

User Guide

Salesforce CPQ Accelerator Powered by Infosys

Applies to:	Salesforce practitioners
Objective:	This document provides work instructions for installing “ Salesforce CPQ Accelerator Powered by Infosys ”
Policy or Handbook Reference	N/A
Prerequisites	N/A

Introduction

This document provides step-by-step instructions for installing “**Salesforce CPQ Accelerator Powered by Infosys**” application.

Goals

To help manage the CPQ configuration data and assess the setup best practices.

Scope

Salesforce CPQ implementation

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Installing Salesforce CPQ Accelerator App

Follow the steps below to install the app:

1. Navigate to the listing using following link

Listing link

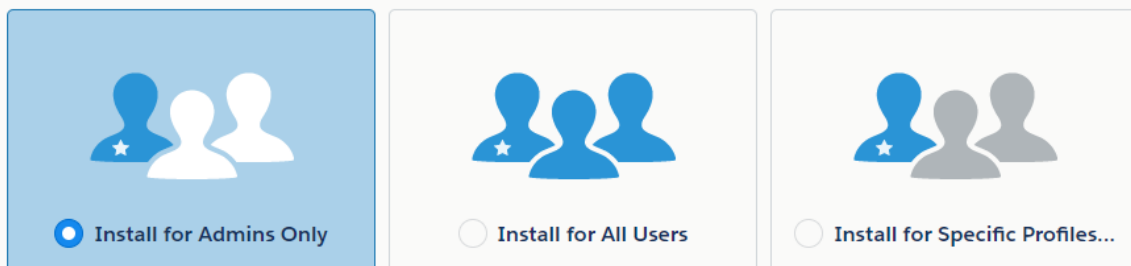
2. Click on Get it now button under listing

Get It Now

3. Login into any **CPQ sandbox** environment.
4. You will be asked to select the profiles for which this application should be available.
Selection the first option '**Install for Admins Only**'

Install CPQ Accelerator Powered by Infosys

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5. Salesforce will notify you if the installation is successful or failed.
6. You may verify the status of installation under installed packages.



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7. Open the installed app using app launcher



8. Verify if the below tabs are available under the app.



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Application Overview

Salesforce CPQ is the product from Salesforce to manage advanced sales process, via Configure /Pricing & Quote. The implementation involves considerable amount of configuration data to be managed & there is not many tools to manage it seamlessly. The configuration data is crucial for the successful setup of CPQ. Additionally, the interdependencies among the configuration data need to be managed, which directly impact release accuracy. These are usually managed manually. Currently, there is no direct solution to manage these nuances around CPQ implementation processes. Salesforce practitioners rely on manual processes and trial-and-error approach. Also, there is no benchmarking to measure the implementation best practices.

CPQ Accelerator is aimed to improve the efficiency of Salesforce CPQ implementation during various phases of delivery processes. The application contains the following tabs:

1. Home

a. FAQ

b. Useful Tips

Contains tips for customizing CPQ Accelerator.

2. CPQ Dashboard

a. Migration Explorer

Migration explorer provides the view of CPQ configuration data created for this implementation, which may be required to be applied in the higher environments. This feature also provides the snapshot of the configuration data present across CPQ objects, pictorial representation

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of sequence of data migration, and SOQL commands, which can be exported.

b. Integrity Check

Integrity check performs referential dependency verification on fields and objects across CPQ configuration data. This will ensure identification of non-compliant referential records in the dev environment before it is migrated to higher environment.

c. Dependency Check

Dependency checks helps to identify referenced fields in the CPQ configuration data before they are deleted or renamed.

d. Duplicate Check

Duplicate check helps to identify potential duplicates in product rules, price rules and approval rules by matching the conditions.

e. CPQ Health

Health check performs the assessment of implementation best practices on a limited set of parameters against the benchmark.

3. Reports

- a. Health reports generated by CPQ Accelerator.

