# Exercise 5-2: Create a Promotion for Students

In this exercise, you create a promotion based on these marketing notes.

> Target: Students wanting "bare essentials" Internet, such as college students
>
> Retention: Retain for at least 1 year
>
> Pricing: DSL 20% off monthly charge for 3 months, free installation
>
> Quantity: 1 promo per customer account
>
> Time frame: Available from July 1 to January 31

> Limiting the promotion to students only requires the use of rules. Context Rules addresses that requirement.

## Decision #1: Establish the Description and Duration

As part of building a promotion, answer these questions:

- **How do you describe the promotion?**
  The promotion description can display in the cart promotion list. It's important to describe clearly what the promotion includes.

- **How long is the subscription commitment?**
  You need this information to set the commitment duration time plan.

- **When does the subscription start and end?**
  This information is important for the time policy.

- **How will the subscription end?**
  Will the subscription end unless the customer chooses to continue the subscription, or will the customer need to cancel for the subscription to end?

- **What is the time frame for child product price reductions?**
  Some child products may require time plans that are separate from and shorter than the commitment duration time plan of the promotion.

| | |
|---|---|
| 1. How do you describe the promotion? | Mobile plan with 20% off mobile streaming for 3 months with 1-year subscription |
| 2. How long is the subscription commitment? | 1 year minimum |
| 3. When does the subscription start/end? | Purchase date, Cycle end |
| 4. How does the subscription end? | Customer cancels |
| 5. What is the time frame for child product price reductions? | Mobile streaming rate reduction is only for three months |

## Decision #2: Decide which products to include

- Decide what bundle or bundles you want to apply the offer to. In this exercise, you use the **Back to School Student Offer**.

- Determine the default, minimum, and maximum cardinality settings for the bundle.

- Determine the cardinality settings for each child product.

## Decision #3: Price the Promotion

Finally, answer these questions:

- What individual products do you want to adjust pricing for?

- Do you want to use an adjustment or override the price?

- How long do you want the lower price to be in effect?

Here's an example.



The bundle's time plan will set the commitment duration of the subscription. However, if you have a child product with a discounted price for a limited time, you set the time plan to limit the amount of time allowed for the discounted price.

## Use a Worksheet

You may find it helpful to use a worksheet when building a promotion. These worksheets are used to determine the promotion settings for this exercise.

| Name | Student Internet Promotion |
|---|---|
| Description | 20% off DSL for 3 months plus free installation with a 1 year subscription |
| Length | 1 year |
| Start / End | Day of purchase, cycle end date |
| Subscription ends when | Customer asks for cancellation |
| Bundle to use | Back to School Student Offer |
| Min/Default/Max of bundle | 1 / 1 / 1 |
| Effective from | July 1 |
| Effective to | January 31 |

| Individual Product | Price Adjust | Time frame |
|---|---|---|
| DSL Service | 20% off monthly | 3 months |
| Installation | Free override | N/A |
| Home Hub Modem | None | N/A |
| Backpack | None | N/A |

## Scenario

Ada's next task is to create a promotion to encourage new subscribers to join. She has noticed a basic internet package is popular around the time students are returning to college. She wants to use this bundle for a promotion that will be offered during the months of fall and spring semester enrollment.

## Goals

- Build a promotion and apply it to an existing product
- Demonstrate the ways to adjust pricing of a child product
- Change the time plan of a child product, and explain why you would make the time plan of a child product different from that of the parent promotion

## Tasks

1. Create a promotion
2. Apply the promotion to a product
3. Adjust the price of a child product and limit it to a time frame
4. Override the price of a child product
5. Test the promotion

## Time: 10 mins

## Task 1: Create a promotion

Ada has designed the Student Internet Promotion and has asked you to create it in the shared catalog.

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Instructions

1. If you don't already have the Vlocity Product Console open, use the **App Launcher** to locate and launch the **Vlocity Product Console**.

2. In the Vlocity Product Console's tab navigation bar, ensure the **Infiwave Phone 10 Intro Promo** and **Search Promotion** tabs are closed.

