

Before You Start

As of Winter '23, Salesforce introduced a mandatory security setting that blocks some functionality covered in this course. Therefore, before you start these exercises, make sure you switch off the Lightning Web Security for Lightning Web Components in your training playground. Here's how:

1. From the Salesforce **Setup** menu, select **Setup**.
2. In **Quick Find**, search for `session`.
3. Open **Session Settings**.
4. Locate the **Lightning Web Security** heading, ensure that **Use Lightning Web Security for Lightning web components and Aura components** is unchecked, as shown here.



5. Scroll to the bottom of the **Session Settings** and click **Save** to save your changes.

Exercise 5-1: Analyze a Promotion

Promotions are created in the product console but can be viewed and amended from the Promotions/Discounts workspace in the Pricing Designer, or from the PRICING workspace of the related product or bundle in the Product Designer.

Much of the functionality of promotions can be achieved with the use of bundles, adjustments, and overrides, but there are some clear advantages to using promotions instead. Here are some examples.

- Promotions are separate and distinct from products. This means that product offers and bundles can remain intact. Any promotions you create can apply to products without altering the products.
- You can apply multiple promotions to one product.
- You can create promotions that are available to everyone, or you can use context rules to make some promotions available only to qualified customers.
- Disqualified promotions can be seen in the cart. If the customer can meet the requirements for the promotion, it will become qualified and available.
- It's possible to add promotions that apply promotional pricing to products and bundles in the cart AND to assets in the cart as part of an asset-based quote or order.

Promotions also can provide functionality based on:

- Time plan/commitment duration of the promotion:
 - You can charge a penalty for early termination of a subscription using penalty context rules.
 - You can create a follow-on promotion that automatically begins when a previous promotion ends.
- Service continuation, where you set up automatic cancellation or renewal of subscriptions once a promotion ends, based on settings in the promotion.



Here’s an example of promotions listed in the cart. Note how products which have promotions applied are clearly identified in the line items. Applied Promotions are also separately listed in the **Applied Promotions** section of the **Cart** workspace.

The screenshot displays the 'Cart (2)' workspace. On the left, a 'Catalog Preview' sidebar shows a search bar and a 'Select Category' dropdown with 'Promotions' selected. Below this, two promotion cards are visible: 'InfiStream Kids On Us' (offer for the first year) and 'Infiwave Phone 10 Intro Promo' (20% off plus \$20 data plan). The main cart area shows two items: 'InfiStream Kids On Us Applied' and '4G LTE Data Plan - Unlimited v1'. Each item has an 'Add' button, a quantity field set to 1, and pricing for one-time and recurring charges. The 'Applied Promotions' section at the bottom shows the 'InfiStream Kids On Us' promotion applied to the first item, with a commitment end date of 9/7/2024. A summary table at the bottom right shows a one-time total of \$0.00 and a recurring total of \$54.99.

Item	Quantity	One Time Charge	Recurring Charge
InfiStream Kids On Us Applied	1	\$0.00	\$0.00
4G LTE Data Plan - Unlimited v1	1	\$0.00	\$54.99

Category	Item	Description	Commitment End Date
Applied Promotions (1)	InfiStream Kids On Us	Get InfiStream Kids for free for the first year with an unlimited data plan.	9/7/2024

Category	Item	Description	Offer Starts	Offer Ends
Promotions	InfiStream Kids On Us	Get InfiStream Kids for free for the first year wit...	2/1/2020	End Date of Promotion
Promotions	Infiwave Phone 10 Intro Promo	20% off the Infiwave Phone 10 plus \$20 data pla...	1/1/2018	End Date of Promotion

You manage promotions in the cart by:

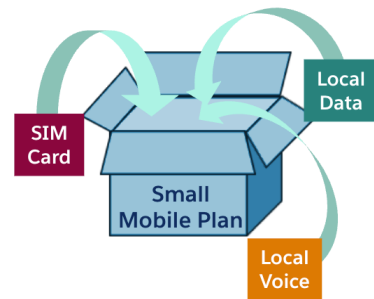
- Searching for promotions in the **Promotions** list of the cart
- Deleting promotions from the cart
- Applying promotions to products already placed in the cart

Promotions and Products

The Promotions package is a separate license to the main Industries CPQ license - so you'll need to check whether or not you have access to promotions in your Salesforce application. If you can create promotions, it's important to know what they are and when to use a promotion instead of a product or bundle.