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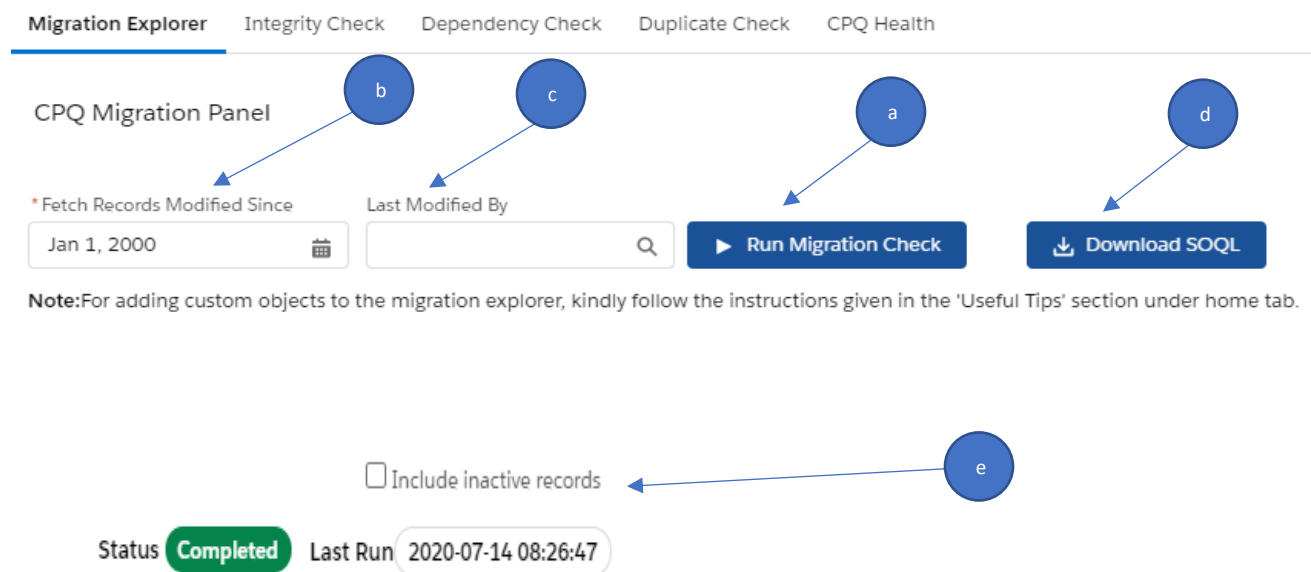
Key Features

1. Migration Explorer

i. Running Migration Explorer

Migration explorer gives a view of configuration data created for the CPQ implementation.

- Click on 'Run Migration check' button to view the data.
- Use the field 'Fetch Records Modified Since' to filter the records based on date.
- Use the field 'Last modified by' to filter the record created.
- 'Download SOQL' button gives list of SoQL queries for the configuration data.
- Option to include inactive records.

