

CPQ Accelerators Package



Benefits

- EPAM PolSource is the largest CPQ practice in EMEA and is gaining recognition as a thought leader in the Quote To Cash space.
- We understand the complexity of good CPQ implementations, and our goal is to improve the delivery experience by innovating on the Salesforce platform.
- As part of an ongoing campaign, we are happy to offer Salesforce CPQ customers our CPQ Accelerators, which can improve efficiency, reduce implementation time, and offer extra functionality.

The accelerators included in this package are:

Duplicate
Record
Prevention
Tool

Price
Action
Formula
Validator
Tool

Custom
Script
Validator
Tool

APEX
Debug
Logs Tool

Validation
Rules

Duplicate Records Prevention Tool

Challenge

Duplicate records on CPQ objects can be an issue when migrating data between Salesforce orgs (Sandbox to Production).

☐	Action	Name ↑	Account Name	Title	Phone	Email
☐	Edit Del 	White, John		CEO	2345678901	jwhite@gmail.com
☐	Edit Del 	White, John		CEO	2345678901	jwhite@gmail.com
☐	Edit Del 	White, John		CEO	2345678901	jwhite@gmail.com

Solution

Our tool generates custom External ID fields, a best practice which helps to prevent creation of duplicates/

The tool also offers automatic population of External ID fields during data import and enables validation, all by simply ticking a checkbox in the package configuration.

This additionally helps to maintain lookup and master-detail relationships during data transfer between the orgs.

Price Action Formula Validator Tool

Challenge

The "Formula" field in Price Actions is not validated by the native Salesforce CPQ package, so there is a risk that it won't work properly. For example, when referring to a field which doesn't exist on a target object, unexpected errors can result.



The screenshot shows the 'Price Action Detail' form. It includes fields for 'Action #' (9), 'Target Object' (Quote), 'Target Field' (Unit Price), and 'Value'. The 'Formula' field contains the text 'NonExistentField__c*2', which is highlighted with a red rectangular border. Above the form are buttons for 'Edit', 'Delete', and 'Clone'.

Solution

This package includes a Formula field validator for Price Actions. The validator generates an error message if the formula is invalid (if it refers to a field that does not exist).



The screenshot shows the bottom of the form with 'Save', 'Save & New', and 'Cancel' buttons. Below them is a red error message: 'Error: Invalid Data. Review all error messages below to correct your data. Below fields are invalid: SBQQ__ListPrice__c from object/relationship SBQQ__Quote__c'.

This immediate validity feedback will save time when looking for the source of potential problems within Price Action Formulas.

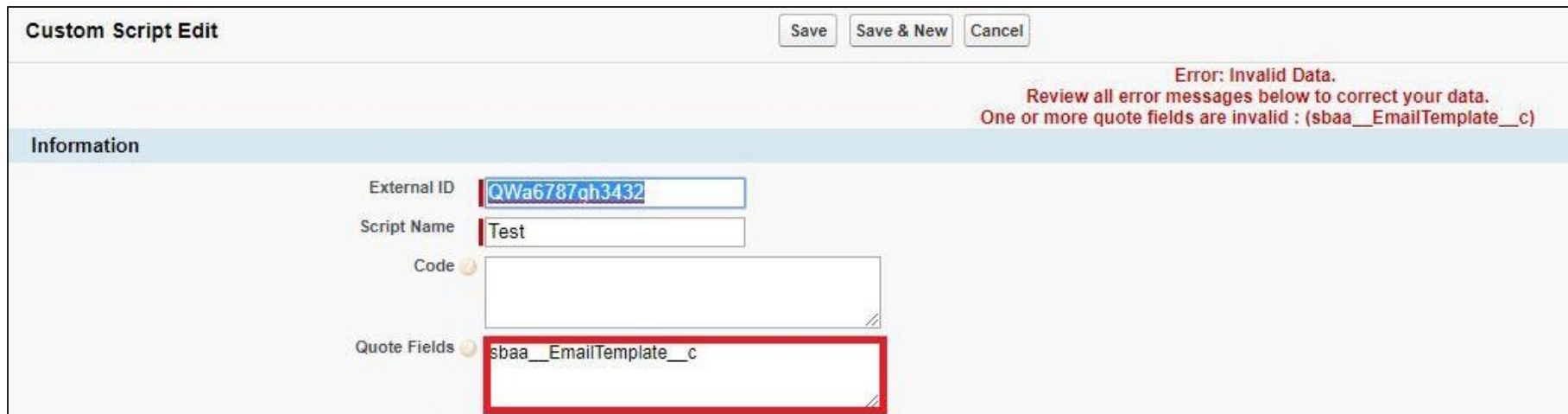
Custom Script Validator Tool

Challenge

Field references are not validated by the Salesforce CPQ package when custom script object records are created, causing Custom Scripts (such as the *AdvancedJavaScriptCalculator* or "Quote Calculator Plugin") to not work properly.

