

accelerator by  
CLARITY

SAP

CPOQ



- Introduction to SAP CPQ Accelerator By CLARITY
- Solution Architecture
- Package Options
- Implementation Assets
- Preconfigured/Prebuilt Features in SAP CPQ

# INTRODUCTION TO SAP CPQ ACCELERATOR

---

By CLARITY

The "SAP CPQ Accelerator by CLARITY" is a framework comprising of a delivery strategy with clearly defined phases and deliverables, designed to accelerate the implementation of quoting processes with SAP CPQ while also minimizing project budget wastage. In short, this Accelerator aims to shift focus on resolving gaps rather than implementing CPQ "from scratch", based on our Expertise and industry best practices.

# WHY IS THERE A NEED FOR THE SAP CPQ ACCELERATOR ?

By CLARITY

Customers across industries often need similar configurations and custom features, leading to repetitive development work, increasing costs.

Customers often struggle to understand all CPQ capabilities during the Explore phase, making it difficult to capture comprehensive requirements, resulting in increased change requests in Realize phase and budget consumption.

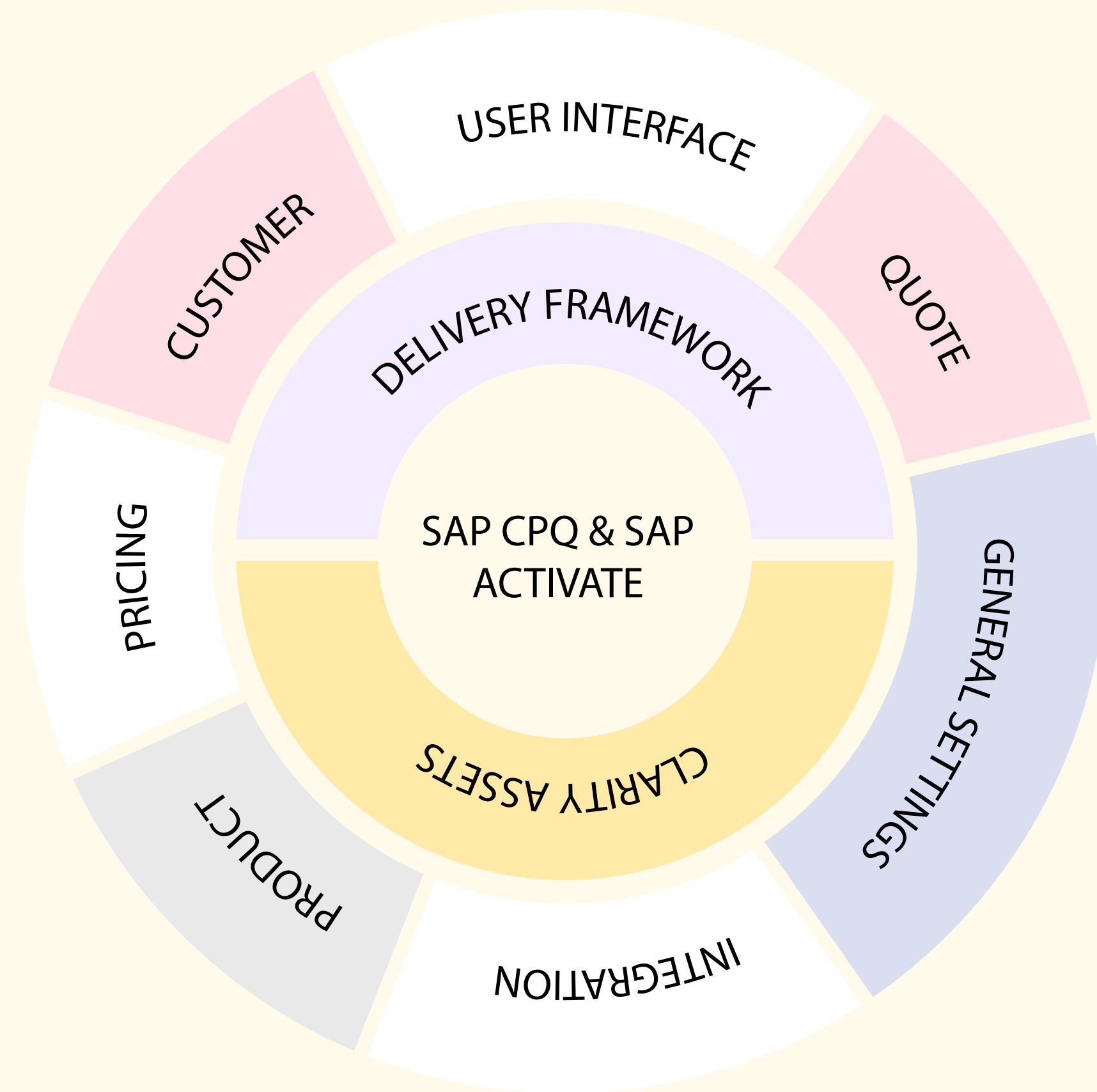
Post go-live, customers often face challenges in maintaining their solutions due to a lack of structured admin training programs, resulting in expensive support/maintenance projects.

