



SOLUNUS
Enabling Customer Success

CPQ LITE (Sales Rep Manual)



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OVERVIEW

Welcome to the Sales Rep Manual for CPQ Lite. This comprehensive guide is designed to assist you in effectively using the CPQ system to streamline your sales processes and maximize your sales productivity. Whether you are a new sales representative or an experienced user, this manual will provide you with the necessary information and guidance to make the most out of CPQ Lite.

With this manual, you will be introduced to

- The CPQ Lite system and its key features. You will learn how to access the system, navigate the user interface, and familiarize yourself with the various functionalities available to you as a sales representative.
- Creating Quotes and Proposals. You will learn through the process of creating accurate and compelling quotes and proposals using CPQ Lite. You will learn how to configure products, select options, and apply pricing and discounting rules to generate professional and customized quotes for your customers.
- Manage Product Catalogs. Here, you will discover how to effectively manage product catalogs within the CPQ system. You will learn how to search for products, explore product details, and utilize advanced search functionality to quickly find the right products for your customers' needs.

Throughout this manual, you will find step-by-step instructions, best practices, and tips to help you navigate CPQ Lite efficiently and effectively. By utilizing the features and functionalities of CPQ Lite, you will be equipped to streamline your sales processes, create accurate quotes and proposals, and ultimately close deals more efficiently.

We hope this Sales Rep Manual serves as a valuable resource to empower you to achieve your sales goals with CPQ Lite. Let's dive in and unlock your full sales potential with this powerful tool!

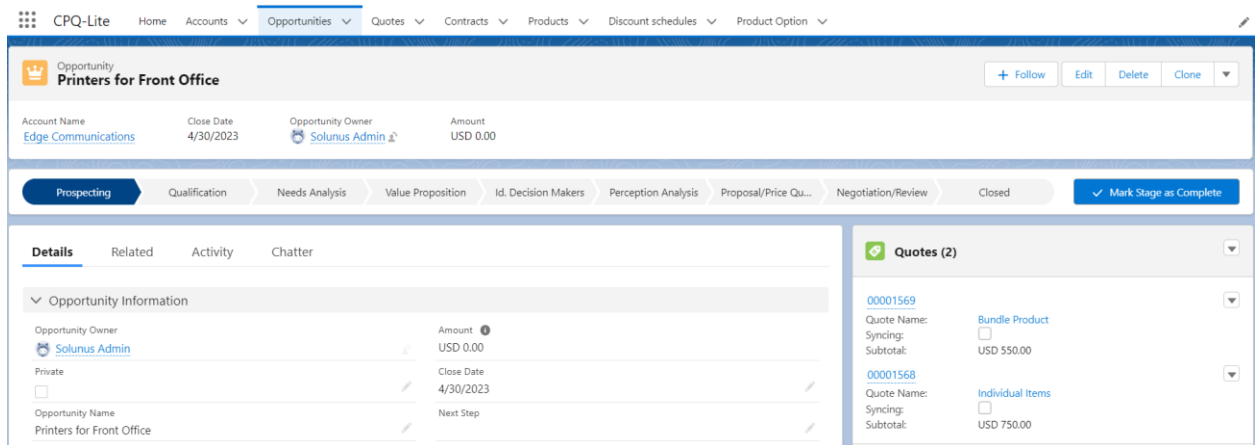
QUOTES MANAGEMENT

To provide customers with a quote in CPQ Lite, begin by creating a new quote and adding the desired products to it. You can then modify the quantities, configuration, and pricing of these products as needed before finalizing the quote.

HOW TO CREATE QUOTES?

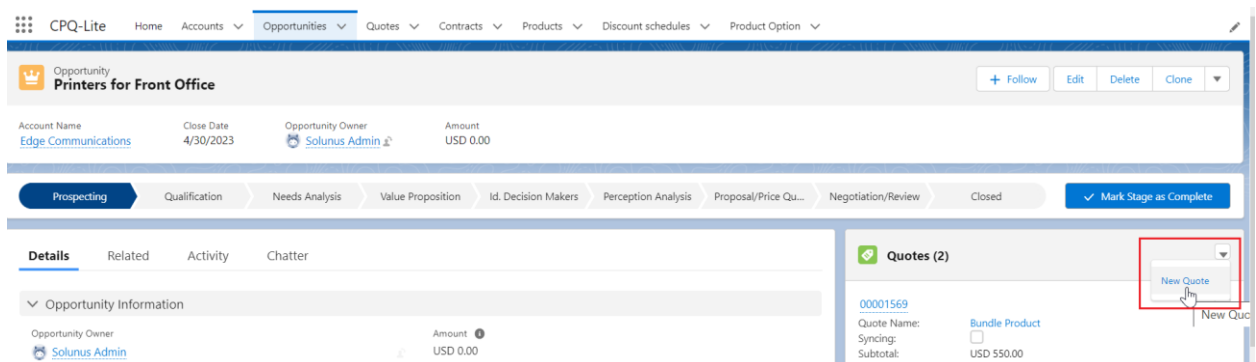
To create a quote, an opportunity is required. Once an account and opportunity are created,

1. Navigate to the Opportunity you want to quote.



The screenshot shows the CPQ-Lite interface for an Opportunity named 'Printers for Front Office'. The top navigation bar includes 'CPQ-Lite', 'Home', 'Accounts', 'Opportunities', 'Quotes', 'Contracts', 'Products', 'Discount schedules', and 'Product Option'. The Opportunity details section shows 'Account Name: Edge Communications', 'Close Date: 4/30/2023', 'Opportunity Owner: Solunus Admin', and 'Amount: USD 0.00'. The 'Details' tab is active, showing 'Opportunity Information' with fields for 'Opportunity Owner', 'Private', 'Opportunity Name', and 'Next Step'. The 'Quotes (2)' section is expanded, showing two quotes: '00001569' (Bundle Product, USD 550.00) and '00001568' (Individual Items, USD 750.00). A dropdown menu is open for the 'Quotes (2)' section, showing a 'New Quote' button.