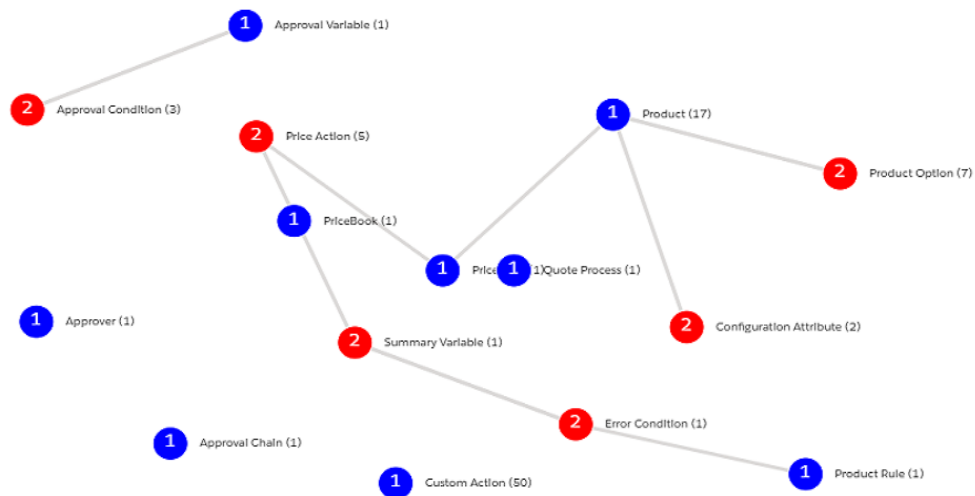


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ii. View migration data

- a. Migration explorer gives a pictorial representation of the records to be migrated. '1' – indicates that records can be migrated independently. '2'- indicates that records are dependent on parent records.



- b. Number of records to be migrated.

Migration Data Count

Product	
Object Name	Number of records
Product Feature	19
Product	60896
PriceBook	41
Product Rule	30
Error Condition	52
Product Action	12
Configuration Rule	73

Price	
Object Name	Number of records
Price Rule	91
Lookup Query	71
Price Action	274
Price Condition	263

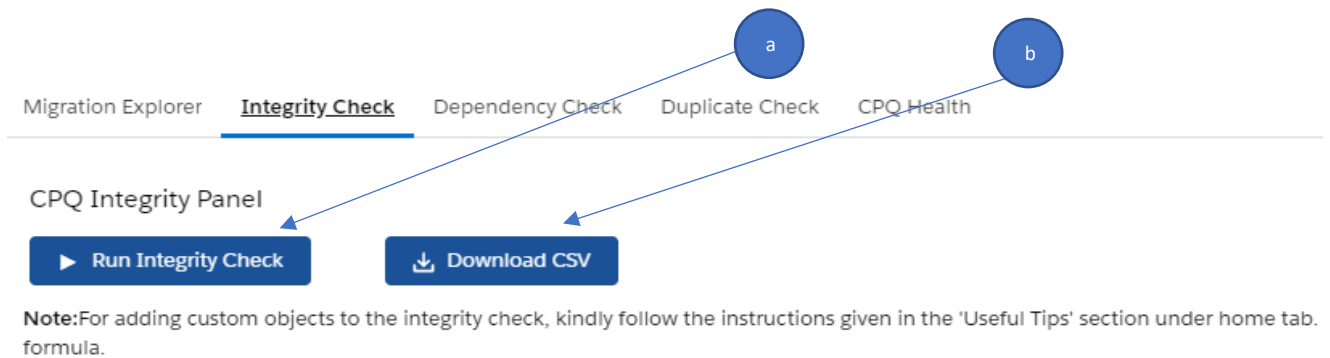
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2. Integrity Check

i. Running Integrity check

- Button to run integrity check
- Download the error records



ii. Integrity error records

- Object type- configuration object in which referential error is found.
- Error Object – Object in which referential field error is found.
- Error field- Field which is responsible for integrity issue.
- Error description – Description hyperlinked to the error record.

Field Not Found Errors(10)				Object Not Found Errors(0)	Others(0)
☐ Object Type	☐ Error Object	☐ Error Field	☐ Error Description		
☐ Approval Condition	Opportunity	invalid__c	invalid__c not found in the object Opportunity		
☐ Lookup Query	Product Option	invalid__c	invalid__c not found in the object Product Option		
☐ Error Condition	Product Option	xsyz__c	xsyz__c not found in the object Product Option		

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3. Dependency Check

i. Search for fields referred in CPQ configuration records

- Referenced Object – Object that referred in the CPQ configuration data.
- Referenced Field – Field that you need to check in the configuration data.

Migration Explorer Integrity Check **Dependency Check** Duplicate Check CPQ Health

CPQ Dependency Panel

* Referenced Object * Referenced Field Run Dependency Check

Note:For adding custom objects to the dependency check, kindly follow the instructions given in the 'Useful Tips' section under home tab. check.

ii. Result of the dependency check

- Object – Configuration object in which the searched field is used.
- Field – Field in which the searched field is found.
- Description -Hyper linked record in which the search field is found.

