

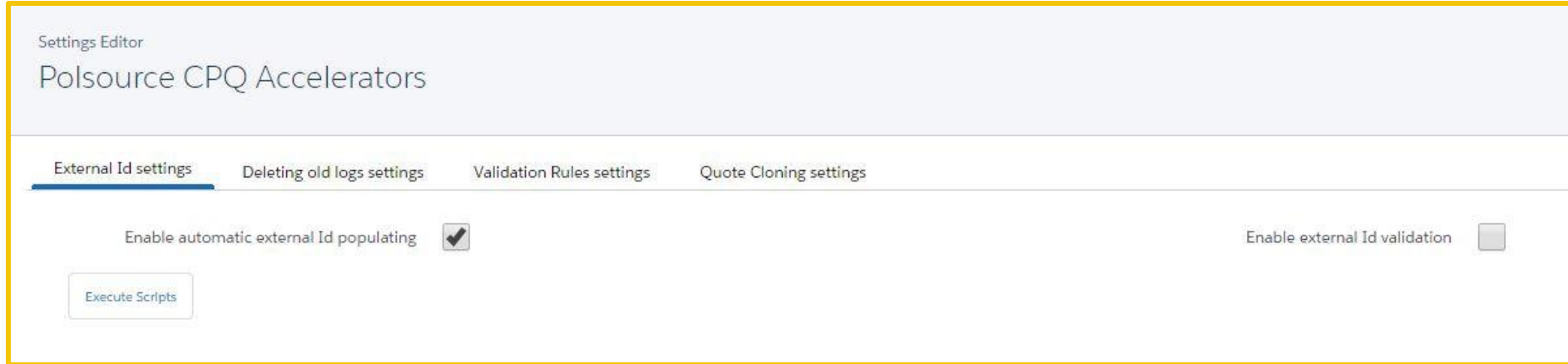
CPQ+ Accelerators Package



Benefits

- Easy data deployment between your Salesforce orgs thanks to creation of External ID fields, auto-populating, and validating them.
- Validation for Price Action formula to ensure correct configuration.
- Validation for Quote Calculator Plugin API Fields to ensure correct configuration.
- Generating and collecting information about Apex Debug Logs in an easily accessible Custom Object.
- Smart quote cloning, with or without quote lines, enhanced with admin control over which fields inherit values or re-set.

External Id Settings



The screenshot shows the 'Settings Editor' for 'PolSource CPQ Accelerators'. It features four tabs: 'External Id settings' (selected), 'Deleting old logs settings', 'Validation Rules settings', and 'Quote Cloning settings'. Under the 'External Id settings' tab, there are two checkboxes: 'Enable automatic external Id populating' (checked) and 'Enable external Id validation' (unchecked). Below these checkboxes is a button labeled 'Execute Scripts'.

Package creates a set of External ID text fields on CPQ and AdvancedApproval objects.

- “Enable automatic external id populating” - if set to True, the external ID field is auto-populated with the record ID in the source organization.
- “Enable external id validation” - if set to True, it’s not possible to save the record if the External ID field is blank. Additionally, each field is marked as an external Id, so users are prevented from creating duplicates by the system.
- If in you already have CPQ implementation you can fill External Id on existing records using custom button.

NOTE: For data migration purposes, in the source environment both checkboxes should be set to True, but in the destination environment “Enable automatic externalid populating” must be unchecked and populated with the value from source environment during data migration.

Custom Script Validator

Our Custom Script Validator ensures that all Quote, Quote Line, or Quote Line Group fields referenced by a custom script are valid. If a field doesn't exist, the validation logic generates an error message, giving immediate feedback during configuration.

Custom Script Edit

SaveSave & NewCancel

Error: Invalid Data.
Review all error messages below to correct your data.
One or more quote fields are invalid : (sbaa__EmailTemplate__c)