During implementation, customers may implement features that slow down the system. It is hard to estimate the performance impact beforehand, leading to deactivation of some features and resulting in project budget loss.

# INTRODUCTION TO SAP CPQ ACCELERATOR

The SAP CPQ Accelerator By CLARITY leverages pre-built assets, including user story templates, test script templates, and pre-built features across all areas of SAP CPQ, such as quotes, products (simple, configurable, bundles), pricing, quote approval, output documents, and integrations.

Additionally, it is complemented with comprehensive training programs designed to empower SAP customers to manage their own systems effectively, post go-live.

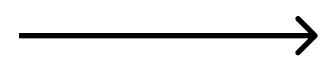


# THE DELIVERY FRAMEWORK IS BASED ON SAP'S ACTIVATE METHODOLOGY AND DEPLOYED AS FOLLOWS:

01

**Prepare**

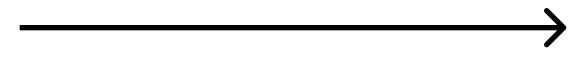
Package  
Installation



02

**Explore**

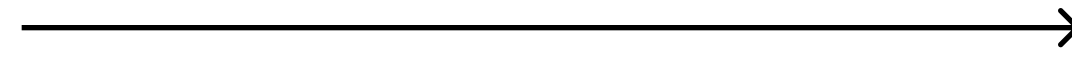
Shortened Explore phase with a  
working CPQ system



