

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 5-6: Create Order-Based Discounts

An order-based discount is defined as a one-time discount that is applied at the time of purchase. You can identify, create and apply an order-based discount against a specific product, a collection of products (sales catalogs or categories) or all items in the cart. The reduction in price can be specified using a percentage (10% off) or an absolute value (\$10 off). This is categorized as a contractual type discount because it can be applied against a sales catalog or all items in the cart, whereas transactional discounts (promotions) cannot.

This type of discount is useful during a conversation between a customer service representative (CSR) and a customer during an active sales order to incentivize the customer's behavior to purchase additional products and/or services. Could a CSR manually adjust the price of each product in the cart to incentivize the customer? Absolutely, but with order-based discounts, the CSR could have several pre-built options to choose from to incentivize the customer and add it to the order. For example, if a customer is considering upgrading their Infiwave Phone 10 today, the CSR could offer a pre-built discount of 20% off all Infiwave Phone accessories (sales catalog) in an attempt to close the sale.

Order-based discounts differ from account-based and contract-based in that they can only be applied once to the product or sales catalog for that instance of the order.

Scenario



Ada has been asked to create an order-based discount in the shared catalog to reduce the price of mobile phone accessories by 20%. A prebuilt discount enables salespeople and CSRs to quickly incentivize a sale at order capture.



Brooks, a CSR at Infiwave, uses the 20% discount Ada has created to incentivise a customer to close a sale - but the customer wants more. Brooks deletes the discount and adds a custom order-based discount of 25%, which applies only to the phone case and protective glass cover. The customer is pleased with the new discount and places the order.

Goals

- Implement an order-based discount
- Apply and review an order-based discount in the cart
- Apply and review a custom order-based discount in the cart
- Apply price adjustments using adjustment codes in the cart

Tasks

1. Create an order-based discount for specific products
2. Apply the discount in the cart then delete it
3. Apply a custom order-based discount in the cart
4. Discount a product price using an adjustment code

Time: 25 mins

Task 1: Create an order-based discount for specific products

Ada has asked you to help her create a discount, selectable from the cart, which offers 20% off all mobile phone accessories.

You discuss the best approach for this, as there are two ways to create a discount. Either you can create a predefined discount using the Product Console, or the sales representatives/CSRs can create custom discounts from the cart.

You decide it would be quicker for the sales team and CSRs if they could select from predefined discounts - so you go ahead and create a discount in the shared catalog.



For discounts to be applied, the PricingPlanService should be set as the active and default implementation for the Pricing Interface (instead of the DefaultPricingImplementation). This has already been configured in your training playground. The step in the Default Pricing Plan that applies discounts is step 35, Apply Context Discounts.

Instructions

1. Create a new discount.
 - a. Navigate to the **Vlocity Product Console**.
 - b. Click the **new** icon (+) to the right of **Discount**.
 - c. Enter the information for the **New Discount**.

Field	Value	Notes
Name	20% Off Mobile Phone Accessories - ODR	Identifies the name of the discount.
Code	DSC_20_PHACC_ODR	All discount codes should be unique.
Description	20% Off Mobile Phone Accessories	Provides a brief description of the discount (optional).
Discount Type	Order	Discounts can be applied to an Order, Account, or a Contract.

Price List	B2C Price List	Select the price list the discount applies to.
Applies to All Items In Cart	Leave unchecked	When checked, the discount will apply to all items in the cart.
Active	<input checked="" type="checkbox"/>	When checked, the discount is activated and displays in the cart for use.
Effective From	[Today's date]	Starting date the discount is available for use.
Effective Until	Leave Blank	The last date the discount is available for use. Once this date has passed, the discount will no longer display as a selectable discount in the cart.

- d. Click **Save**.
2. Specify the items to be discounted.
 - a. Click on the **Discount Items** facet.
 - b. Click **New Discount Item**.
 - c. In the **General Properties** pane, add this information.

Field	Value
Types	Product
Product	Tempered Glass Screen Protector
Active	<input checked="" type="checkbox"/>
Effective From	[Today's date]

- d. Click **Save**.



- e. Repeat steps b-d to add the **Infiwave Ocean Phone Case** and **Infiwave Fast Charge Wireless Charging Stand** as new discount items.