Information

External ID

QWa6787qh3432

Script Name

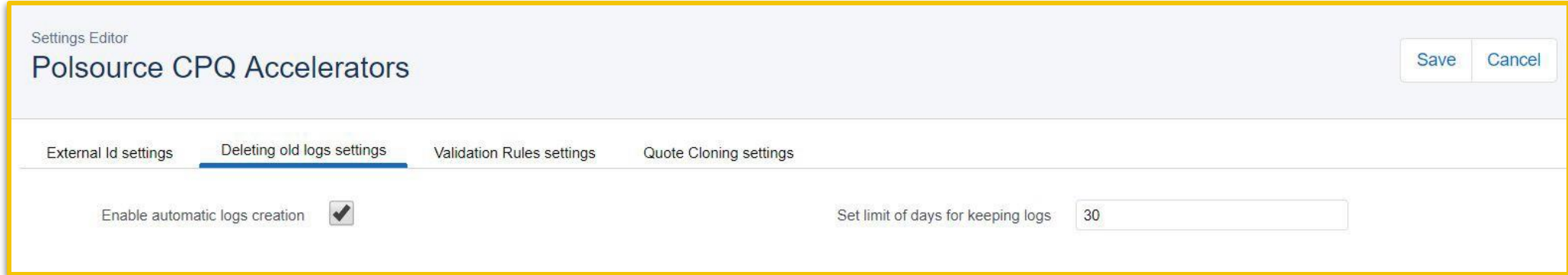
Test

Code

Quote Fields

sbaa__EmailTemplate__c

Apex Debug Logs Tool



Settings Editor

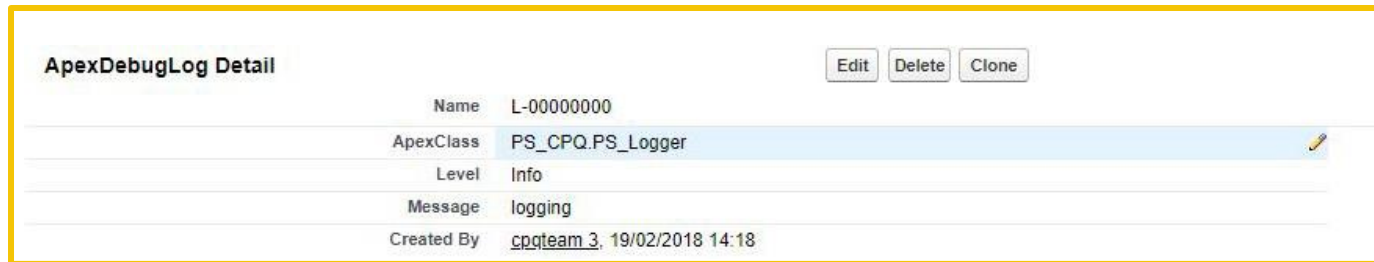
Polsource CPQ Accelerators

Save Cancel

External Id settings **Deleting old logs settings** Validation Rules settings Quote Cloning settings

Enable automatic logs creation ☒ Set limit of days for keeping logs 30

The log creation process is initiated if the first checkbox “Enable automatic logs creation” is set to True. Debug logs data are stored in custom object. User is able to define how long records should be stored in the system.



ApexDebugLog Detail Edit Delete Clone

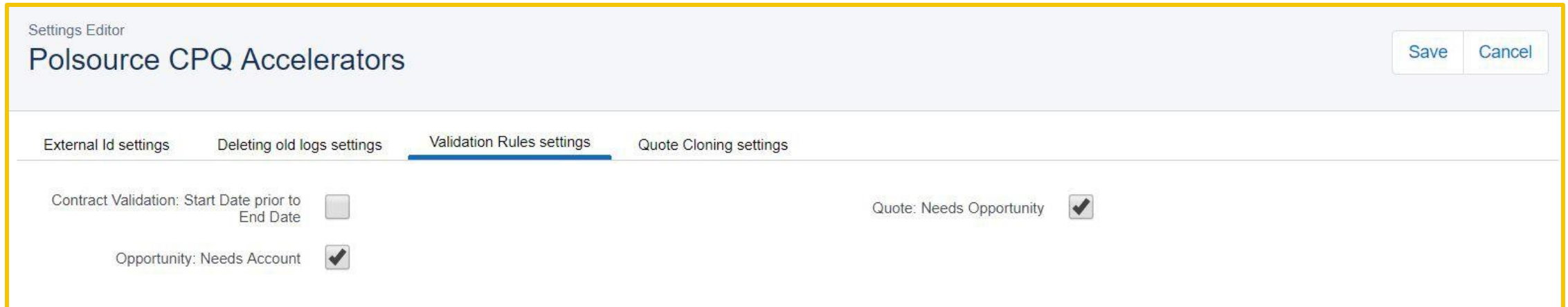
Name	L-00000000
ApexClass	PS_CPQ.PS_Logger
Level	Info
Message	logging
Created By	cpqteam 3, 19/02/2018 14:18

The custom object fills useful Apex debug log data into fields, which are simple to work with, filter, and report on.

Validation Rules

Package offers the possibility to enable the following validation rules:

- Opportunity requires an Account
- Quote requires an Opportunity
- Contract Start Date must be earlier than the End Date



The screenshot shows a web interface titled "Settings Editor" for "Polsource CPQ Accelerators". It features four tabs: "External Id settings", "Deleting old logs settings", "Validation Rules settings" (which is selected and highlighted with a blue underline), and "Quote Cloning settings". In the "Validation Rules settings" tab, there are three configuration items, each with a checkbox: "Contract Validation: Start Date prior to End Date" (unchecked), "Opportunity: Needs Account" (checked), and "Quote: Needs Opportunity" (checked). In the top right corner of the settings area, there are "Save" and "Cancel" buttons.