3. In the **Dashboard**, to the right of **Promotion**, click the **new (+)** icon.

4. In the **New Promotion** tab, add these details.

| Field | Value |
|---|---|
| Name | `Student Internet Promotion` |
| Code | `PROMO-STUDENTINTERNET` |
| Description | `20% off DSL for 3 months plus free installation with a 1-year subscription` |
| Price List | **B2C Price List** |
| Commitment Duration Time Plan | **TP-12M** |
| Commitment Duration Time Policy | **TPOL-PURCHASEDATE** |
| Orderable | ✔ |
| Service Continuation | **Manual Opt-Out** |
| Active | ✔ |
| Effective From | **[Today's date]** |

5. Click **Save**.

## Task 2:  Apply the promotion to a product

Next, you apply the Back to School Student Offer to the promotion. You ensure that the product is added to the cart when the promotion is selected.

## Instructions

1. With the promotion still open, select the **Promotion Products** facet and click **New Promotion Product**.

2. Enter the settings to indicate:

   - Which bundle you want to apply the promotion to
   - The cardinality settings for the entire bundle

| Field | Value | Notes |
|---|---|---|
| Action Type | **Add** | This adds the products of the promotion to the cart. |
| Product | **Back to School Student Offer** | |
| Minimum Quantity | 1 | The minimum amount of the bundle that must be purchased. |
| Quantity (Default) | 1 | The default quantity of the bundle. |
| Maximum Quantity | 1 | The maximum number of this bundle that can be purchased. |
| Active | ✔ | Must be selected for the promotion to show in the cart PROMOTIONS list. |
| Effective From | **[Today's date]** | Must be selected for the promotion to show in the cart PROMOTIONS list. |

General Properties

| | |
|---|---|
| * Action Type | Add |
| * Product | Back to School Student |
| Description | |
| Is Undoable | ☐ |
| Undoable Message | |
| Cardinality Check Scope | |
| Update Scope | |

Selection Criteria

| | |
|---|---|
| Parent Offer Product | |
| Selection Context Product | |
| Selection Context Rule | |

Cardinality

| | |
|---|---|
| * Minimum Quantity | 1 |
| * Quantity | 1 |
| * Maximum Quantity | 1 |

Effectivity

| | |
|---|---|
| Active | ✔ |
| Effective From | 2/9/2021 | 12:00 AM |
| Effective Until | | |

Cancel    Save

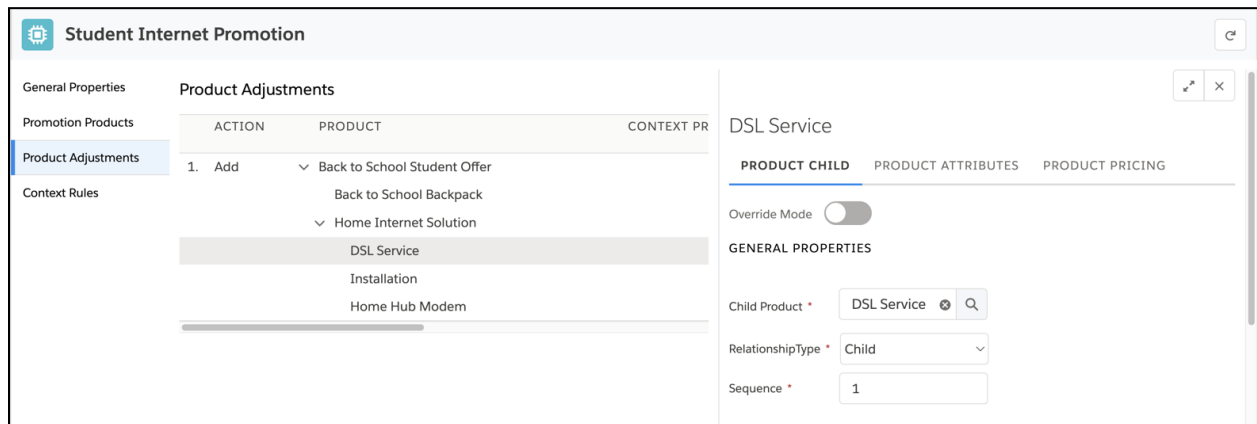3.  Click **Save**. The product displays in the **Promotion Products** list.

