Salesforce CPQ Analytics

Administrator Guide

Package Version 1.0

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Contents

Introduction

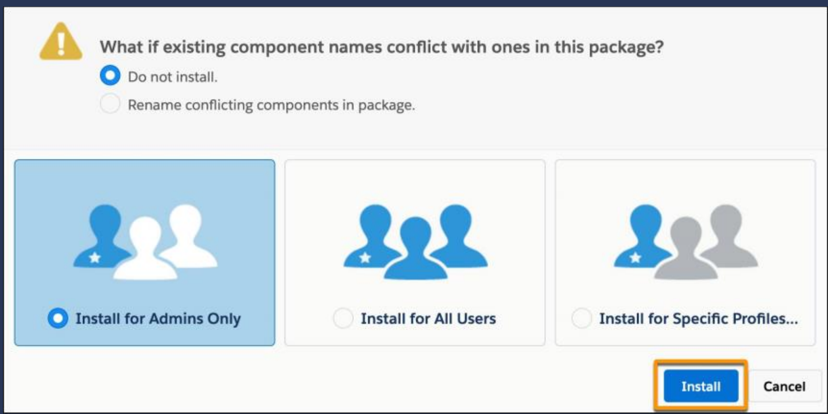
The Salesforce CPQ Analytics package provides a starting point for reporting on your Salesforce CPQ implementation, providing key sales and configuration metrics with pre-built reports and a dashboard. Following installation, all items are fully configurable and can be customised to suit your business needs.

Installing the Application

1. Click the ‘Get It Now’ button on the AppExchange listing

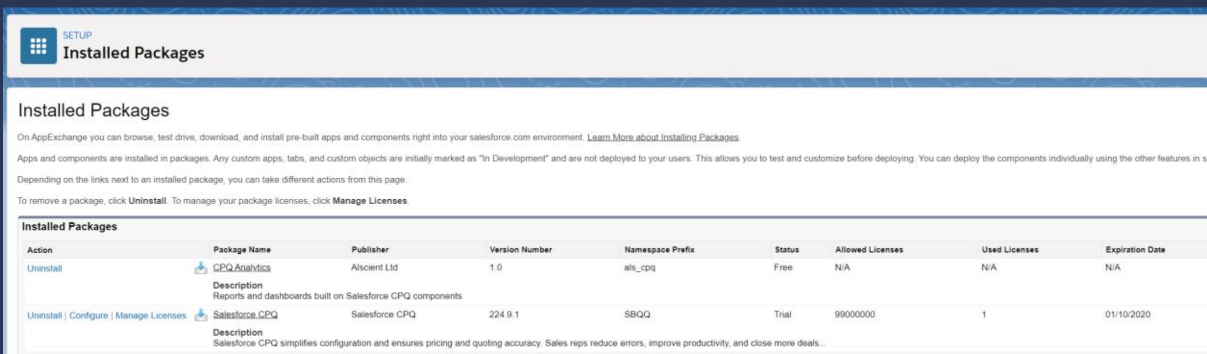
2. Log into the Salesforce account you wish to install the package in

3. Choose who you would like to install the package for. If you choose to install the package for admins only, you will be able to grant other users access to the reports and dashboard later.



4. Wait to receive an email confirming that the package has been successfully installed

5. Verify that the package has been correctly installed by navigating to Setup -> Installed Packages



For more information, see Installing Packages.

Accessing the Dashboard

1. Navigate to the dashboards tab -> All Folders -> CPQ Analytics

2. Click the drop-down arrow to the right of the folder and click Share to choose which users, roles and public groups you would like to be able to view/edit the dashboard

3. Click on the folder name to open it, then click CPQ Dashboard to open the dashboard

For more information, see Share a Report or Dashboard Folder in Lightning Experience.

Understanding the Dashboard Metrics

The figures displayed in each dashboard component are explained below:

Total Opportunity Amount by Owner – shows the total amount on opportunities due to close in the next 60 days, grouped by sales rep and further by stage

Product Total Quoted Amount – shows the total, all-time value of quote lines for each product, grouped by Quote Status. Only quote lines from primary quotes are displayed

Average Quote Discount Amount – for each sales rep, shows the total amount they have discounted as a percentage of their total quoted list price

Contracts Expiring Soon – shows the number of contracts ending in this or the next month

Open Opportunities without CPQ Quotes – for each month shows the number of closing opportunities without an associated CPQ quote, grouped by opportunity stage

Contracted Prices By Account – for each account shows the number of related contracted prices – drill down to the report to see the detail for a given account

Primary Quotes without Quote Lines – shows the number of CPQ quotes marked as primary that have no associated lines, grouped by owner and status

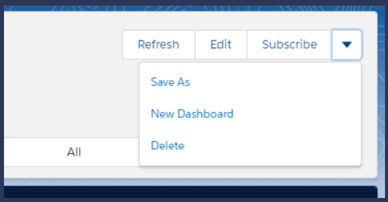
Products without recent Quote Lines – shows the number of products that have not been added to a quote in the past 365 days

Product Options without Features – shows the total number of product option records that have no specified feature value

Customising the Dashboard

1. To edit the existing dashboard, click the Edit button in the top right

2. To clone the dashboard and alter a copy of it click the drop-down arrow -> Save As, name the cloned dashboard and click the Edit button once it has been created



3. You will now be in the dashboard editor where you are free to add, remove, edit and move any dashboard components or filters

For more information, see Build a Lightning Experience Dashboard.

Accessing the Reports

1. Navigate to the reports tab -> All Folders -> CPQ Analytics

2. Click the drop-down arrow to the right of the folder and click Share to choose which users, roles and public groups you would like to be able to view/edit the reports

3. Click on the folder name to open it, then click on a specific report name to access that report

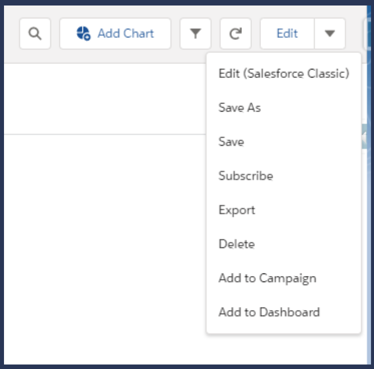
4. You can also access a report directly from the dashboard, by clicking the View Report hyperlink at the base of a component

For more information, see Share a Report or Dashboard Folder in Lightning Experience.

Customising the Reports

1. To edit an existing report, click the Edit button in the top right

2. To clone the report and alter a copy of it click the drop-down arrow -> Save As, name the cloned dashboard and click Edit once it has been created



3. You will now be in the report builder, where you are free to customise the report

For more information, see Build a Report in Lightning Experience.

Working in Salesforce Classic

It is possible to view the dashboard, view the reports and customise the reports in Salesforce Classic. Navigate to the relevant reports or dashboard using the tabs and folder structures. However, it is not possible to edit the dashboard in Salesforce Classic so you will need to switch to Lightning Experience to do so.

For more information about switching between Salesforce Lightning and Salesforce Classic, see Toggle or Switch between Lightning Experience and Salesforce Classic.

For more information about editing reports in Salesforce Classic, see Build a Report in Salesforce Classic.