Dependency Result

☐ Referenced Ob... ▼	Referenced Field ▼	Object ▼	Field ▼	Description ▼
☐ SBQQ__Quote__c	sbqq__notes__c	SBQQ__PriceAction...	SBQQ__Field__c	sbqq__notes__c (SBQQ__Quote__c) Found in SBQQ__Field__c (SBQQ__PriceAction__c)
☐ SBQQ__Quote__c	sbqq__notes__c	SBQQ__PriceAction...	SBQQ__Formula__c	sbqq__notes__c (SBQQ__Quote__c) Found in SBQQ__Formula__c (SBQQ__PriceAction__c)

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4. Duplicate Check

i. Run duplicate check.

Migration Explorer Integrity Check Dependency Check **Duplicate Check** CPQ Health

CPQ Duplicate Panel

▶ Run Duplicate Check

⬇ Download CSV

ii. Duplicate check result

- Rules having duplicate conditions
- Object type of the condition
- Duplicate records

Note: Duplicate check is applicable to error conditions, price conditions, and approval conditions only. The other parameters, such as evaluation scope, conditions-met, calculator-evaluation-event are not considered in this version of the tool.

Duplicate Result

SI(Duplicate Set)	Parent Object Type	Object Type	Duplicate Record
1	SBQQ__ProductRule__c	SBQQ__ErrorCondition__c	Product dup1 Product dup2

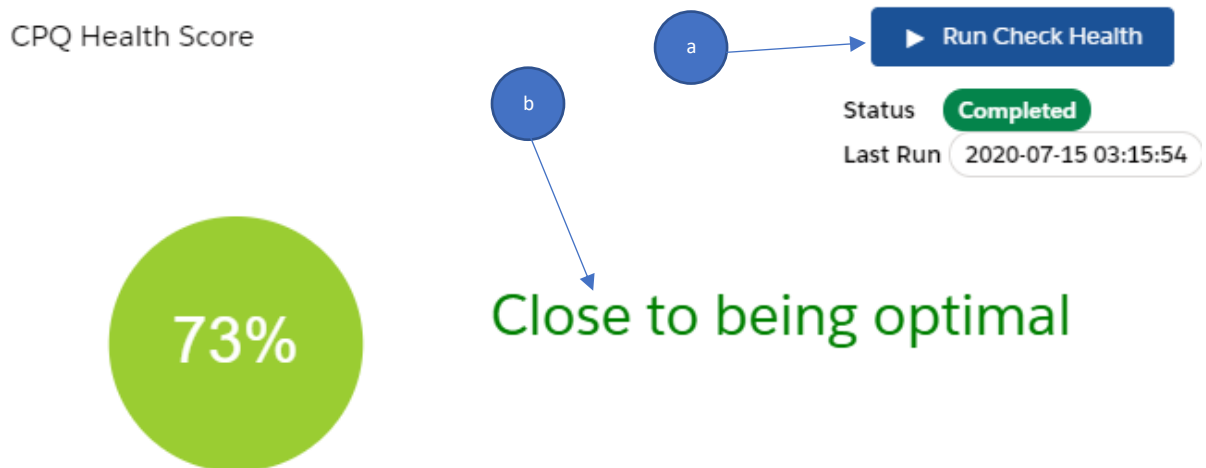
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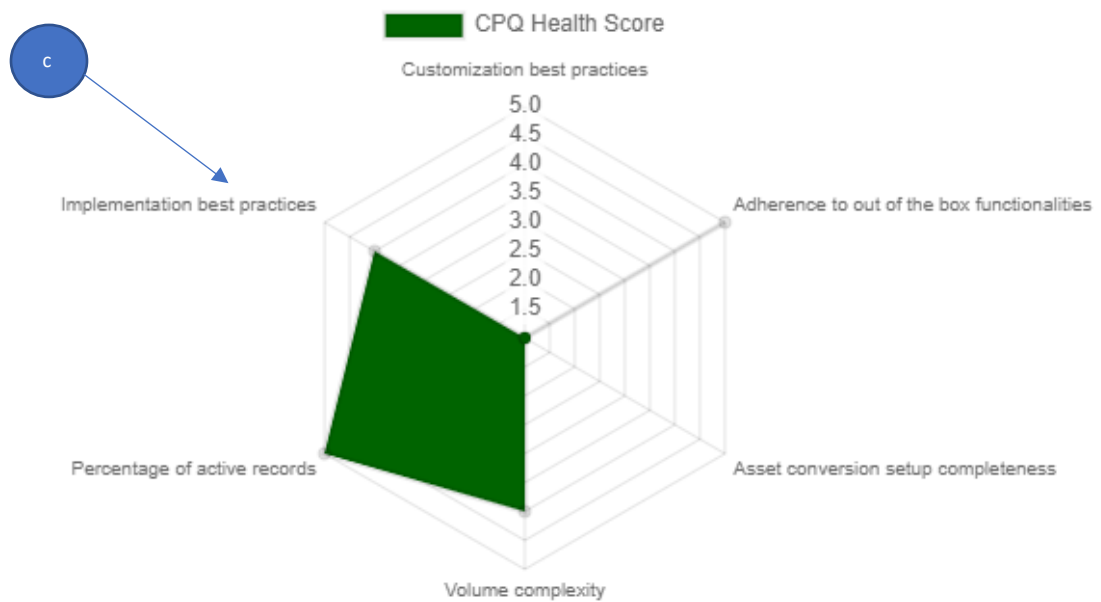
5. Health check