03

**Realize**

Shortened Realize phase with preconfigured  
system and prebuilt custom features

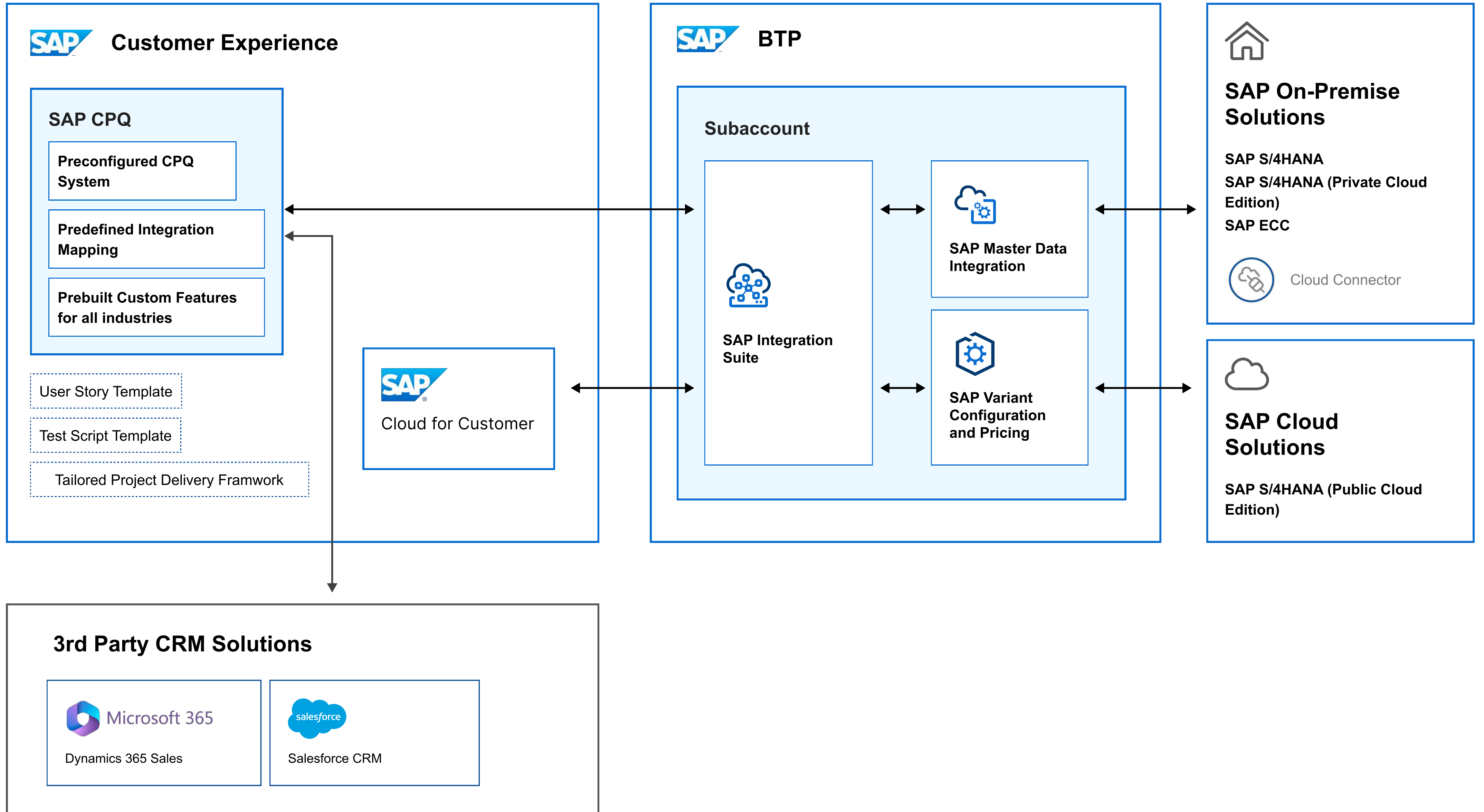


04

**Deploy and Run**

Personalised Training Programs to  
maintain CPQ Post Go-Live

# SOLUTION ARCHITECTURE



# PACKAGE OPTIONS

The CPQ Accelerator is available with 3 different packages: Essential, Advanced, Complete. CLARITY proposes the most suitable package after analysing the customer's current landscape and quoting-related requirements.

## Essential

Essential is designed for customers who want to adopt a fit-to-standard solution with best practices. This package contains features and assets required to deploy a fit-to-standard architecture.

## Advanced

Advanced is designed for customers who want to partly adopt a fit-to-standard solution with best practices but at the same time build customisations related to their current landscape. This package contains everything from Essential, plus semi-complex features and user experience enhancements.

## Complete

Complete is designed for customers who want to adopt a fit-to-standard approach with best practices as much as possible and need complex features or integrations. This package contains everything from Advanced, plus complex features and integrations.



