
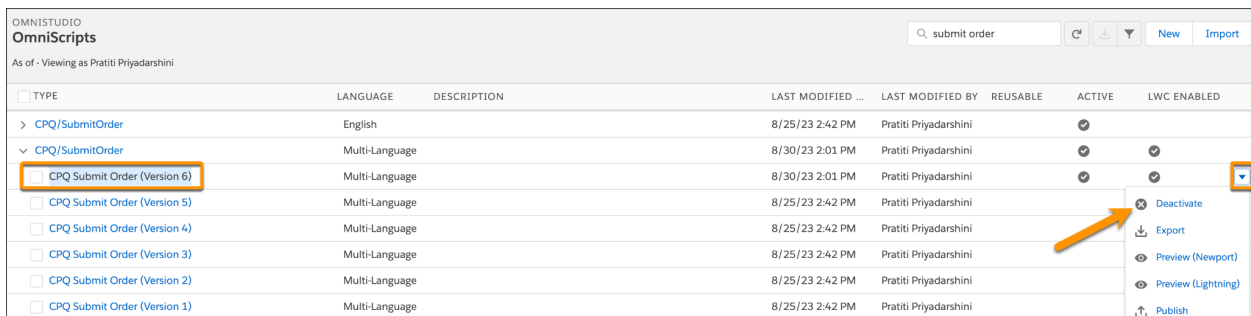


## Before You Start

Sometimes after spinning a new training playground, the **Submit Order** button on your CPQ Cart page might not work as desired. Nothing to worry! To prevent this from happening you just need to reactivate the CPQ Submit Order OmniScript in your playground. Here's how:

1. Using the Lightning App Launcher , search for and select **OmniScripts**.
2. On the OmniScripts page, type **Submit Order** in the search bar.
3. From the search results, click the expand arrow > beside the **CPQ/SubmitOrder Multi-Language** OmniScript.
4. From the CPQ Submit Order (Version 6) OmniScript action menu, click **Deactivate**. Wait till the tick mark under the Active column disappears. This implies that the OmniScript is no longer active.



TYPE	LANGUAGE	DESCRIPTION	LAST MODIFIED ...	LAST MODIFIED BY	REUSABLE	ACTIVE	LWC ENABLED
> CPQ/SubmitOrder	English		8/25/23 2:42 PM	Pratiti Priyadarshini		☑	
∨ CPQ/SubmitOrder	Multi-Language		8/30/23 2:01 PM	Pratiti Priyadarshini		☑	☑
<input type="checkbox"/> CPQ Submit Order (Version 6)	Multi-Language		8/30/23 2:01 PM	Pratiti Priyadarshini		☑	☑
<input type="checkbox"/> CPQ Submit Order (Version 5)	Multi-Language		8/25/23 2:42 PM	Pratiti Priyadarshini			
<input type="checkbox"/> CPQ Submit Order (Version 4)	Multi-Language		8/25/23 2:42 PM	Pratiti Priyadarshini			
<input type="checkbox"/> CPQ Submit Order (Version 3)	Multi-Language		8/25/23 2:42 PM	Pratiti Priyadarshini			
<input type="checkbox"/> CPQ Submit Order (Version 2)	Multi-Language		8/25/23 2:42 PM	Pratiti Priyadarshini			
<input type="checkbox"/> CPQ Submit Order (Version 1)	Multi-Language		8/25/23 2:42 PM	Pratiti Priyadarshini			

5. Again, select the same action menu for the CPQ Submit Order (Version 6) OmniScript and click **Activate**.
6. Click **Ok** to continue. Wait till you see the tick mark under the Active column.

The CPQ Submit Order OmniScript is now active and your Submit Order button on the CPQ Cart page will work as desired.



There are 2 CPQ/SubmitOrder OmniScripts in your training playground. Make sure to reactivate only the CPQ/SubmitOrder Multi-Language OmniScript and not the CPQ/SubmitOrder English one.

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## Exercise 5-7: Create an Account-Based Discount

An account-based discount does everything an order-based discount does; however, these discounts can be saved against an account for future discounting. Account-based discounts allow you to apply a reduction in price to products and services in the future. This means the discount can be applied towards any future purchases made as part of the account until the validity of the discount ends, and it applies to all orders in an account.

Account-based discounts are most relevant during a conversation between a CSR and a customer, especially to retain the business of a loyal customer as part of a loyalty and retention (L&R) program. For example, ABC Company negotiates a 15% discount on all advertising placements over the next year. The negotiated discount is stored in ABC Company's account. Once the discount is activated, on the account, any future orders for ABC Company will automatically receive a 15% discount on advertising placements.

Account-based discounts differ from order-based discounts in that they're not actually activated until the order containing the order-based discount is submitted.

## Scenario



Ada needs your help to create an account-based discount to reduce the price of all products and services by 10% for 12 months. Ada knows that applying this discount to customer accounts will enable future discounting and help the sales and CSR teams to retain customer loyalty.

Later, Eric Bishop, a customer, contacts the Infiwave service center to cancel his mobile phone contract because he's dissatisfied with his cellular coverage. In an attempt to retain the customer, Brooks the CSR offers a 10% discount on everything Eric purchases for the next 12 months.

## Goals

- Explain the purpose of account-based discounts
- Create and configure an account-based discount
- Implement and deactivate an account-based discount for a customer

## Tasks

1. Define an account-based discount
2. Apply the account-based discount in the cart
3. Test and deactivate the account-based discount

**Time:** 20 mins

## Task 1: Define an account-based discount

Ada needs your help to create an account-based discount to reduce the price of all products and services purchased by a customer by 10% for 12 months. Ada knows that applying this discount to customer accounts will enable future discounting and help the sales and CSR teams to retain customer loyalty.