i. Running health check

- 'Run health check' button to trigger assessment
- Overall health score and status
- Parameters



CPQ Health Parameters



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FAQs

1. What is the recommended environment to install this app?

We recommend you install this in latest dev environment where there is an active development. For testing the CPQ Health, recently refreshed full-copy sandbox could be used (as some of the scoring is dependent on volume of data, such as Quotes).

2. Does this tool take data from the instance where it is to any external system.

We recommend you install this in latest dev environment where there is active development. For testing the CPQ Health, recently refreshed full-copy sandbox could be used (as some of the scoring is dependent on volume of data, such as Quotes).

3. Can this tool be customized?

Yes, it allows minimal customization in migration explorer, integrity check and dependency check. Customizations allowed in this tool are given below.

A. Include custom objects in migration explorer

1. Setup --> Custom Metadata
2. CPQ Reference Data --> Manage records
3. New --> Provide the following fields
 - Label
 - Reference Data Name
 - CPQ Object API (API name of the object)
 - Related Group (In order to display this object under a particular group)
 - Make field 'Is Migration Object' as true
4. Save the record and run the migration check.

B. Include lookup objects for integrity check and dependency check.

1. Setup --> Custom Metadata
2. CPQ Reference Data --> Manage records
3. New --> Provide the following fields

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Label

Reference Data Name

CPQ Object API (API name of the object)

Related Group (In order to display this object under a particular group)

Make field 'Is Migration Object' as true

4. Save the record and run the migration check.

4. How can we report any bugs or give suggestions to this tool?

Please provide your valuable suggestions in the app-exchange contact page under the support section.

5. Does this tool manipulate CPQ data.

No. This tool only reads the CPQ data in the instance for processing.

6. Who are the targeted users of this tool?

CPQ developer, CPQ admin, Release manager, Architect and Product owner

7. Where to get the detailed Health report?

Please refer the report folder "CPQ Accelerator reports" for detailed CPQ health score.

8. Why does the page not responding for long time?

Response time depends on the volume of data in the CPQ implementation. Kindly refresh the page if the response is taking long. However, if issue is still there, kindly delete records from the object 'ICPQB__CPQ_Report__c' and run the check with a different criteria.