Products:

Products represent a tangible good or service that will be sold to a customer. Products can be bundled together with the pricing of child products totaled (or "rolled up") and added to the price of the parent product.



- Can contain multiple bundles
- Can be used on an ongoing basis and typically do not expire soon
- Contain products or quantities of each product that are not necessarily limited

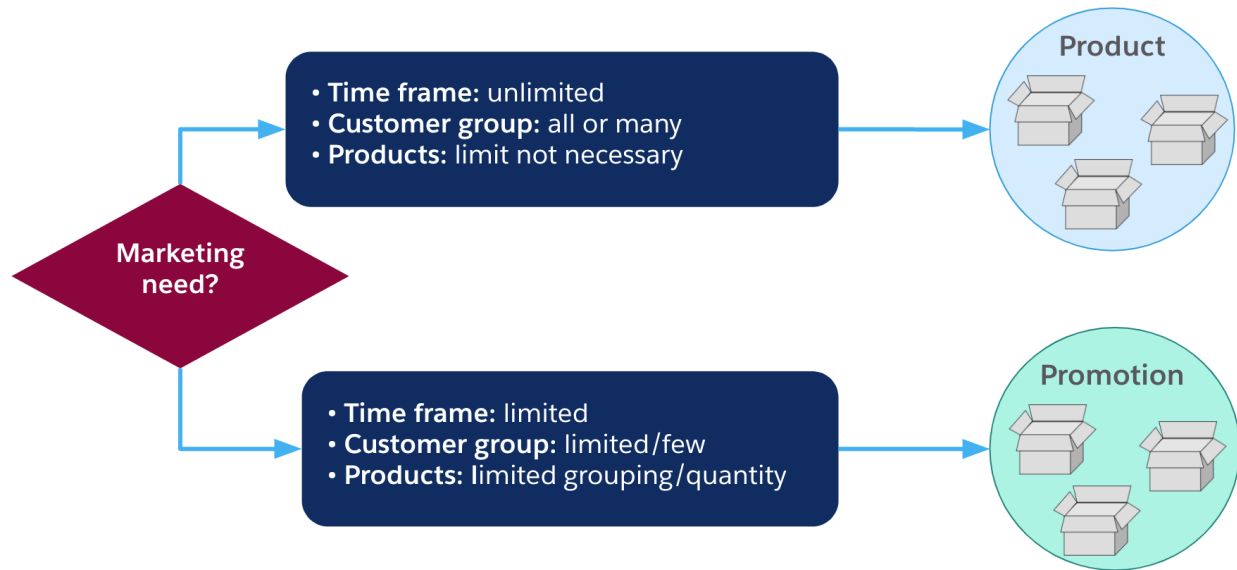
Promotions:

Typically, promotions are product bundles with discounts applied to one or more products in the bundle. Promotions are designed to provide incentives to customers and are designed for:

- A limited time
- A limited customer group
- A limited subset of products



Still not sure? Use this chart to decide when to use a product and when to use a promotion.



What's in a Promotion?

Promotions can be created from a single product or product bundle, or they can consist of multiple products and bundles. You may have seen commercials where promotions are offered with a special redeemable code, and these can also be applied to your promotions in Industries CPQ. Industries Promotions separate the redeemable code from the actual internal identifier your company uses for the promotion, so the promotion can be reused with a different redeemable code at a later date.

A Scenario

Let's apply what you've learned so far to a scenario. The Marketing Manager has made some notes about a promotion Infiwave will run for new subscribers over the next six months.

Target: New subscribers

Retention: Retain for at least 2 years - so a 2 year minimum contract

*Pricing: Infiwave Phone 10 20% off the purchase price, data plan
\$20 per month for 6 months*

Quantity: 1 promotion per customer account

*Time frame: Available from release date of the Infiwave Phone 10
until 6 months after the release date*

Advertisement Redemption Code: 2FOR20

Decide which Products to Use

There is already a product bundle called the Infiwave Phone 10 Intro Bundle in the catalog. This bundle has a data plan and unlimited talk and text. The Infiwave Phone 10 Intro Promotion is created and the existing Infiwave Phone 10 Intro Bundle is added to the promotion.