2. Navigate to the quotes related list, click on the dropdown, and click on “New” button.



This screenshot is similar to the previous one, but the 'New Quote' button in the 'Quotes (2)' dropdown menu is highlighted with a red box and a red arrow, indicating the next step in the process.

3. Fill out the necessary information for the quote.

- Enter a name for the quote.
- Enter an expiration date for how long the quote will be valid.
- Select a status for the quote.
- Select the contact you want to send the quote to.
- Select Start date and End date of the subscription.

- Enter a subscription term which will be used to prorate eligible products by a month.

New Quote

Quote Information

* Quote Name

Initial Quotation_Printers

Quote Number

Account Name

Edge Communications

Opportunity Name

Printers for Front Office

Contact Name

Search Contacts... 

Quote Currency

USD - U.S. Dollar 

Primary 

☐

Syncing

☐

Status

Draft 

Expires On 

5/31/2023 

Type

--None-- 

Cancel

Save & New

Save

4. Click on Save.

QUOTE LINE EDITOR

The Quote Line Editor Interface is where you can view your quote lines and make changes across the entire quote or to individual lines.

The Quote Line Editor has three screens -

- Product selection - List of products as per the selected price book are displayed.
- Cart – Selected products from the catalog are added to the cart.
- Editor – Final products from the cart are added to the Editor for pricing and discounting.

QUOTE LINE EDITOR – EDITOR INTERFACE FIELDS

FIELD / FEATURE	FUNCTIONALITY
START DATE	Indicates the date on which the product or service being quoted will start. This is useful for subscription-based products or services that have a specific start date.
END DATE	Indicates the date on which the product or service being quoted will end. This is also useful for subscription-based products or services that have a specific end date.
SUBSCRIPTION TERM	Indicates the length of the subscription for the product or service being quoted. This is typically measured in months.
ADDITIONAL DISCOUNT	Allows users to apply an additional discount to the product or service being quoted. This discount is applied on top of any other discounts that may already be in place. Additional discounts can be given at the quote level as well as at the line item level. When given at both the places, line-item level overrides the quote level additional discount.
PRODUCT SELECTION	Allows users to add products or services to the quote. When clicked, a dialog box will appear with a list of available products that can be added to the quote. Users can select one or more products from this list and specify any relevant details, such as quantity or price.
DELETE LINES	This button allows users to remove one or more quote lines from the quote. Users can select the lines they wish to remove and click the Delete Lines button to remove them from the quote.
CALCULATE	Allows users to calculate the cost of the selected line items. When clicked, the quote editor will calculate the prices based on the applied pricing methods and display it on the screen. This button is useful for quickly and easily determining the cost of a quote.
SAVE	This button allows users to save the quote with all of the changes that have been made. When clicked, the quote editor will save the quote and update any relevant records in the Salesforce system. This button is important for ensuring that all changes made to the quote are saved and can be retrieved later.

QUOTE LINE EDITOR - PRODUCT SELECTION PAGE INTERFACE FIELDS

FIELD / FEATURE	FUNCTIONALITY
PRICE BOOK	Select the Pricebook. This only shows up initially if the opportunity / Quote does not have a price book assigned. If the opportunity already is assigned a Pricebook. The quote pulls in the information and the fields won't be displayed.
SEARCH PRODUCT	Searches by <i>Product Name</i> and <i>Product Description</i> in the product catalog

CATALOG	
PRODUCT CODE	Searches based on the product code
PRODUCT FAMILY	Filters based on Product Family
TYPE	Filters based on the product type