- 3. Define the discount pricing.
 - a. Click on the **Discount Pricing** facet.
 - b. Click the **New** button under the **ADJUSTMENTS** tab.
 - c. Enter the following for the Price List Entry:

Field	Value
Price List	B2C Price List
Display Text	20% Off Mobile Phone Accessories
Charge Type	Adjustment
Sub-Type	Standard
Pricing Variable	One Time Std Price Adjustment Pct
Pricing Element	20% Off
Effective From	[Today's date]
Active	✓

- d. Click **Save**.

Promotions and Discounts

Exercise Guide



20% Off Mobile Phone Accessories - ODR

General Properties Pricing Rules

Discount Items **ADJUSTMENTS**

Discount Pricing [New](#)

Context Rules

Showing 1 - 1 of 1 results

	CONTEXT	PRICE LIST	DISPLAY TEXT	PRICING VARIABLE	PRICING ELEMENT
	Discount: 20% Off Mobile Phone Accessories - ODR	B2C Price List	20% Off Mobile Phone Accessories	One Time Std Price Adjustment Pct	Name: 20% Off Code: ADJ-20%-OFF Display Text: 20% Off Calculation Type: Simple Adjustment: -20 %

Task 2: Apply the discount in the cart then delete it

Brooks, a CSR at Infiwave, uses the 20% discount Ada has created to encourage a potential customer, Carole White, to place her order for a new Infiwave Phone 11. Brooks reviews the price changes in the cart with Carole.

Carole's wavering about the order, and Brooks is keen to hit her sales targets for the month, so Brooks deletes the 20% discount from Carole's order cart and adds a custom order-based discount of 25%, which applies only to the phone case and protective glass cover. Carole is pleased with the new discount and decides to go ahead with the order.

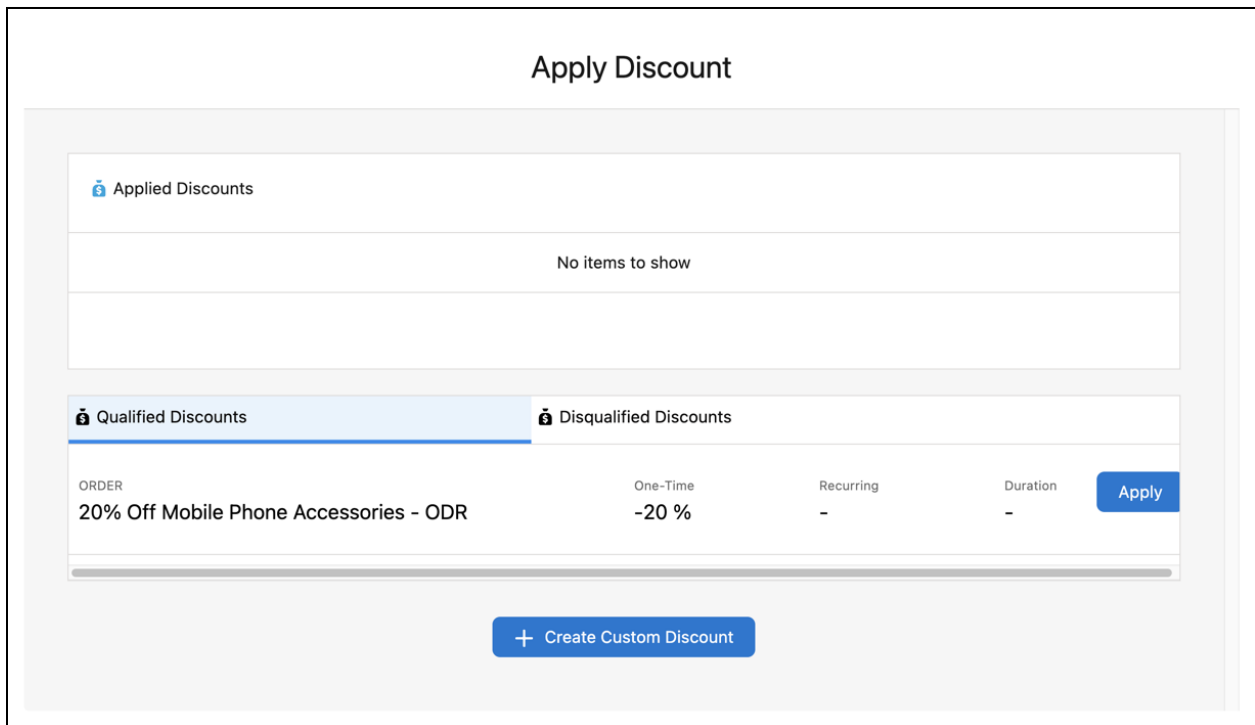
Instructions

1. Create a new order.
 - a. From the **Industries CPQ** navigation menu, select **Orders**.
 - b. From the Orders list view, click **New** to create a new order.
 - c. In the New Order dialog, enter this information.