Set Promotion Availability

You can set the effectivity dates of the promotion to determine when the promotion is available to customers. You can also create a promotion that does not expire. It's common to associate context rules with promotions, so the promotion is limited to a target market segment. In the scenario, this is customers with an account status of "New".

Price the Promotion

When a promotion is created, it is associated with a price list - so it's only available to the cart that has that price list selected. When you create a promotion, you can change the

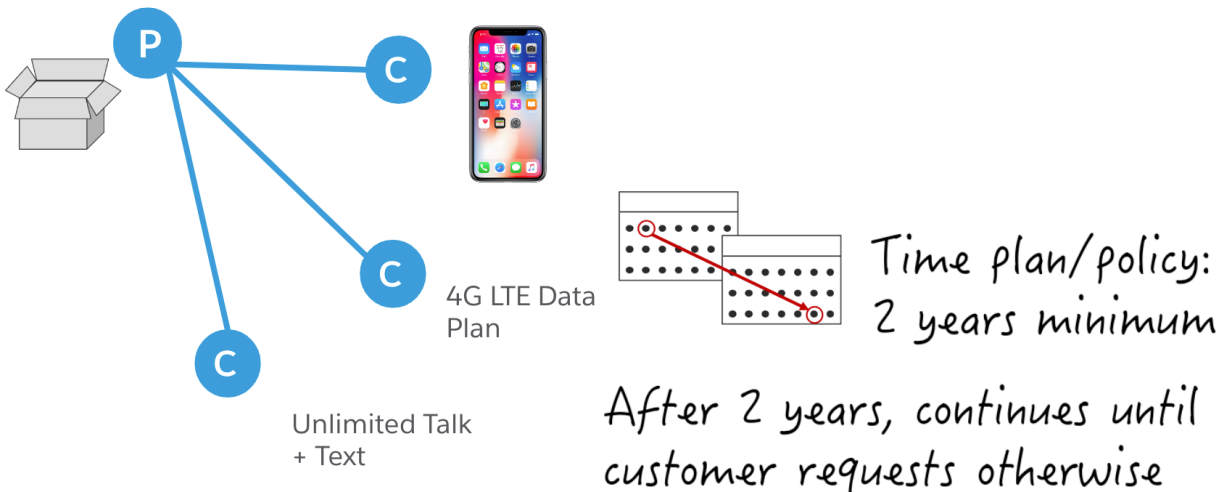
price of a child product in the bundle by adjusting it with a percentage or monetary amount discount, or overriding the price completely.

Configure Subscription Length and Requirements

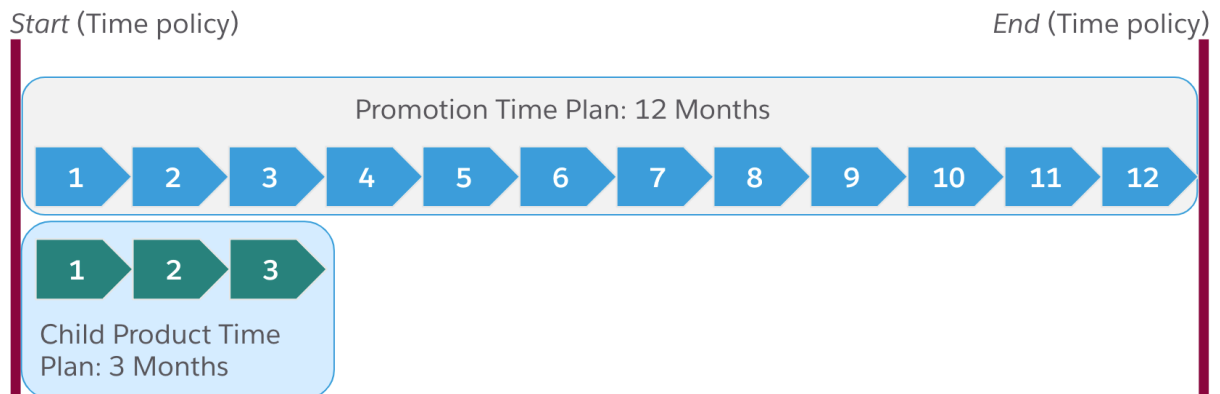
It wouldn't be great business if you assigned promotional prices on your products that were effective forever. Therefore, it's common to set the length of time on a promotion using a subscription time plan. You can also assign a time policy to determine when the subscription begins and ends. Additionally, you can set these options to determine what happens after the end of a promotion:

- **Not Applicable:** At the end of the promotional period, service continues until the customer orders a change. The service will continue at the regular price.
- **Manual Opt-In:** At the end of the promotional period, service ends unless the customer explicitly continues the promotional service at the regular price.
- **Manual Opt-Out:** At the end of the promotional period, service continues at the regular price for the service until the customer explicitly ends the service.