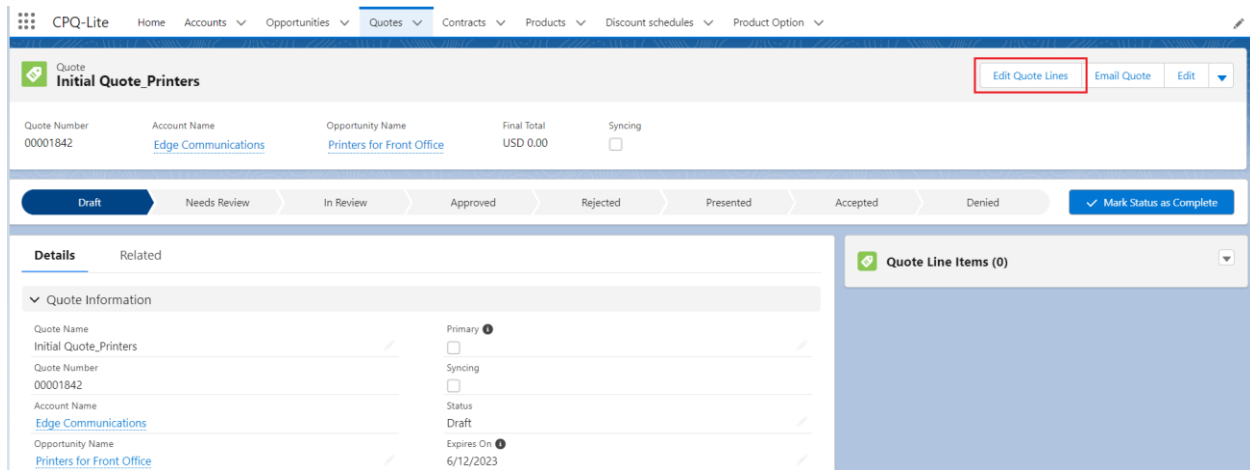
QUOTE LINE EDITOR – CART INTERFACE FIELDS

FIELD / FEATURE	FUNCTIONALITY
UNIT PRICE	Unit Price is the list price of the product
NET UNIT PRICE	This is the unit price after any systemic discount is applied.
NET SALE PRICE	This is the Net Unit Price x Quantity
TOTAL PRICE	Shows the total price of the product after all discount contributions
OFFERS BUTTON	The offers button is active only if a product has any block pricing or discount schedules assigned to it. On clicking the offers button, it shows the tier-based pricing / discounts for the product
BUNDLED	A check box appears in this row, if the product option pricing is included in the parent.
CART TOTAL	Displays the total value of the cart.
CART ITEMS	Display the number of standalone or bundle products added.
SAVE	Adds the cart items to the Quote Line Editor.
CLEAR ALL	Removes all the items from the cart.
X ICON	Removes selected items from the cart.
ADD PRODUCT	Takes you to the product selection page to add more products

HOW TO ADD PRODUCTS TO THE QUOTE?

To add products or line items to the quote,

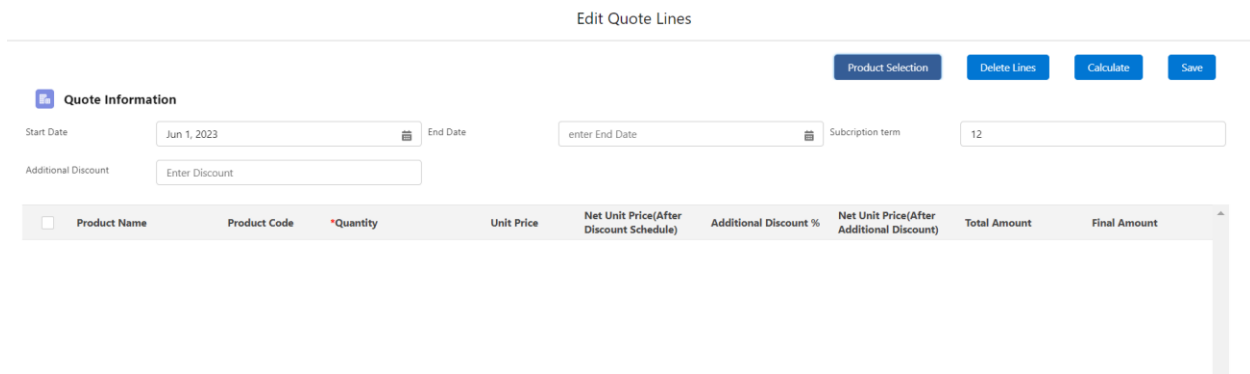
1. Click on “**Edit Quote Lines**” button.



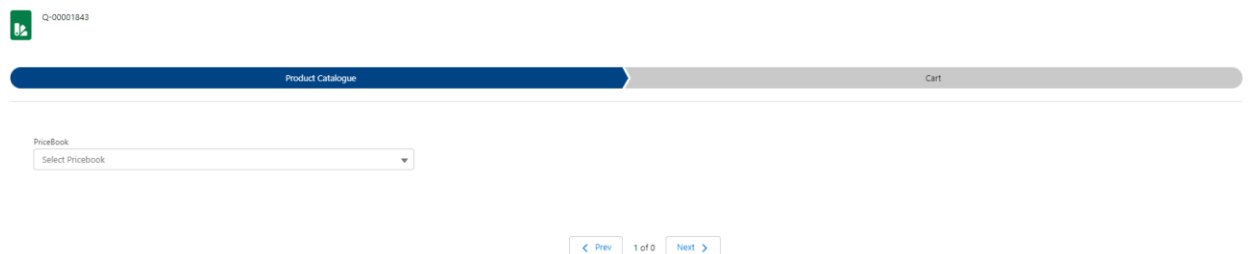
This button will open the **Quote Line Editor**. The Quote Line Editor can be used to add or remove products, apply discounts, and calculate prices for your quote.

Notice that the Start Date, Subscription Term which were filled in the quote are pulled over.

- Now, click on “**Product Selection**” button.



- This opens the Products Selection screen. If the quote is being created for the first time, you will be prompted to select a price book if not selected at the opportunity.



- As you select the Price book, The Products Selection screen shows all the products from the selected price book.

Product Catalogue Cart

PriceBook
Americas

Q Search Product Catalog...

Product Code
Q, type here...

