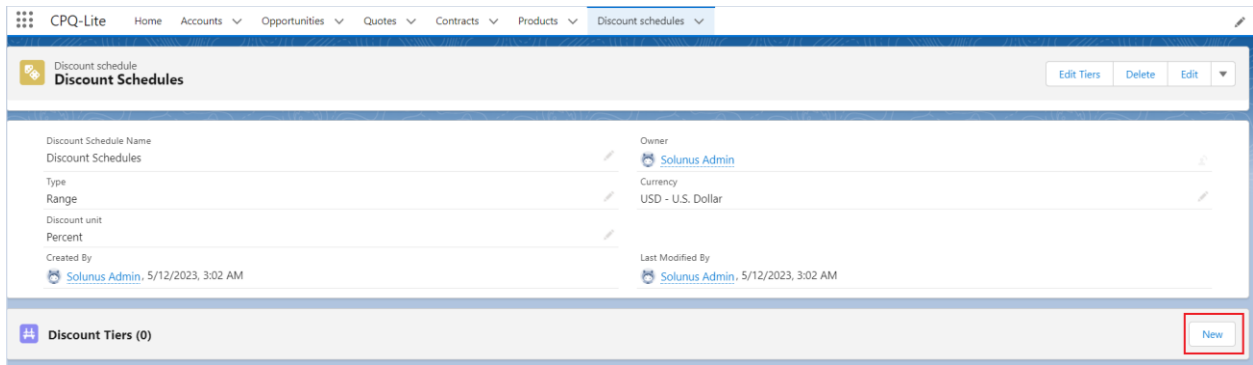
A new discount schedule has been created.



Now, let's create Discount Tiers for the schedule. The tiers can be created one at a time or multiple tiers at a time.

To create a single discount tier record-

Next click on "New" in the Discount Tiers related list to create Discount Tiers.



CPQ-Lite Home Accounts Opportunities Quotes Contracts Products Discount schedules

Discount schedule Discount Schedules Edit Tiers Delete Edit

Discount Schedule Name Discount Schedules Owner Solutus Admin

Type Range Currency USD - U.S. Dollar

Discount unit Percent

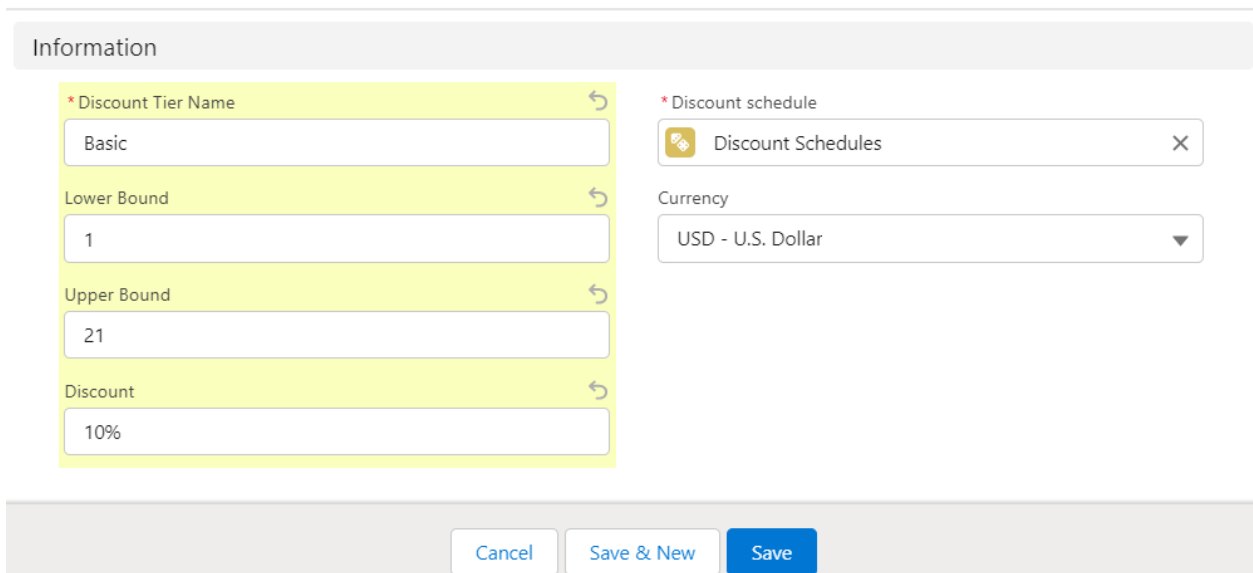
Created By Solutus Admin, 5/12/2023, 3:02 AM Last Modified By Solutus Admin, 5/12/2023, 3:02 AM

Discount Tiers (0) New

This will enable you to create a single discount tier record which is a single discount level for your discount schedule.