Field	Value
Order Name	Carole White - Order Based Discount Test
Account Name	White, Carole
Order Start Date	[Today's date]
Price List	B2C Price List

- d. Click **Save**.
2. Add the products to be tested into the order cart.
 - a. In the **Cart** workspace of the order, click **+ Add Products** to open the Catalog Preview.

- b. In the Catalog Preview pane, locate and add these products to the cart:
Infiwave Phone 11, Infiwave Ocean Phone Case, Tempered Glass Screen Protector and **Infiwave Fast Charge Wireless Charging Stand**.
 - c. Configure the **Infiwave Phone 11** to select a **Color** and **Capacity**. This will remove the alerts in the cart.
 3. Add the discount to the cart and review the impacts.
 - a. In the **Applied Discounts** section of the cart, click **+ Add Discount** to open the Apply Discount dialog.
 - b. In the Apply Discount dialog, select the **Qualified Discounts** tab to see the discounts for which the order is eligible. You see the order discount you created earlier.



- c. Click **Apply** beside the order discount to add the discount to the cart. This may take a moment to load. The new discount is displayed in the **Applied Discounts** pane at the top of the Apply Discount dialog.
 - d. Close the Apply Discount dialog to return to the cart.



e. Notice the prices for the **Infiwave Fast Charge Wireless Charging Stand**, **Tempered Glass Screen Protector**, and **Infiwave Ocean Phone Case** have been reduced by 20%.

Products in your cart (4)

Product	Add	Quantity	One Time Charge	Recurring Charge	
<input type="checkbox"/> Infiwave Fast Charge Wireless Charging Stand	Add	1	₹39.99 ₹49.99	₹0.00	⋮
<input type="checkbox"/> Tempered Glass Screen Protector	Add	1	₹31.99 ₹39.99	₹0.00	⋮
<input type="checkbox"/> Infiwave Ocean Phone Case	Add	1	₹27.99 ₹34.99	₹0.00	⋮
<input type="checkbox"/> Infiwave Phone 11	Add	1	₹699.99	₹0.00	⋮

f. Expand the **Applied Discounts** list in the cart. The order-based discount you added is listed there, showing it's a new one-time order-based discount of 20%. The green checkmark to the left of the discount shows that the discount has been approved.

Applied Discounts (1) + Add Discount

Discount	Status	One Time Charge	Recurring Charge	
<input checked="" type="checkbox"/> 20% Off Mobile Phone Accessories - ODR(Order) See Details	New	-20%	-	⋮

- g. On the order discount item, click **See Details**.

20% Off Mobile Phone Accessories - ODR (Order)

✔ APPROVED

20% Off Mobile Phone Accessories

Discount Source	Duration	Discount Code
Order	Months	NA

Category

Products
Tempered Glass Screen Protector
Infiwave Ocean Phone Case
Infiwave Fast Charge Wireless Charging Stand

Here you can see full details of the discount, including the products to which it applies, its duration, and the source of the discount (Order, Account, or Contract). Across the top is a large banner stating that the discount has been approved.

By default, discounts are set to be automatically approved.



If your business requires you to request approval for a discount, you can do so using the Discount Approval button in the cart. The Discount Approval button invokes an OmniScript which calls the Integration Procedure (VIP), CPQ/Submit Discounts for Approval.

- h. Close the Discount Details dialog to return to the cart.
4. Delete the discount.
- a. In the **Applied Discounts** list, from the **20% Off Mobile Phone Accessories - ODR (Order)** discount action menu, select **Delete**.
 - b. The discount no longer features in the Applied Discounts list and the prices have been returned to their original state.