Product Family
Select Product Family

Type
Select Type

☐ Product Name	☐ Product Code	☐ Product Family	☐ Type	☐ Product Description	☐ Price
☐ iPhone 13	IPHONE13	Hardware	Bundle	The iPhone 13 display has rounded corners that fo...	1200
☐ JBL Head Phone	JBL HP01	Hardware	Standalone		225
☐ Apple Insurance	APPLEINSURANCE	Support	Standalone	Significantly reduces the stress and cost of accide...	120
☐ iPhone 13 Case	IPHONE13CASE	Hardware	Bundle		10
☐ Sony Headphones	SONYHP	Hardware	Standalone	Headphones by SONY - On ear with microphone ~...	50
☐ Monitor - 21 inchs	MONITOR21INCHS	Hardware	Standalone	Monitor 21 inchs by Samsung	150
☐ Lenovo Bluetooth Mouse	BLUETOOTHMOUSE	Hardware	Standalone	Bluetooth mouse	10
☐ Laptop Bag 13inch	BAG13INCH	Consumable	Standalone	13inch Laptop Bag	30

[Select Products](#) [Go To Cart](#)

- Search for the required products using the **advanced search functionality**, which searches by *Product Name* and *Product Description* in the product catalog.
You can also search by *Product Code* and Filter the records based on *Product Family* and *Type*.
- Select the product and click on **“Select Products”** button to add it to the cart. You can even search for multiple products, select each of them and click on the select Products button at the end to add all the selected products.

Q, Iphone 7

Product Code
Q, type here...

Product Family
Select Product Family

Type
Select Type

☒ Product Name	☐ Product Code	☐ Product Family	☐ Type	☐ Product Description	☐ Price
☒ iPhone 7	IPHONE7		Standalone		550

[Select Products](#) [Go To Cart](#)

- All the selected products are added to the cart.

Product Selection

✓

Cart

Success
6 Products add to cart!
✕

 **Cart**
CART TOTAL : \$1202

CART ITEMS : 5 PRODUCT(S), 1 BUNDLE(S)

Product Name	Child Product	Product Code	*Quantity	Unit Price	Net Unit Price	Net Sale Price	Total Price	Bundled	Offers
 Apple Insurance		APPLEINSURANCE	1	120	120	120	120		Offers
 iPhone 7		IPHONE7	1	550	550	550	550		Offers
 Toner Recycling		TONERRECYCLING	1	5	5	5	5		Offers
 Shipping Insurance		SHIPPINGINSURANCE	1	35	35	35	35		Offers
 Inkjet Printer		INKJETPRINTER	1	250	250	250	250		Offers
	Printer Toner Cartridge	PRINTERTONER	1	125	100	100	100		Offers
	Printer Paper Tray	PRINTERPAPERTRAY	1	50	40	40	40		Offers

Save
Clear All
Add Product

8. Set quantity for each product. Based on the given quantity the Quote Line Editor will show the Net Unit Price and Net Sale Price of the Product.

 **Cart**
CART TOTAL : \$3932

CART ITEMS : 5 PRODUCT(S), 1 BUNDLE(S)

Product Name	Child Product	Product Code	*Quantity	Unit Price	Net Unit Price	Net Sale Price	Total Price	Bundled	Offers
 Apple Insurance		APPLEINSURANCE	5	120	120	600	600		Offers
 iPhone 7		IPHONE7	1	550	550	550	550		Offers
 Toner Recycling		TONERRECYCLING	1	5	5	5	5		Offers
 Shipping Insurance		SHIPPINGINSURANCE	1	35	35	35	35		Offers
 Inkjet Printer		INKJETPRINTER	10	250	250	2,500	2,500		Offers
	Printer Toner Cartridge	PRINTERTONER	1	125	100	100	100		Offers
	Printer Paper Tray	PRINTERPAPERTRAY	1	50	40	40	40		Offers

Save
Clear All
Add Product

9. Add the selected items in the cart to the Quote Line Editor by clicking on the **Save** button. It is in the Quote Line Editor, that you will be able to see the pricing calculations being done.

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 Discount %	Net Unit Price(After Additional Discount)	Total Amount	Final Amount
☐	Apple Insurance	APPLEINSURANCE	5	120	120	0	120	600	600
☐	iPhone 7	IPHONE7	1	550	495	0	495	495	495
☐	Toner Recycling	TONERRECYCLING	1	35	35	0	35	35	35
☐	Shipping Insurance	SHIPPINGINSURANCE	1	55	55	0	55	55	55
☐	Inkjet Printer	INKJETPRINTER	10	250	250	0	250	2,500	2,500
☐	Printer Toner Cartridge	PRINTERTONER	1	100	100	0	100	100	100
☐	Printer Paper Tray	PRINTERPAPERTRAY	1	40	40	0	40	40	40
☐	White Papers A4	WHITEPAPERSA4	50	0	0	0	0	0	0

[Cancel](#)

The saved line items can be seen in the quote line items related list.

Quotes > Initial Quote
Sort

Quote Line Items

10 items • Sorted by Line Item Number • Updated a few seconds ago

Product	Line Item Number ↑	List Unit Price	NetUnitPrice(after additional discount)	Quantity	Final Amount
Apple Insurance	00012404	USD 120.00	USD 120.00	5.00	USD 600.00
iPhone 7	00012405	USD 550.00	USD 495.00	1.00	USD 495.00
Toner Recycling	00012406	USD 5.00	USD 35.00	1.00	USD 35.00
Shipping Insurance	00012407	USD 55.00	USD 55.00	1.00	USD 55.00
Inkjet Printer	00012408	USD 250.00	USD 250.00	10.00	USD 2,500.00
Printer Toner Cartridge	00012409	USD 125.00	USD 100.00	1.00	USD 100.00
Printer Paper Tray	00012410	USD 50.00	USD 40.00	1.00	USD 40.00
White Papers A4	00012411	USD 0.00	USD 0.00	50.00	USD 0.00
Printer Paper Letter	00012412	USD 2.00	USD 2.00	1.00	USD 2.00
Printer High Capacity Tray	00012413	USD 100.00	USD 100.00	1.00	USD 100.00

QUOTE LINE ITEMS

Once the products are added to the quote, they are stored as Quote Lines. The Quote Lines store information about products that the sales rep has quoted.