The Lower Bound value is the smallest value needed for the discount. The Upper Bound value is the highest value needed for the discount. However, the Upper Bound value isn't inclusive. Make sure that your upper bound is one digit higher than the value you want to include. For example, if you want your tier to include values 1 through 20, set your Upper Bound value to 21.

New Discount Tier



Information

* Discount Tier Name Basic

Lower Bound 1

Upper Bound 21

Discount 10%

* Discount schedule Discount Schedules

Currency USD - U.S. Dollar

Cancel Save & New Save

On hitting the Save button a single discount tier record is created.



Discount Tiers (1) New

Discount Tier Name	Lower Bound	Upper Bound	Discount
Basic	1	21	10%

Create multiple discount tiers at a time.

If you want to create multiple discount tiers at a time, click on the “Edit Tiers” button.

Discount schedule
Discount Schedules

[Edit Tiers](#) [Delete](#) [Edit](#)

Discount Schedule Name
Discount Schedules

Type
Range

Discount unit
Percent

Created By
Solunus Admin, 5/12/2023, 3:02 AM

Owner
Solunus Admin

Currency
USD - U.S. Dollar

Last Modified By
Solunus Admin, 5/12/2023, 3:02 AM

Discount Tiers (1) [New](#)

Discount Tier Name	Lower Bound	Upper Bound	Discount
Basic	1	21	10%

A screen should pop up like below.

Owner
Solunus Admin

Create Tiers [Clear All](#)

Name	LowerBound	UpperBound	Discount
Basic	1	21	10

[Save](#)

Click On **+** (Plus icon) and add the tier information. Hit Save to save the records.

Create Tiers [Clear All](#)

Name	LowerBound	UpperBound	Discount
Basic	1	21	10
Intermediate	21	41	20
Advanced	41	51	30

[Save](#)

Multiple discount tires would be created.

Discount schedule
Discount Schedules

Edit Tiers Delete Edit

Discount Schedule Name
Discount Schedules

Owner
Solunus Admin

Type
Range

Currency
USD - U.S. Dollar

Discount unit
Percent

Created By
Solunus Admin, 5/12/2023, 3:02 AM

Last Modified By
Solunus Admin, 5/12/2023, 3:02 AM

Discount Tiers (3) New

Discount Tier Name	Lower Bound	Upper Bound	Discount
Basic	1	21	10%
Intermediate	21	41	20%
Advanced	41	51	30%

APPLICATION OF DISCOUNT SCHEDULES

Discount Schedules can be applied to the products. When a Discount Schedule is applied to a product, the corresponding discount is automatically applied to the product's price when a quote or order is created.

How to apply a Discount Schedule to a Product?

To apply a discount schedule to a product,

1. Navigate to a product to which you need to apply the discount schedule.
2. Click on Edit
3. Scroll down to the "Pricing & Discounts" section.

Product Type
Standalone

Product Currency
USD - U.S. Dollar

Number of Options

Product Description

Pricing & Discounts

Pricing Method
List

Percent Of Total Category
Hardware

Discount schedule
Search Discount schedules...

Discount schedule Applied
☐

Percent Of Total(%)

Percent Of Total Base
--None--

Include in Percent of Total
☐

Exclude in Percent of Total
☐

Cancel Save & New Save

4. Search for the Discount Schedule. Select and save.

Pricing & Discounts

*Pricing Method ⓘ

List ▼

Percent Of Total Category

Hardware ▼

Discount schedule

Volume Discounts

×

ⓘ To remove the selected record, press Backspace or Del.