## Task 3: Adjust the price of a child product and limit it to a time frame

Ada has asked that the DSL Service, which is a child product of the Back to School Student Offer, is discounted by 20% for the first 3 months after the promotion is purchased.

| Individual Product | Price Adjust | Time frame |
|---|---|---|
| DSL Service | 20% off monthly | 3 months |
| Installation | Free override | N/A |
| Home Hub Modem | None | N/A |
| Backpack | None | N/A |

## Instructions

1.  Open the DSL Service child product of the promotion for configuration.

    a.  Click the **Product Adjustments** facet.

    b.  In the PRODUCT column, expand ( > ) **Back to School Student Offer** and **Home Internet Solution**.
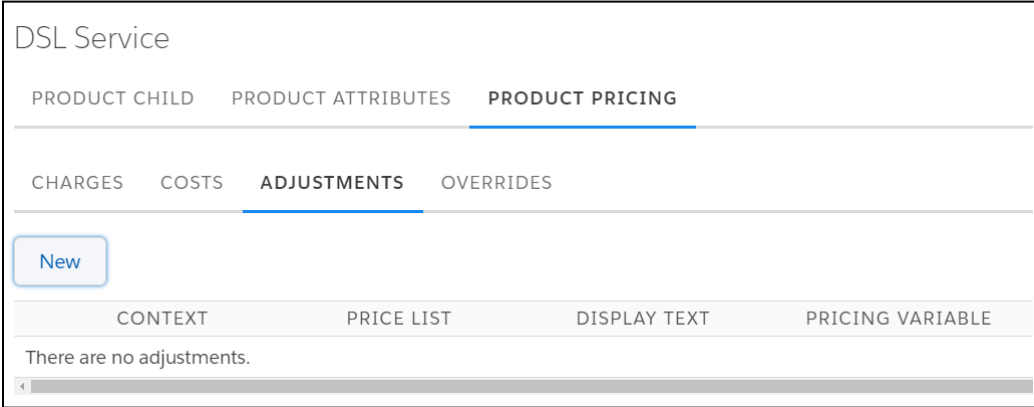


    c.  Click **DSL Service** to open the configuration window.

2.  Now you'll discount the base price of **DSL service** by 20% and limit the discount to occur for three months.

    a.  In the configuration window, click the **PRODUCT PRICING** tab. Notice that below the **CHARGES** subtab, the list of base prices assigned to the **DSL Service** displays.

b. Click the **ADJUSTMENTS** subtab.

DSL Service

PRODUCT CHILD     PRODUCT ATTRIBUTES     **PRODUCT PRICING**

CHARGES     COSTS     **ADJUSTMENTS**     OVERRIDES

New

| CONTEXT | PRICE LIST | DISPLAY TEXT | PRICING VARIABLE |
|---|---|---|---|
There are no adjustments.

c. Click **New,** and in the **Price List Entry** window, complete the **General Properties** section.

| Field | Value |
|---|---|
| Price List | **B2C Price List** |
| Display Text | `20% off monthly charge for 3 months with purchase of Student Internet Promotion` |

d. In the **Pricing Variable** section, search for the type of pricing you want by completing these settings and clicking **Search**:

| Field | Value |
|---|---|
| Charge Type | **Adjustment** |
| Sub-Type | **Standard** |

e. In the **Pricing Variable** section below **Search**, click **Recurring Monthly Std Price Adjustment Pct**.

Pricing Variable

Charge Type *    Adjustment

Sub-Type *    Standard

Search

**Selected Pricing Variable:** Recurring Monthly Std Price Adjustment Pct

f.  In the **Pricing Element** section, click **20% Off Monthly**.

g.  In the **Time Plan/Policy** section, indicate the discount is applied for three months of the subscription by entering this setting:

| Field | Value |
| --- | --- |
| Time Plan | **TP-3M** |

h.  Complete the **Effectivity** section and click **Save**.

| Field | Value |
| --- | --- |
| Effective From | **[Today's date]** |
| Active | ✔ |

i.  Close the panel by clicking the **X**.

DSL Service

PRODUCT CHILD    PRODUCT ATTRIBUTES    **PRODUCT PRICING**

CHARGES    COSTS    **ADJUSTMENTS**    OVERRIDES

New

Showing 1 - 1 of 1 results                                                  Page  1  of 1

| CONTEXT | PRICE LIST | DISPLAY TEXT | PRICING VARIABLE | PRICING ELEMENT | | TIME PLAN |
|---|---|---|---|---|---|---|
| **Offer:** Back to School Student Offer<br><br>**Promotion:** Student Internet Promotion | B2C Price List | 20% off monthly charge for 3 months with purchase of Student Internet Promotion | Recurring Monthly Std Price Adjustment Pct | Name: 20% Off Monthly<br>Code: M-ADJ-20%-OFF<br>Display Text: 20% Off Monthly<br>Calculation Type: Simple<br>Adjustment: -20 % | | TP-3M |