Solution

Our Custom Script Validator ensures that all Quote, Quote Line, or Quote Line Group fields referenced by a custom script are valid.



The screenshot shows the 'Custom Script Edit' interface. At the top right are buttons for 'Save', 'Save & New', and 'Cancel'. Below these is a red error message: 'Error: Invalid Data. Review all error messages below to correct your data. One or more quote fields are invalid : (sbaa__EmailTemplate__c)'. The form has a light blue header bar labeled 'Information'. Below this, there are four fields: 'External ID' with the value 'QWa6787qh3432', 'Script Name' with the value 'Test', 'Code' (empty), and 'Quote Fields' with the value 'sbaa__EmailTemplate__c'. The 'Quote Fields' field is highlighted with a red border, indicating it is the source of the error.

If a field doesn't exist, the validation logic generates an error message, giving immediate feedback during configuration.

Apex Debug Logs Tool

Challenge

Native debug logs can be difficult or inconvenient to use.

Solution

By using Apex Debug Logs, you will be able to better control the debug log process and use it in a more convenient way. This tool saves logs in an easily accessible format using a custom object.

ApexDebugLog Detail

EditDeleteClone

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 logo data into fields, which are simple to work with, filter, and report on.

Validation Rules

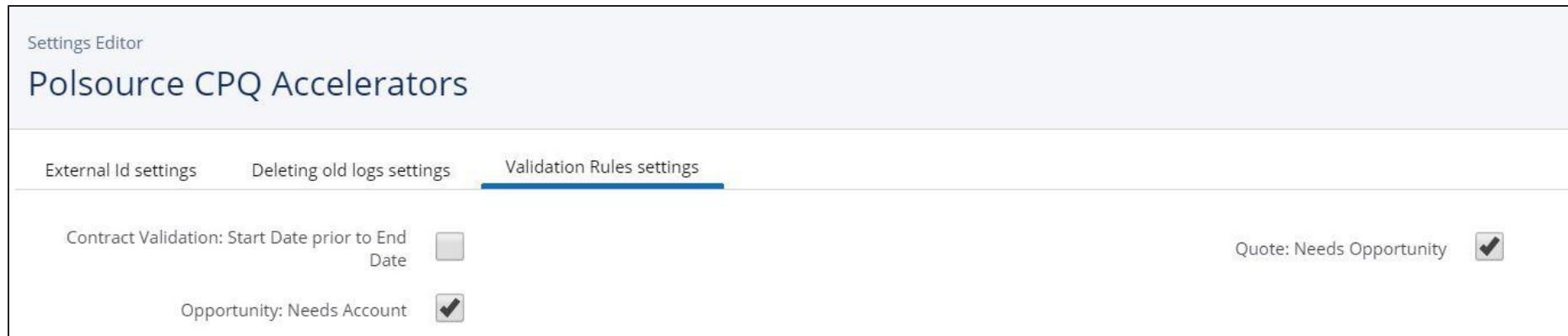
Challenge

Users are not prevented from entering invalid data.

Solution

Package offers possibility to enable following validation rules:

- Opportunity needs account
- Quote needs Opportunity
- Contract start date must be earlier than end date



Settings Editor

Polsource CPQ Accelerators

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

Contract Validation: Start Date prior to End Date ☐

Opportunity: Needs Account ☒

Quote: Needs Opportunity ☒

Validation rules can be managed in package configuration.

Accelerator Benefits

- Easy data deployment between your Salesforce orgs thanks to External ID fields, their validation, and automatic populating.
- Validation for Price Action formulas to ensure correct configuration.
- Validation for QCP API Fields to ensure correct configuration.
- Generating and collecting information from Apex Debug Logs in an easily accessible format.
- Preventing users from entering invalid data thanks to validation rules.