Discount schedule Applied

☐

Percent Of Total(%) ⓘ

Percent Of Total Base ⓘ

--None-- ▼

Include in Percent of Total ⓘ

☐

Exclude in Percent of Total ⓘ

☐

Subscription

Subscription Type ⓘ

--None-- ▼

Subscription Term ⓘ

Cancel

Save & New

Save

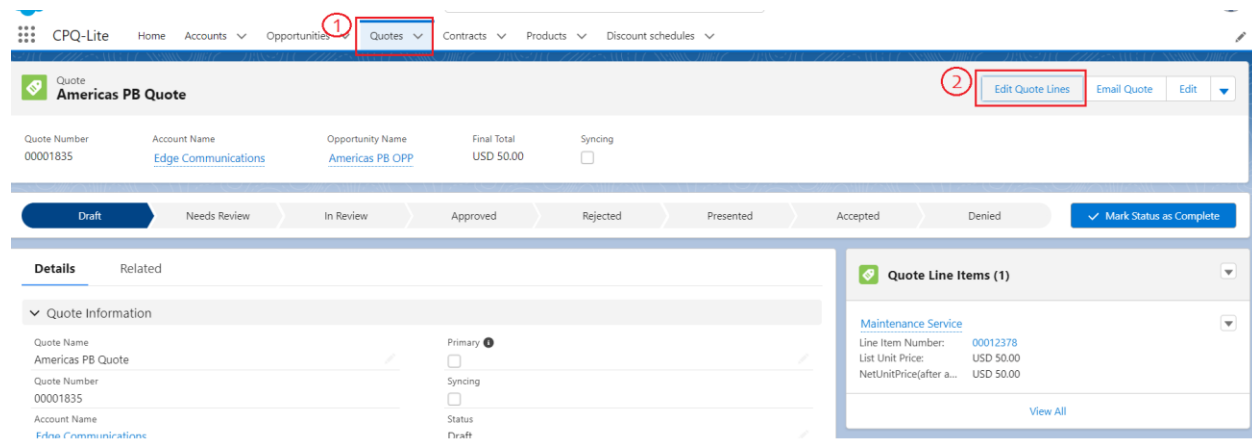
STAGE 4 – DISCOUNTED PRICE (ADDITIONAL)

These are the discounts entered manually by sales reps.

HOW TO CONFIGURE ADDITIONAL DISCOUNTS?

To add an additional discount to a product –

1. Navigate to a quote.



The screenshot shows the CPQ-Lite interface. In the top navigation bar, the 'Quotes' menu is highlighted with a red box and a circled '1'. Below the navigation bar, the 'Americas PB Quote' details page is displayed. The 'Edit Quote Lines' button is highlighted with a red box and a circled '2'. The page shows quote details such as Quote Number (00001835), Account Name (Edge Communications), Opportunity Name (Americas PB OPP), and Final Total (USD 50.00). The 'Quote Line Items' section shows a single line item for 'Maintenance Service' with a list unit price of USD 50.00 and a net unit price of USD 50.00.

2. Go to Quote line editor.

Edit Quote Lines

Quote Information

Start Date: Jun 1, 2023 End Date: Dec 1, 2023 Subscription term: 21

Additional Discount: Enter Discount

☐	Product Name	Product Code	*Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discount %	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Maintenance Service	MAINTENANCE	1	50	50	0	50	50	50

- Enter the discount in the **"Additional Discount %"** field.

Edit Quote Lines

Quote Information

Start Date: Jun 1, 2023 End Date: Dec 1, 2023 Subscription term: 21

Additional Discount: Enter Discount

☐	Product Name	Product Code	*Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discount %	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Maintenance Service	MAINTENANCE	1	50	50	10	50	50	50

- Click on Calculate to see the discounted price in **"Net Unit Price (After Additional Discount)"** field.

Edit Quote Lines

Quote Information

Start Date: Jun 1, 2023 End Date: Dec 1, 2023 Subscription term: 12

Additional Discount: 0

☐	Product Name	Product Code	*Quantity	Unit Price	Net Unit Price(After Discount Schedule)	Additional Discount %	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Maintenance Service	MAINTENANCE	1	50	50	10	45	50	45

STAGE 5 – NET PRICE

This is the final price of the product. The price after all the discounts, are applied.

▼ Pricing Information

List Unit Price ⓘ
USD 550.00

Net Unit Price (After Optional Discount) ⓘ
USD 550.00

Discount Schedule Applied
☒

Net Unit Price (After Discount Schedule) ⓘ
USD 495.00

Net Unit Price(After AdditionalDiscount) ⓘ
USD 445.50

Optional Discount ⓘ

Net Sale Price (After Optional Discount) ⓘ
USD 550.00

Discount Schedule Percent
10%

Net Sale Price (After Discount Schedule) ⓘ
USD 495.00

Total Amount ⓘ
USD 495.00

Discount ⓘ
10.00%

Final Amount ⓘ
USD 445.50