Quote Line Item
Printer Toner Cartridge

Original Price	Quantity	Total Amount	Discount Schedule Applied
USD 125.00	1.00	USD 100.00	☐

Details

Line Item Number
00012409

Quote Name
[Initial Quote](#)

Product
[Printer Toner Cartridge](#)

Pricing Method
List

Discount schedule

Block Price Tier

Original Price ⓘ
USD 125.00

Line Item Description

Quantity

Percent of Total (%)

Percent of Total Base

Percent of Total Category

▼ Pricing Information

List Unit Price ⓘ
USD 125.00

Net Unit Price (After Optional Discount) ⓘ
USD 100.00

Discount Schedule Applied
☐

Net Unit Price (After Discount Schedule) ⓘ
USD 100.00

Net Unit Price(After AdditionalDiscount) ⓘ
USD 100.00

Optional Discount ⓘ
20%

Net Sale Price (After Optional Discount) ⓘ
USD 100.00

Discount Schedule Percent
0%

Net Sale Price (After Discount Schedule) ⓘ
USD 100.00

Total Amount ⓘ
USD 100.00

Discount ⓘ
0.00%

Final Amount ⓘ
USD 100.00

QUOTE LINE ITEMS – FIELDS

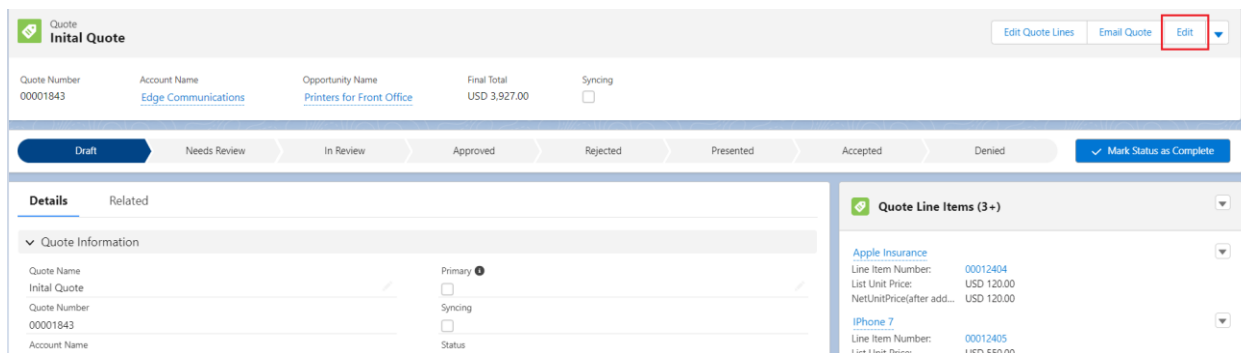
FIELD	DESCRIPTION
List Unit Price	Quoted Price of the Product.
Optional Discount	Discount from the Product Option. Only applicable (if any) when the product is purchased in a bundle
Net Unit Price (After Optional Discount)	Per unit price of the product after any optional discount is applied. List Unit Price – Optional Discount
Net Sale Price (After Optional Discount)	Sale Price after optional discount is applied. Net Unit Price (After Optional Discount) x Quantity
Discount Schedule Applied	Indicates a discount schedule is applied when checked.
Discount Schedule Percent	Shows the discount schedule percentage applied based on the quantity selected
Net Unit Price (After Discount Schedule)	This is the net unit price after a second level of discount. Calculated as Net Unit Price (After Optional Discount) – Discount Schedule

Net Sale Price (After Discount Schedule)	Sale Price of the product after discount schedule is applied. Net Unit Price (After Discount Schedule) x Quantity
Total Amount	Price after all systemic discounts are applied. This is same as the Net Sale Price (After Discount Schedule)
Discount	Additional Discount (applied on top of systemic discounts. This is applied manually)
Net Unit Price (After AdditionalDiscount)	Per unit price after all the discounts are applied. Net Unit Price (After Discount Schedule) – Additional Discount
Final Amount	Final Sale price of the product after all the discounts are applied. Net Unit Price (After Additional Discount) x Quantity
Pricing Method	Pricing Method applicable for the quote line item
Discount Schedule	The discount Schedule applied on the quote line.
Block Price Tier	Specifies the pricing tier for the product based on the predefined blocks or quantity ranges.
Percent of Total Percent	Indicates the percentage value that will be applied to calculate the percent of total.
Percent of Total Base	Indicates the base value on which the percent of total percent is calculated.
Percent of Total Category	Is the link between the percent of total product and the products that you are taking a percentage of.
Start Date	Start date of the contract
End Date	End date of the contract

HOW TO EDIT THE QUOTES

To **edit** a particular quote –

1. Click on the “**Edit**” button in the quote.



The screenshot displays the SOLUNUS Quote Management interface. At the top, there's a header bar with a green checkmark icon and the text 'Quote Initial Quote'. To the right of this bar are three buttons: 'Edit Quote Lines', 'Email Quote', and 'Edit' (which is highlighted with a red rectangle). Below the header bar, there's a section for quote details including 'Quote Number' (00001843), 'Account Name' (Edge Communications), 'Opportunity Name' (Printers for Front Office), 'Final Total' (USD 3,927.00), and 'Syncing' (checkbox). Below this is a progress bar with stages: Draft, Needs Review, In Review, Approved, Rejected, Presented, Accepted, and Denied. The 'Draft' stage is currently selected. Below the progress bar, there's a 'Details' tab and a 'Related' tab. The 'Details' tab is active, showing 'Quote Information' with fields for 'Quote Name' (Initial Quote), 'Quote Number' (00001843), and 'Account Name'. To the right of these fields are checkboxes for 'Primary', 'Syncing', and 'Status'. On the right side of the interface, there's a section titled 'Quote Line Items (3+)' which lists two items: 'Apple Insurance' and 'iPhone 7', each with its 'Line Item Number', 'List Unit Price', and 'NetUnitPrice(after add...)'.