Promotion



After creating a promotion, you can determine how long the discounts on a child product will last. You do this by assigning an additional time plan to the child product. For example, in the above scenario, the data plan is reduced to \$20 per month for 6 months as part of the promotion.



Note that if a time plan is not specified for the child products of the promotion, they inherit the time plan and time policy of the promotion.

However, as shown in the example above, if a time plan is specified for the child product, it overrides the promotion's time plan for that product.

Scenario

Ada, the Pricing Manager at Infiwave, has a busy day ahead of her.



She has been tasked with designing and implementing some promotions and discounts to build a new customer base, and to encourage existing customers to buy more. However, before Ada starts designing the promotions, she wants to understand how promotions are built and how they work. She asks you to guide her through the different types of promotions and how they are created in the shared catalog.

Goal

- Explain the difference between a product and a promotion
- Differentiate between a pricing adjustment and a pricing override
- Demonstrate how promotions can be used to adjust prices and change the time plan of child products
- Differentiate between the promotion code and the redeemable code

Tasks

1. Apply and delete promotions in the cart
2. Explore the configuration of promotions and their products
3. Use the Product Designer to review adjustments and overrides made on a product

Time: 15 mins

Task 1: Apply promotions in the cart

You decide the best place to start is to show Ada how promotions work in the cart. You create an order, apply a promotion, then show Ada how the promotion is displayed. Once she's confident she understands the impacts of applying a promotion in the cart, you delete the promotion to show how this affects existing products in the cart.

Instructions

1. Create a new order for Carole White.
 - a. Use the **App Launcher** to locate and launch **Industries CPQ**.
 - b. From the Industries CPQ navigation menu, select **Orders**.
 - c. From the Orders list header, click **New** to create a new order.
 - d. Add these details to the new order.

Field	Value
Order Name	Carole White - Student Promo
Account Name	White, Carole
Price List	B2C Price List
Order Start Date	[today's date]

-
- e. Click **Save** to save your new order record and continue to the order cart.



2. Add the **Infiwave Phone 10 Intro** promotion to the cart.
 - a. In the **Cart** workspace of the order, click **+ Add Products**.
 - b. In the **Catalog Preview** pane, click **Select Category** then choose **Promotions** to browse the promotions available to Carole White.
 - c. Browse and locate the **Infiwave Phone 10 Intro Promo**, then click **See Details**. Information about what’s included in the promotion, when it starts, and its associated redeemable code, are shown in the PROMOTION details dialog. Click **Add to Cart** to add the promotion to the cart.
 - d. Close the dialog to return to the Cart workspace. Notice the Infiwave Phone 10 Intro Bundle has been added to the cart, and there is a banner above it stating that the Infiwave Phone 10 Intro Promo has been applied. (Refresh your browser if your cart is still showing as empty.) Notice also that the promotion appears in the **Applied Promotions** list in the cart.

3. There are two alerts in the cart relating to the promotion you just added. Expand the Infiwave Phone 10 Intro Bundle to see the issues. It seems there are missing configurations for the Infiwave Phone 10 and the 4G LTE Data Plan. Configure the promotion and its associated child products to remove the alerts.

The screenshot shows the Salesforce Cart workspace. On the left is the 'Catalog Preview' pane with 'B2C Price List' selected and a search bar. Below it is the 'Select Category' button. The main 'Cart (1)' workspace has a warning banner: 'Review 2 alerts in your cart - Click here to review'. Under 'Products in your cart (1)', there is an 'Infiwave Phone 10 Intro Bundle' with a quantity of 1 and a one-time charge of ₹0.00. Below the bundle are three items: 'Unlimited Talk + Text' (one-time charge ₹14.99), 'Infiwave Phone 10' (one-time charge ₹799.99, recurring charge ₹0.00), and '4G LTE Data Plan' (one-time charge ₹0.00, recurring charge ₹20.00). A 'Configure' button is highlighted in the 'Unlimited Talk + Text' row's menu.