**Essential**

**Advanced**

**Complete**

Product Administration

Product categories setup, Simple products mass upload, Products catalog sorting and filtering, Units of Measure conversion setup, Products replication setup (requires SAP back-end)

Essential + , Product master, Product bundles, Related products, Simple and Configurable (limited attributes) products mass upload

Advanced +, Customized Simple and Configurable products layout, Products master, Stock availability check, Item order history

Quote Administration

Quote lifecycle setup, User permissions, Quote validity period, Margin-Health

Essential +, Multi-level approval process, Copy Items from quote to quote, Mass quote items editing, Quote auto-expiration

Advanced +, Credit limit check, Freight terms, Master quote, Related quotes, Renewal automation

Customer Administration

Business partner replication (requires SAP back-end)

Essential +, Business partner replication from 3rd party CRM solutions

Pricing

Field predefined discounts calculations, Price books setup, Markets setup, Currencies setup, Pricing replication setup (requires SAP back-end), Guided selling

Essential +, Rolled-up discounts, Non-predefined discounts calculation, Subscription products pricing, Logistics costs, Forced Repricing, Rebates enablement

Advanced +, Pricing master, Products phasing, Pricing data mass update (requires middleware)

User Interface

Standard quote fields and layout, Standard Notifications, Permission groups, Quote visibility, Branding

Essential +, Additional quote header fields, Additional quote item fields

Advanced +, Additional quote tabs, Customized quote layout, Advanced quote messages

General Settings

User types setup, Companies' setup, Dictionaries setup

Integrations

Standard integrations enablement with SAP solutions (SAP Cloud for Customer, SAP S/4 HANA On-Prem & Cloud), 3rd party CRM integration (Salesforce.com integration, MS Dynamics), Federated Single Sign-On

Essential +, Standard integrations enablement with SAP solutions (SAP Commerce Cloud, SAP Subscription Billing), DocuSign Integration3rd party CRM integration (custom-built integrations)

# IMPLEMENTATION ASSETS

To facilitate quicker Explore, Realize and Deploy & Run phases, CLARITY proposes 3 types or artefacts:

User Story Templates

Test Script Templates

Training Programs

Extract of the artefacts:

Projects / CPQ Accelerator / CPQA-175 / CPQA-37

## Pricing - Applying Discount as a Percentage to items

Attach Add a child issue Link issue Create Add Checklist

### Description

As a Sales Representative,

I want to be able to apply a discount percentage to the List Price to produce a Net Price for any product when my Quote is in status 'Preparing' so that I can increase my chances of winning the deal.

### Acceptance Criteria

Given that the Sales Representative has a Quote in status 'Preparing' with an item already added and the Discount % field is editable

When he/she enters a discount percentage, and hits enter or Save Quote

Then the Net Price of the line item is updated with the following formula:  $(1 - (\text{Discount Percent} / 100)) * \text{List Price}$

### Test Cases

#### Test Case 1: Apply 10% Discount

**Scenario:** Applying a 10% discount to a product with a List Price of \$100.

#### Steps:

1. Navigate to the Quote in status 'Preparing'.
2. Ensure an item with a List Price of \$100 is added to the Quote.
3. Enter a Discount Percentage of 10%.
4. Hit Enter.
5. Verify the Net Price is calculated as:
  - Formula:  $(1 - (10/100)) * \$100 = \$90$ .

#### Expected Result:

- The Net Price of the line item should be updated to \$90.

### Admin Training

#### Objective

This document provides step-by-step instructions for changing the default, minimum, and maximum discount values in the CPQ application.

#### Steps to Change Discount Values

1. Navigate to: Setup → Pricing/Calculations → Discounts
2. Edit Discount Settings based on Group/User/Product Type/Category/Product
3. Change Minimum/Default/Maximum Discount
  - a. To change the minimum discount change the value in the field: **Minimal Value**
  - b. To change the default discount change the value in the field: **Default Value**
  - c. To change the maximum discount change the value in the field: **Maximum Value**
4. Hit Save

**PRECONFIGURED/  
PREBUILT FEATURES  
IN SAP CPQ**

# QUOTE STRUCTURE AND LAYOUT

Prebuilt Features

A customised layout for quote header is provided by default, based on the customer's industry, with the possibility to add/remove fields on the screen header.

Additionally, the Quote is also preconfigured with multiple Markets, Currencies and Pricebooks. User experience enhancements such as a sticky message box is also provided. See extract below.