2. Edit the required fields and Save.

To edit Quote Line Items of a particular quote

1. Navigate to the Quote Line Editor by clicking on the **“Edit Quote Lines”** button.

Edit Quote Lines

[Product Selection](#)
[Delete Lines](#)
[Calculate](#)
[Save](#)

Quote Information

Start Date: Jun 1, 2023 End Date: enter End Date 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
☐	Apple Insurance	APPLEINSURANCE	5	120	120	0	600	600	600
☐	iPhone 7	IPHONE7	1	550	495	0	495	495	495
☐	Toner Recycling	TONERRECYCLING	1	35	35	0	35	35	35
☐	Shipping Insurance	SHIPPINGINSURANCE	1	55	55	0	55	55	55
☐	Inkjet Printer	INKJETPRINTER	10	250	250	0	250	2,500	2,500
☐	Printer Toner Cartridge	PRINTERTONER	1	100	100	0	100	100	100
☐	Printer Paper Tray	PRINTERPAPERTRAY	1	40	40	0	40	40	40
☐	White Papers A4	WHITEPAPERSA4	0	0	0	0	0	0	0

2. Make the required changes and hit save.

CLONE QUOTES WITH QUOTE LINES

The "Clone with Quote Lines" functionality is a feature that allows you to duplicate an existing quote quickly and easily in the system, including all the line items associated with that quote.

When you select the "Clone with Quote Lines" button, the system creates a new quote that is an exact replica of the original, including all the line items and their associated details such as quantities, prices, and descriptions. You can then modify any of the fields as needed.

This saves time and reduces the likelihood of errors by eliminating the need to manually recreate a quote and its line items.

To Clone a Quote along with the related line items,

1. Navigate to the Quote you want to clone.
2. Click on the **“Clone with Quote Lines”** button!

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

Quote Initial Quote [Edit](#) [Edit Quote Lines](#) [Clone with quote Lines](#)

Quote Number: 00001843 Account Name: [Edge Communications](#) Opportunity Name: [Printers for Front Office](#) Final Total: USD 3,927.00 Syncing: ☐

Draft Needs Review In Review Approved Rejected Presented Accepted Denied [Mark Status as Complete](#)

Details Related

Quote Information

Quote Name: Initial Quote Primary: ☐ Syncing: ☐ Status: Draft

Quote Number: 00001843 Account Name: [Edge Communications](#)

Quote Line Items (3+)

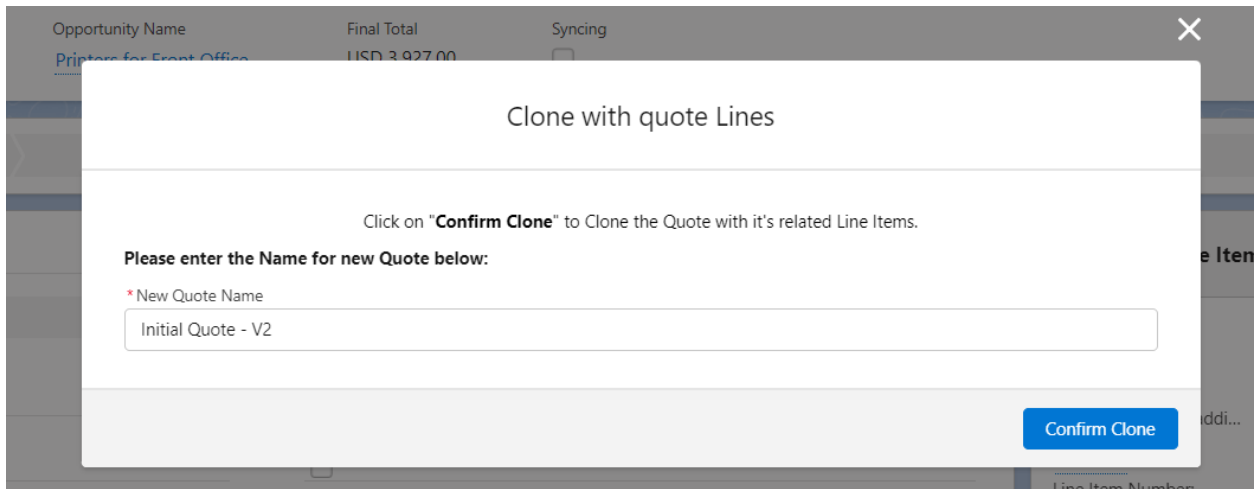
Apple Insurance

Line Item Number: 00012404
List Unit Price: USD 120.00
NetUnitPrice(after add...: USD 120.00

iPhone 7

Line Item Number: 00012405
List Unit Price: USD 550.00

3. Enter the name for the New Quote and click on Confirm Clone



Opportunity Name: Printers for Front Office | Final Total: USD 3,927.00 | Syncing: ☐

Clone with quote Lines

Click on "**Confirm Clone**" to Clone the Quote with it's related Line Items.