- a. From the **Infiwave Phone 10 Intro Bundle** line item action menu, select **Configure**, and select these configuration details for the products.

Product	Field	Value
Infiwave Phone 10	Color	Silver
4G LTE Data Plan	Data Plans	10 GB

- b. The alert messages in the configuration dialog should now have disappeared. Close the configuration dialog to return to the cart.

- 4. Notice the Infiwave Phone 10 and 4G LTE Data Plan both show amended pricing. The new price is displayed and the old price is shown struck through beneath. Let's take a closer look at what's caused these price changes.

Cart (1) [+ Add Products](#)

Infiwave Phone 10 Intro Promo Applied

Item	Quantity	One Time Charge	Recurring Charge
<input type="checkbox"/> Infiwave Phone 10 Intro Bundle v1 Add	1	\$0.00	\$0.00
Infiwave Phone 10 Intro Promo Applied			
Unlimited Talk + Text v1 Add	1	\$0.00	\$14.99
Infiwave Phone 10 Intro Promo Applied			
Infiwave Phone 10 v1 Add	1	\$799.99 \$999.99	\$0.00
Infiwave Phone 10 Intro Promo Applied			
4G LTE Data Plan v1 Add	1	\$0.00	\$20.00 \$34.99

- a. From the **Infiwave Phone 10** line item action menu, select **Adjust Price**. You're taken to the Infiwave Phone 10 Pricing dialog.
- b. Click the **One Time** button in the pricing dialog header. Notice in the Price Waterfall, the base price is shown as discounted by 20% when purchased with the Infiwave Phone 10 Intro Promo.
- c. Close the Infiwave Phone 10 Pricing dialog to return to the cart.

- d. From the **4G LTE Data Plan** line item action menu, select **Adjust Price**. You're taken to the 4G LTE Data Plan Pricing dialog.
- e. Click the **Recurring** button in the pricing dialog header. Notice in the Price Waterfall, the base price is shown as reduced to \$20 per month for 6 months when purchased with the Infiwave Phone 10 Intro Promo.

4G LTE Data Plan Pricing

One TimeRecurringUsage

\$ Price Waterfall

Base Price	\$34.99
\$20 monthly for 6 months when purchased with the Infiwave Phone 10 Intro Promo	(+\$20.00) \$20.00
<hr/>	
Amount to be paid	\$20.00

Adjust Pricing

Adjust By

Discount (-) Upcharge (+)

* Amount

Limit Adjustment Time

+ Add

- f. Close the Infiwave Phone 10 Pricing dialog to return to the cart.
5. Delete the promotion from the cart.
 - a. Expand the **Applied Promotions** list in the cart. You'll see the Infiwave Phone 10 Intro Promo is listed.
 - b. From the **Infiwave Phone 10 Intro Promo** action menu, select **Delete**. The promotion and all associated line items are deleted from the cart.

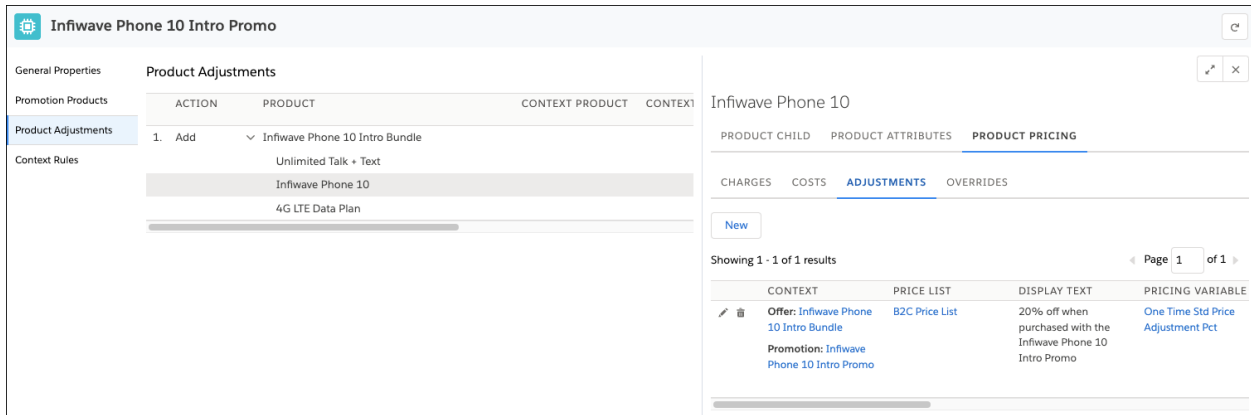
Task 2: Explore the configuration of promotions and their products