Quote #01620463 / MASTER for Example Customer Ltd

Messages (1) Save Quote Add Item

Quotation Involved parties Documents

### Quote Info

Quote Status Preparing	Date Created 09/07/2024	Date Modified 06/08/2024	Customer Segment SME
Market Germany in EUR	Pricing Date 09/07/2024	Quote Expiration Date 28/04/2024	Opportunity Number OPP-2445426
Pricebook Germany Pricebook	Contract Start Date 10/08/2024	Contract Duration (M) 36	Opportunity Name Opportunity for Example Customer Ltd
PO Number 12452145	Contract End Date 10/08/2027		Payment Terms Net 30 Days (ZB01)
	Revision MASTER (Active)		

All 1

Quote Expire Date cannot be set to a date earlier than Quote Date Created (09/07/2024)

# QUOTE PRICING & CALCULATION & TOTALS

Prebuilt Features

A customised set of fields and calculations are available by default when the packages are installed, based on the customer's industry and pricing mechanisms. The package also provides different types of predefined Quote Totals. We also provide additional options such as checking if the products/services are available before completing the quote.

Products														Check Availability	Add Items				
	Item	Start Date	End Date	Quantity	Unit of Measure	List Price	Discount Percent	Discount Amount	Net Price	Billing Cycle	Duration (M)	Annual Contract Value (ACV)	Total Contract Value (TCV)						
<input type="checkbox"/>	1 Example One-Time 84512963	30/09/2024	30/09/2027	1.00	Each	€ 700.00	10.00	€ 70.00	€ 630.00	One-Time	1.00	€ 630.00	€ 630.00						
<input type="checkbox"/>	2 Example Recurring 8015412	30/09/2024	30/09/2027	1.00	Days	€ 7.50	0.00	€ 0.00	€ 7.50	Monthly	36.00	€ 90.00	€ 270.00						

50 items per page

Total Summary				
	Discount Percent	Discount Amount	Annual Contract Value (ACV)	Total Contract Value (TCV)
Recurring	0.00 %	€ 0.00	€ 90.00	€ 270.00
One-Time	10.00 %	€ 70.00	€ 630.00	€ 630.00

Totals	
Annual Contract Value	€ 720.00
Total Contract Value	€ 900.00

# PRODUCTS AND CONFIGURATION OPTIONS

We offer mock-ups on how to create your configurable product options and configuration rules in the system to all easier quoting.

Prebuilt Features

Current Quote / Home Category / Software / Software Subscription

Software Subscription Incomplete [Add to Quote](#) [Reset](#) [Share](#) [Star](#)

General **Volume** Services

Capacity Type ⓘ  
 No option selected  
 Transactions  
 Subscribers  
 Revenue

Block Size:

Calculation Type ⓘ  
 No option selected  
 Direct  
 Cumulative

Pricing Explanation

Committed Volume:   
Blocks:   
Annual Price:   
Total Price:

Tier Pricing

Block Tier	Tier Price
1-5	€ 750.00
6-15	€ 500.00
16-50	€ 400.00
51-9999	€ 350.00

Formula Validator [\[ Open in a New Window \]](#) [\[ Open \]](#)

Configuration Summary Configuration Tree

Part Number	Software Subscription	
Base Price	€0.00	
Base Recurring Price	€0.00 / year	
Items	One-Time	Recurring
<b>Total</b>	<b>€0.00</b>	<b>€0.00 / year</b>

# QUOTE APPROVAL

Prebuilt Features

We provide several customisable approval rules and email notification templates. Example of approval rules for Total Contract Value above a threshold, Payment Terms etc..

Approvals

This quote (#01620463) has to be approved because you violated the following rules:

Approval rule	Description	Responsible approver	Comment to approver
Total Contact Value > EUR 500,000.00	Total Contact Value is above EUR 500,000.00. This requires approval by Sales Manager.	Sales Manager	Please approve my quote because..

## Output Documents:

We offer sample quote proposal documents to allow customers to make their own customisations. We also guide customers on how to structure their quote proposals for SAP CPQ, if they have existing ones.

## Integrations:

The framework uses the standard integrations provided by SAP with enhanced object/field mappings, based on the customer's industry.