Validation rules can be switched on/off in package configuration settings.

Smart Quote Cloning

With this feature you can use existing Quotes as templates. In the package configuration you can define which fields should be changed during cloning and even provide a new default value for those fields. This feature allows you to clone even locked quotes.

Settings Editor

Polsource CPQ Accelerators

SaveCancel

External Id settings

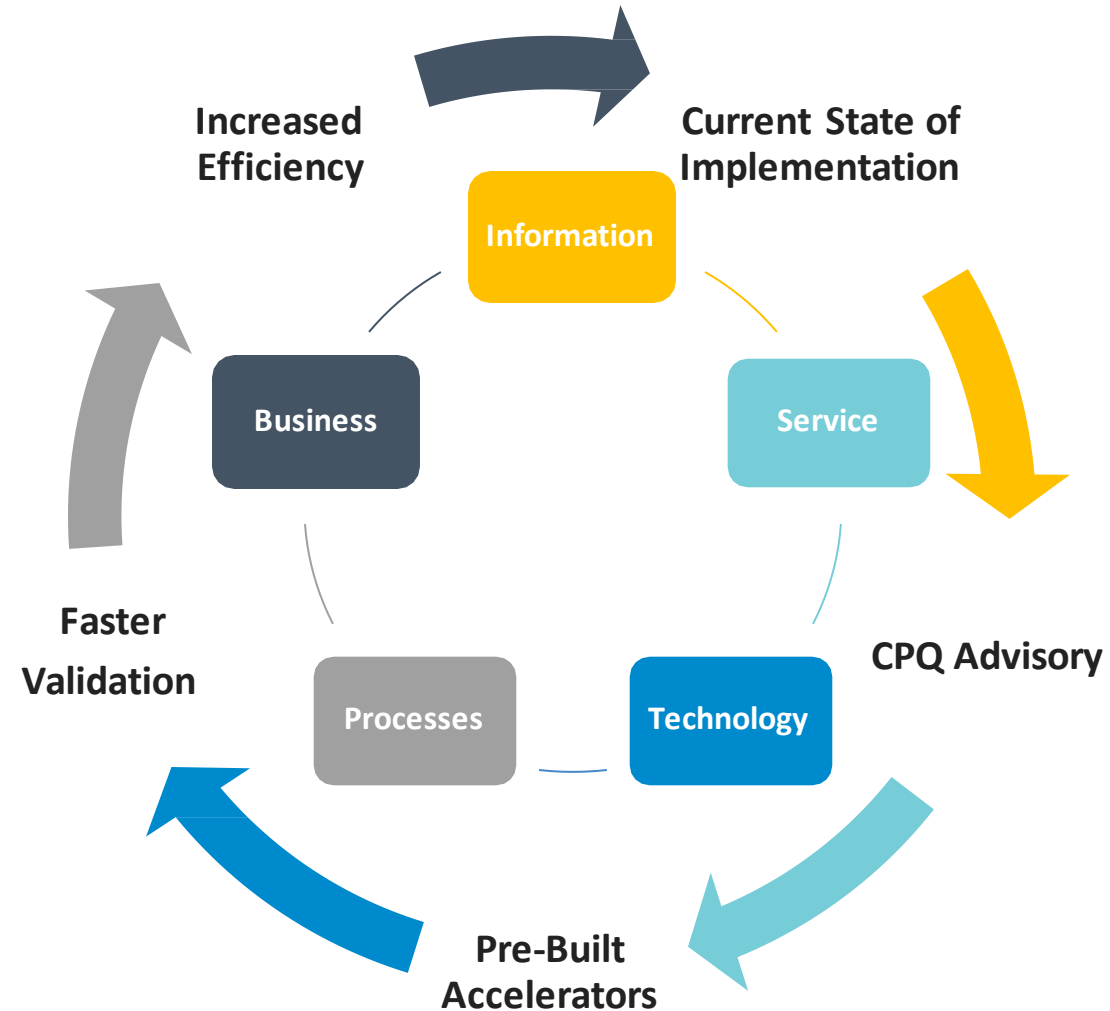
Deleting old logs settings

Validation Rules settings

Quote Cloning settings

Reset Field Name	Default Value
☐ Owner ID	
☐ Account	
☐ Bill To City	
☐ Bill To Country	
☐ Billing Frequency	Monthly
☐ Bill To Name	
☐ Bill To Postal Code	
☐ Bill To State	
☐ Bill To Street	
☐ Contracting Method	By Subscription End Date
☐ Additional Disc. (%)	

EPAM PolSource CPQ Delivery Experience



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