Ada's confident she understands how the promotions appear in the cart, but she wants to see how the promotions are configured. You give her a quick tour of promotion configuration using the Vlocity Product Console.

Instructions

1. Open the **Infiwave Phone 10 Intro Promo** promotion in the Vlocity Product Console.
 - a. Use the **App Launcher** to locate and launch the **Vlocity Product Console**.
 - b. On the Vlocity Product Console Dashboard, in the **Product Management** section, click the **search** icon beside **Promotion**.
 - c. In the **Search Promotion...** field, type `Infiwave Phone 10` and click the **search** icon .
 - d. Click the **Infiwave Phone 10 Intro Promo** to open it.
2. Review the details of the promotion.
 - a. In the **General Properties** facet, notice these settings:
 - i. How long the customer must commit to the promotion (Commitment Duration Time Plan)
 - ii. When the commitment starts and how it ends (Commitment Duration Time Policy)
 - iii. What happens once the commitment period is over (Service Continuation)
 - iv. Is a follow-on promotion applied?
 - b. Click the **Promotion Products** facet and note the product to which the promotion was applied. How many of these promotions is the customer allowed to purchase?

- c. Review the information contained in the **Product Adjustments** facet.
 - i. In the **Product Adjustments** facet, expand the **Infiwave Phone 10 Intro Bundle** by clicking the **expand arrow** > next to it.
 - ii. Click the child product **Infiwave Phone 10** and explore the details that display in the **Infiwave Phone 10** pane on the right.



ACTION	PRODUCT	CONTEXT PRODUCT	CONTEXT
1. Add	Infiwave Phone 10 Intro Bundle		
	Unlimited Talk + Text		
	Infiwave Phone 10		
	4G LTE Data Plan		

CONTEXT	PRICE LIST	DISPLAY TEXT	PRICING VARIABLE
Offer: Infiwave Phone 10 Intro Bundle Promotion: Infiwave Phone 10 Intro Promo	B2C Price List	20% off when purchased with the Infiwave Phone 10 Intro Promo	One Time Std Price Adjustment Pct

- iii. Click the **PRODUCT PRICING** tab in the right-hand panel. On the **ADJUSTMENTS** subtab below the **PRODUCT PRICING** tab, see how the pricing has been adjusted by 20% when the product is purchased with the promotion. Notice also that display text is the same as the text shown in the **See Details** window you accessed while in the cart.
- d. From the information provided in the **PRODUCT PRICING** tab for the Infiwave Phone 10, answer these questions:
 - What is the one-time standard price of the Infiwave Phone 10 in the B2C Price List?
 - How was the price of the Infiwave Phone 10 changed for the promotion?
- e. In the Infiwave Phone 10 Intro Promo **Product Adjustments** list, select the **4G LTE Data Plan**. Explore the 4G LTE Data Plan pane that displays on the right to answer the following questions:
 - i. What is the monthly recurring price override for the data plan?
 - ii. What information about the pricing override is displayed to the customer?