Task 3: Apply a custom order-based discount in the cart

Brooks, a CSR at Infiwave, has tried to use the 20% discount Ada created to incentivise a customer to close a sale - but the customer wants more. Brooks has deleted the discount and now adds a custom order-based discount of 25%, which applies only to the phone case and protective glass cover. The customer is pleased with the new discount and places the order.



What would happen if Brooks didn't delete the original discount? Both discounts would be applied. The first discount would reduce the price by 20%. The second discount would be applied to the newly discounted price - effectively creating a compound discount greater than 45%.

Instructions

1. If you don't already have it open, from **Industries CPQ**, open the **Carole White - Order Based Discount Test** order and go to the **Cart** workspace of the order.
2. Scroll to the bottom of the cart and click **+ Add Discount** to add a new discount.



In your order header, you'll see there is an **Apply Discount** button. This performs the same task as the **+ Add Discount** in the Applied Discounts list.

3. In the **Apply Discount** dialog, check there are no discounts showing in the **Applied Discounts** list at the top of the dialog. If there are, return to Task 2, Step 4.

4. Click + **Create Custom Discount** then complete the **Create Custom Discount** information.

Field	Value
Name	25% off phone case and protective cover
Allocation	Order
Description	25% off Ocean phone case and tempered glass cover for this order
Apply to	Specific Products
Product	Infiwave Ocean Phone Case Tempered Glass Screen Protector
One Time	<input checked="" type="checkbox"/>
Adjust By	Percent
Value	25

Note that you could choose to apply the discount to the whole cart, or to specific products. Because you selected **Specific Products**, you then specified which Category the specified products fit into (for example, all accessories, or all subscription plans) or the specific products you want to include. In this example, you allocated the discount to two products: the Infiwave Ocean Phone Case and the Tempered Glass Screen Protector.

Create Custom Discount

Name
25% off phone case and protective cover

Allocation
Order

Description
25% off Ocean phone case and tempered glass cover for this order

Apply to

Category
Search

Product
Infiwave Ocean Phone Case X
Tempered Glass Screen Protector X

Amount
Set the amount of discount to be applied.

One Time

Recurring

Adjust By
Percent

Value
% 25

5. Click **Save & Apply** to save your custom discount and apply it to the order.



Apply Discount

Applied Discounts

ORDER	Approval	One-Time	Recurring	Duration	✕
25% off phone case and protective cover	✔	-25 %	-	-	

- 6. The custom discount appears in the **Applied Discounts** list at the top of the Apply Discount dialog. Close the Apply Discount dialog to return to the cart.
- 7. Check the prices of the **Tempered Glass Screen Protector** and **Infiwave Ocean Phone Case**. Both have been discounted by 25%.
- 8. From the **Tempered Glass Screen Protector** line item action menu, select **Adjust Price**. The discount is shown in the **One Time Price Waterfall**, with the name of the discount displayed.

Tempered Glass Screen Protector Pricing

One Time Recurring Usage

Price Waterfall

Base Price	\$39.99
25% off phone case and protective cover	(-25%) \$29.99
<hr/>	
Amount to be paid	\$29.99

- 9. Close the **Tempered Glass Screen Protector Pricing** dialog to return to the cart.

Task 4: Discount a product price using an adjustment code

Brooks is happy that Carole decided to place her order. But Brooks did have one more trick up his sleeve if Carole needed further encouragement: a price adjustment on the Infiwave Phone 11.

Instructions

1. Go to the **Cart** workspace of the **Carole White - Order Based Discount Test** order, and from the **Infiwave Phone 11** line item action menu, select **Adjust Price**.
2. On the Infiwave Phone 11 Pricing dialog, in the **Adjust Pricing** section, select the adjustment using these details.

Field	Value
Adjust By	Adjustment Code
Adjustment Code	ADJ-\$20-OFF

3. Click **+ Add** to add your \$20 off price adjustment to the Infiwave Phone 11. The price adjustment is displayed in the Price Waterfall.

Infiwave Phone 11 Pricing

One Time **Recurring** Usage

Price Waterfall

Base Price	\$699.99
Discount ADJ-\$20-OFF applied by Eliza Young	(-\$20.00) \$679.99
Amount to be paid	\$679.99

4. Close the Infiwave Phone 11 Pricing dialog to return to the cart. Notice that the Infiwave Phone 11 price has been discounted by \$20.



Yay! All done!