## Task 4: Override the price of a child product

Ada's completed the price adjustment. Now she wants to override the price of the Installation in the Home Internet Solution child product, to ensure it's free as part of the promotion.

| Individual Product | Price Adjust | Time frame |
|---|---|---|
| DSL Service | 20% off monthly | 3 months |
| Installation | Free override | N/A |
| Home Hub Modem | None | N/A |
| Backpack | None | N/A |

## Instructions

1. Within the **Product Adjustments** facet, click the child product **Installation** to open the right-hand panel.

2. Select the **PRODUCT PRICING** tab.

3. In the **OVERRIDES** sub tab click **New** to create a new price override.

4. In the **Price List Entry** window, complete the **General Properties** section.

| Field | Value |
|---|---|
| Price List | **B2C Price List** |
| Display Text | `Free with purchase of Student Internet Promotion` |

5. Select the Pricing Variable and Pricing Element.
   a. In the **Pricing Variable** section, search for the type of pricing you want by completing these settings and clicking **Search**:

   | Field | Value |
   |---|---|
   | Charge Type | **One-time** |
   | Sub-Type | **Standard** |

   b. In the **Pricing Variable** section below **Search**, click **One Time Std Price**.

    c.  In the **Pricing Element** section, click **FREE**.

6.  Complete the **Effectivity** section and click **Save**.

| Field | Value |
| --- | --- |
| Effective From | **[Today's date]** |
| Active | ✔ |

The new override displays in the list of overrides for Installation.

Installation

PRODUCT CHILD   PRODUCT ATTRIBUTES   **PRODUCT PRICING**

CHARGES   COSTS   ADJUSTMENTS   **OVERRIDES**

New

Showing 1 - 1 of 1 results    Page 1 of 1

| CONTEXT | PRICE LIST | DISPLAY TEXT | PRICING VARIABLE | PRICING ELEMENT | TIME PL |
| --- | --- | --- | --- | --- | --- |
| **Offer:** Back to School Student Offer  **Promotion:** Student Internet Promotion | B2C Price List | Free with purchase of Student Internet Promotion | One Time Std Price | Name: FREE  Code: OT-FREE  Display Text: $0  Calculation Type: Simple  Charge: 0 USD | |

7.  Close the right-hand panel by clicking the **X** in the upper right-hand corner.

## Task 5:  Test the promotion

To make sure everything is working as it should, Ada tests the promotion in the cart using the order she created in Exercise 5-1.

## Instructions

1.  Add the **Student Internet Promotion** to the order cart.

    a.  If you don't already have the order open, use the **App Launcher** to locate and launch **Industries CPQ**. From the Industries CPQ navigation menu, select **Orders**. From the Orders list, locate and open the **Carole White - Student Promo** order.
    b.  Refresh your browser to ensure you'll be looking at the latest promotions list in the catalog.
    c.  From the **Cart** workspace, select **+ Add Products** to open the Catalog Preview.
    d.  In the Catalog Preview **Search** bar, type `student` and from the smart search results list pick **In Promotions - student**. The Student Internet Promotion you created earlier appears in the search results.
    e.  On the **Student Internet Promotion** tile, click **Add to Cart**.

2.  There are two alerts in the cart. To fix the alerts, from the Back to School Student Offer line item action menu, select **Configure**. In the configuration dialog, expand the Home Internet Solution product and make the following changes.

| Product | Field | Value |
| --- | --- | --- |
| DSL Service | Download Speed | **20 Mbps** |
| Home Hub Modem | Grade | **Better** |

3.  Close the Configuration dialog.

4. View the pricing changes to the child products.



a. From the **DSL Service** line item action menu, select **Adjust Price**.

b. In the **DSL Service Pricing** dialog, click the **Recurring** button to view the recurring price details.

c. Notice the new price is displayed in the Price Waterfall, along with the text you entered when you adjusted the base price of DSL service.



d. Close the **DSL Service Pricing** dialog.

e. Repeat steps a to d, but this time view the **One Time** charge for the **Installation** before closing the Pricing dialog.

5. Delete the promotion from the cart.

a. Expand the **Applied Promotions** list in the Cart workspace. There is one applied promotion shown.

b. From the action menu for the **Student Internet Promotion**, select **Delete**.

c. The promotion, and all its associated child products, are removed from the cart.

**Yay! All done!**