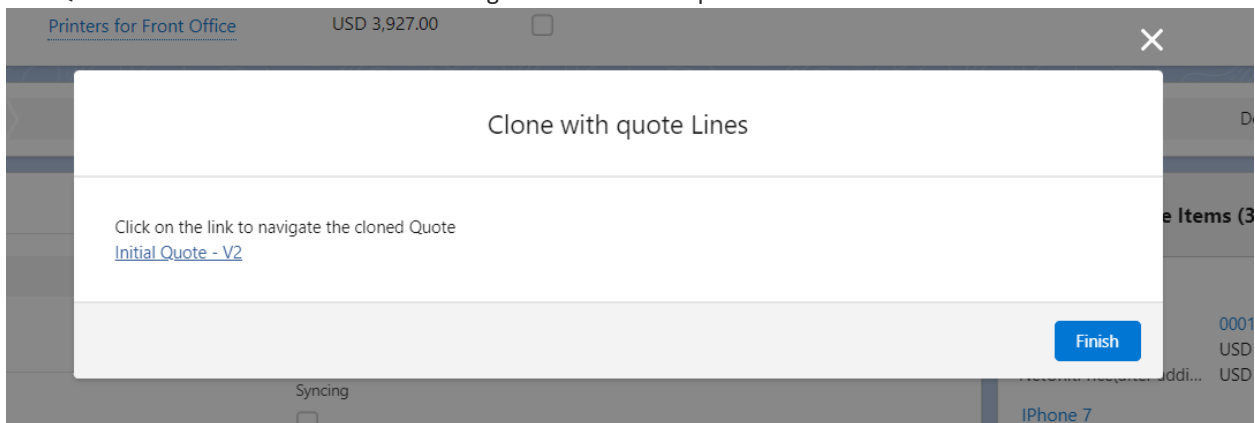
Please enter the Name for new Quote below:

* New Quote Name

Initial Quote - V2

Confirm Clone

4. Quote is cloned. Click on the link to navigate to the cloned quote



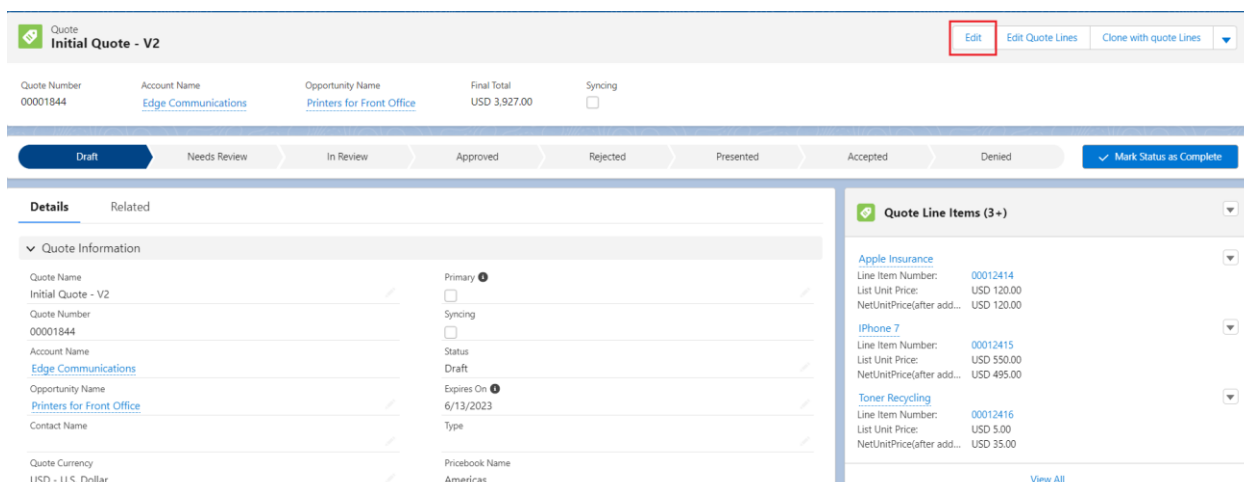
Clone with quote Lines

Click on the link to navigate the cloned Quote

[Initial Quote - V2](#)

Finish

5. When in the new quote, click on the edit button to further edit the quote.



Quote: **Initial Quote - V2** | **Edit** | Edit Quote Lines | Clone with quote Lines

Quote Number: 00001844 | Account Name: [Edge Communications](#) | Opportunity Name: [Printers for Front Office](#) | Final Total: USD 3,927.00 | Syncing: ☐

Draft | Needs Review | In Review | Approved | Rejected | Presented | Accepted | Denied | **Mark Status as Complete**

Details

Quote Information

Quote Name	Initial Quote - V2
Quote Number	00001844
Account Name	Edge Communications
Opportunity Name	Printers for Front Office
Contact Name	
Quote Currency	USD - U.S. Dollar

Primary

☐ Syncing
☐ Status
☐ Draft
Expires On: 6/13/2023
Type
Pricebook Name: Americas

Quote Line Items (3+)

Apple Insurance	
Line Item Number:	00012414
List Unit Price:	USD 120.00
NetUnitPrice(after add...	USD 120.00
iPhone 7	
Line Item Number:	00012415
List Unit Price:	USD 550.00
NetUnitPrice(after add...	USD 495.00
Toner Recycling	
Line Item Number:	00012416
List Unit Price:	USD 5.00
NetUnitPrice(after add...	USD 35.00

[View All](#)

PRIMARY QUOTE FUNCTIONALITY

This feature lets you link a quote to the opportunity that it was created from and synchronize all updates between the two records. An opportunity can have multiple quotes, but it can sync with only one quote at a time.