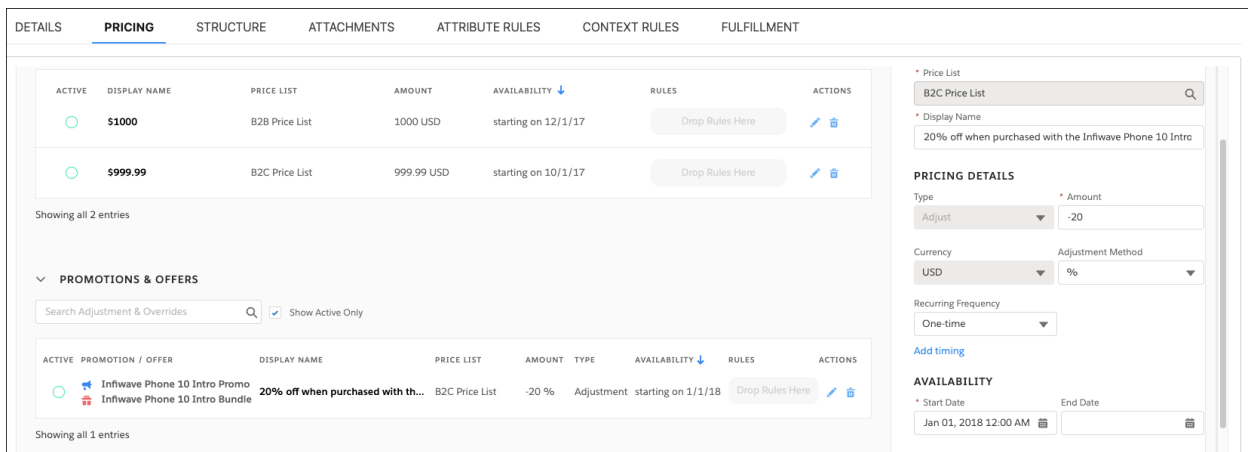
- iii. What is the time plan for this product and why is it different from the time plan for the promotion?
 - iv. What is the difference between the pricing changes for the Infiwave Phone 10 and the 4G LTE Data Plan in this promotion?
- f. Click **X** to close the 4G LTE Data Plan configuration pane.
- g. Close the **Infiwave Phone 10 Intro Promo** tab and the **Search Promotion** tab to return to the Vlocity Product Console **Dashboard**.

Task 3: Use the Product Designer to review adjustments and overrides

Ada wonders how you can review which promotions have been applied to a specific product, so you take a few minutes to show her the PROMOTIONS & OFFERS section of the product in the Product Designer.

Instructions

1. Open the Infiwave Phone 10 product in the Vlocity Product Designer.
 - a. Use the **App Launcher** to locate and launch the **Vlocity Product Designer**.
 - b. From the Vlocity Product Designer navigation menu, select **Products**.
 - c. From the Products **All Products** list view, locate and open the **Infiwave Phone 10** product.
2. Review the promotions and offers applied to the product.
 - a. From the Infiwave Phone 10 product **PRICING** workspace, expand the **PROMOTIONS & OFFERS** list.



ACTIVE	DISPLAY NAME	PRICE LIST	AMOUNT	AVAILABILITY	RULES	ACTIONS
<input type="radio"/>	\$1000	B2B Price List	1000 USD	starting on 12/1/17	Drop Rules Here	Edit Delete
<input type="radio"/>	\$999.99	B2B Price List	999.99 USD	starting on 10/1/17	Drop Rules Here	Edit Delete

Showing all 2 entries

PROMOTIONS & OFFERS

Search Adjustment & Overrides Show Active Only

ACTIVE	PROMOTION / OFFER	DISPLAY NAME	PRICE LIST	AMOUNT	TYPE	AVAILABILITY	RULES	ACTIONS
<input type="radio"/>	Infiwave Phone 10 Intro Promo	20% off when purchased with th...	B2C Price List	-20 %	Adjustment	starting on 1/1/18	Drop Rules Here	Edit Delete
<input type="radio"/>	Infiwave Phone 10 Intro Bundle							

Showing all 1 entries

PRICING DETAILS

Type: Adjust * Amount: -20

Currency: USD Adjustment Method: %

Recurring Frequency: One-time

[Add timing](#)

AVAILABILITY

* Start Date: Jan 01, 2018 12:00 AM End Date:

- b. Notice in the example shown here, the list indicates that the Infiwave Phone 10 is included in the Infiwave Phone 10 Intro Promo as part of the Infiwave Phone 10 Intro Bundle.

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- c. Click the **edit** icon to the right of the PROMOTIONS & OFFERS list item, and you can see the type of adjustment, frequency, and currency applied to the product as part of the promotion, along with the text that is displayed to the user when reviewing the pricing in the cart. Notice that these details can be edited directly on the product when using the Vlocity Product Designer. However, it is not possible to create new promotions from the product in this way. You're going to do that next using the Vlocity Product Console.
 - d. Close the **Infiwave Phone 10** tab.



Yay! All done!