Package Configuration

Settings Editor

Polsource CPQ starting package

External Id settings

Enable automatic external Id populating ☐

Enable external Id validation ☒

Settings Editor

Polsource CPQ starting package

External Id settingsDeleting old logs settings

Enable automatic logs creation ☒

Set limit of days for keeping logs

Settings Editor

Polsource CPQ Accelerators

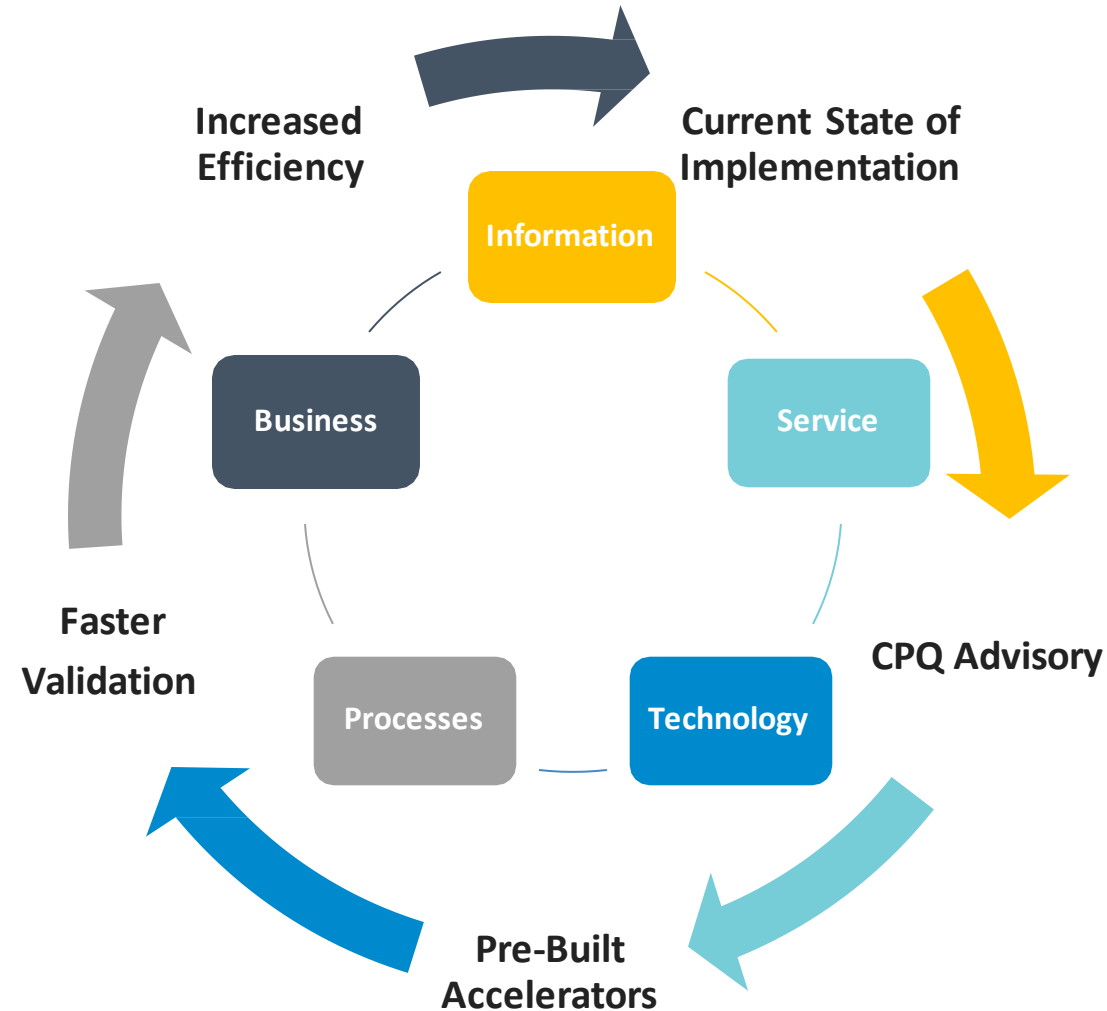
External Id settingsDeleting old logs settingsValidation Rules settings

Contract Validation: Start Date prior to End Date ☐

Opportunity: Needs Account ☒

Quote: Needs Opportunity ☒

EPAM PolSource: Improving the CPQ Delivery Experience



Contact us

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