While a quote and an opportunity are synced, any addition or change to the list of products in one record syncs with the list of products in the other one. Adding or removing a line item from a quote updates the synced opportunity's Products related list. Adding or removing a product from the opportunity updates the synced quote's Quote Line Items related list.

To make a quote primary to sync it with its related Opportunity record,

- Check the Primary Checkbox.

Details	Related
▼ Quote Information	
Quote Name	Primary ¹
Initial Quote	☒
Quote Number	Syncing
00001843	☒
Account Name	Status
Edge Communications	Draft
Opportunity Name	Expires On ¹
Printers for Front Office	6/12/2023
Contact Name	Type

CONTRACT GENERATION

A contract is generated automatically as soon as the opportunity is Closed Won.

An Opportunity identifies a generated quote in the form of a contract field which is checked when contract is created.


Opportunity
New Office Set Up

Private	☐	Close Date	5/7/2023
Opportunity Name	New Office Set Up	Next Step	
Account Name	Edge Communications	Stage	Closed Won
Type		Probability (%)	100%
Lead Source		Primary Campaign Source	
Opportunity Currency	USD - U.S. Dollar	Price Book	Americas

CPQ Information

Synced Quote	Initial Quote_New Office Setup	Contracted	☒
Auto Renewal		Renewed Contract	
Created By	Solunus Admin, 5/6/2023, 5:11 PM	Last Modified By	Solunus Admin, 5/7/2023, 10:19 PM

Once created, the contract can be viewed under the contract Related list in the related Opportunity.


Opportunity
New Office Set Up


Subscriptions (0)
[New](#)


Contracts (1)
[New](#)

[00001295](#)

Contract Name: New Office Set Up_Contract
 Account Name: Edge Communications
 Status: Activated

[View All](#)

RENEWAL FORECAST – RENEWAL OPPORTUNITY CREATION

A Renewal Opportunity is created when a contract is activated.

You can identify the creation of renewal opportunity when a renewal forecast check box is checked.

Also, the created renewal opportunity is assigned to the contract.


Contract
00001295

Contract Information

Price Book Americas	Contract Owner  Solunus Admin
Account Name Edge Communications	Status Activated
Contract Number 00001295	Contract Start Date 6/1/2023
Contract End Date 5/31/2024	Contract Term (months) ⓘ 12
Renewal Opportunity New Office Set Up -Renewal - 2023-05-14	Renewal Term ⓘ 12
Contract Currency USD - U.S. Dollar	

Solunus CPQ Information

Renewal Quoted ⓘ ☐	Opportunity New Office Set Up
Renewal Forecast ⓘ ☒	Quote Initial Quote New Office Setup

Click on the Renewal Opportunity to drill down further into the details of the opportunity. The contract's subscription products are created as products.


Opportunity
New Office Set Up -Renewal - 2023-05-14

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Prospecting
Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Qu...
Negotiation/Review
Closed
[Mark Stage as Complete](#)

Details
Related
Activity
Chatter

Opportunity Information

Opportunity Owner  Solunus Admin	Amount ⓘ USD 55.00
Private ☐	Close Date 5/31/2024
Opportunity Name New Office Set Up -Renewal - 2023-05-14	Next Step
Account Name Edge Communications	Stage Prospecting
Type	Probability (%) 10%
Lead Source	Primary Campaign Source
Opportunity Currency USD - U.S. Dollar	Price Book Americas

Quotes (0)

Products (1)

[Apple Insurance](#)
 Product Code: APPLEINSURANCE
 Quantity: 1.00
 Sales Price: USD 55.00
[View All](#)

RENEWAL QUOTE CREATION

To create a renewal quote, Check the Renewal Quoted Checkbox to TRUE


Contract
00001295

Price Book

[Americas](#)

Account Name

[Edge Communications](#)

Contract Number

00001295

Contract End Date

5/31/2024

Renewal Opportunity

[New Office Set Up -Renewal - 2023-05-14](#)

Contract Currency

USD - U.S. Dollar

Contract Owner

 [Solunus Admin](#)

Status

Activated

Contract Start Date

6/1/2023

Contract Term (months)

12

Renewal Term

12

Solunus CPQ Information

Renewal Quoted

☒

Renewal Forecast

☒

Opportunity

[New Office Set Up](#)

Quote

[Initial Quote_New Office Setup](#)

Address Information

Billing Address

[312 Constitution Place](#)

[Austin, TX 78767](#)

You can Identify the created renewal quote in the renewal opportunities **Synced Quote** field.


Opportunity
New Office Set Up -Renewal - 2023-05-14

Private

☐

Opportunity Name

New Office Set Up -Renewal - 2023-05-14

Account Name

[Edge Communications](#)

Type

Lead Source

Opportunity Currency

USD - U.S. Dollar

Close Date

5/31/2024

Next Step

Stage

Prospecting

Probability (%)

10%

Primary Campaign Source

Price Book

[Americas](#)

CPQ Information

Synced Quote

[Renewal Quote](#)

Auto Renewal

☒

Created By

 [Solunus Admin](#), 5/14/2023, 12:57 AM

Description

Contracted

☐

Renewed Contract

[00001295](#)

Last Modified By

 [Solunus Admin](#), 5/17/2023, 8:09 PM

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