### Instructions

4. Create the account-based discount in the Vlocity Product Console.
  - a. Navigate to the **Vlocity Product Console**.
  - b. In the Product Management section of the Vlocity Product Console, click the **+** to the right of **Discount** to create a new discount.
  - c. Enter the information for the **New Discount**.

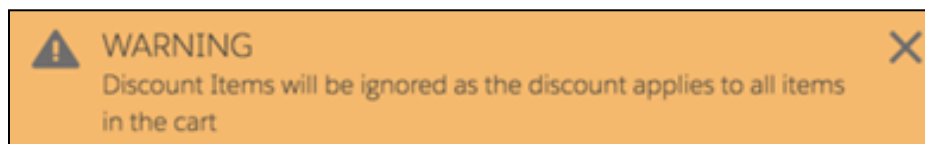
Field	Value	Notes
Name	10% Off Everything 12mo - Acct	Identifies the name of the discount.
Code	DSC_10_12MO_ACCT	All discount codes should be unique.
Description	10% Off Everything for 12 months	Provides a brief description of the discount (optional).
Discount Type	<b>Account</b>	Discounts can be applied to an Order, Account, or a Contract.
Price List	<b>B2C Price List</b>	Select the price list the discount applies to.
Discount Duration	12	Applies to account or contract-based discounts. Determines the number of months which the discount applies. When the discount expires, it becomes unavailable for future sales and orders. If a duration is not specified, the discount will expire when the end date becomes effective. If you do

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		not specify an end date or a duration, the discount will never expire.
Applies to All Items In Cart	✓	When checked, the discount will apply to all items in the cart.
Active	✓	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	Ending date the discount is available for use. Once the ending date has passed, the discount will no longer display as a selectable discount in the cart.

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- d. Click **Save**.
- e. Click on the **Discount Items** facet. You'll see a warning message informing you that any discount items you add will be ignored, as you've configured the discount to apply to all the items in the cart.



5. Define the price list entry for the discount on one-time charges in the B2C Price List.
  - a. Click on the **Discount Pricing** facet.
  - b. On the **ADJUSTMENTS** tab, click **New**.
  - c. In the **Price List Entry** dialog, enter the following information.

Field	Value
Price List	<b>B2C Price List</b>
Display Text	10% Off Everything
Charge Type	<b>Adjustment</b>
Sub-Type	<b>Standard</b>
Pricing Variable	<b>One Time Std Price Adjustment Pct</b>
Pricing Element	<b>10% Off</b>
Effective From	<b>[Today's date]</b>
Active	✓

- d. Click **Save** to save your price list entry.
6. Define the price list entry for the discount on recurring charges in the B2C Price List.
  - a. In the **ADJUSTMENTS** tab of the **Discount Pricing** facet, click the **New** button to create a second price list entry, this time for recurring charges.
  - b. Enter this information for the price list entry. For the **Time Policy**, click the x to delete the **Default Purchase Date Time Policy** and replace it with the time policy indicated.

Field	Value
Price List	<b>B2C Price List</b>
Display Text	10% Off Everything
Charge Type	<b>Adjustment</b>

Sub-Type	Standard
Pricing Variable	Recurring Monthly Std Price Adjustment Pct
Pricing Element	10% Off Monthly
Time Plan	TP-12M
Time Policy	TPOL-PURCHASEDATE-ENDPLAN
Effective From	[Today's date]
Active	✓

c. Click **Save**.

**10% Off Everything 12mo - Acct**

General Properties

ADJUSTMENTS

Discount Items

Discount Pricing New

Context Rules Showing 1 - 2 of 2 results

CONTEXT	PRICE LIST	DISPLAY TEXT	PRICING VARIABLE	PRICING ELEMENT	TIME PLAN	TIME POLICY
Discount: 10% Off Everything 12mo - Acct	B2C Price List	10% Off Everything	One Time Std Price Adjustment Pct	Name: 10% Off Code: ADJ-10%-OFF Display Text: 10% Off Calculation Type: Simple Adjustment: -10 %		
Discount: 10% Off Everything 12mo - Acct	B2C Price List	10% Off Everything	Recurring Monthly Std Price Adjustment Pct	Name: 10% Off Monthly Code: M-ADJ-10%-OFF Display Text: 10% Off Monthly Calculation Type: Simple Adjustment: -10 %	TP-12M	TPOL-PURCHASEDATE-ENDPLAN

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## Task 2: Apply the account-based discount in the cart

Eric Bishop, a customer, contacts the Infiwave service center to cancel his mobile phone contract because he's dissatisfied with his cellular coverage. In an attempt to retain the customer, Brooks the CSR offers a 10% discount on everything Eric purchases for the next 12 months.

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### Instructions

1. Create a new order for Eric Bishop.
  - a. Open Industries CPQ and, from the **Orders** list view, click **New** to create a new order.
  - b. Enter the following information for the **New Order**.

Field	Value
Order Name	Eric Bishop - Account Discount
Account Name	<b>Bishop, Eric</b>
Order Start Date	<b>[Today's date]</b>
Price List	<b>B2C Price List</b>

- c. Click **Save** to save the order and continue to the order cart.
2. From the **Cart** workspace of the order, click **+ Add Products** to open the Catalog Preview.
  3. In the Catalog Preview pane, locate and add the **Infiwave 3 Headphones** and the **Infiwave Fast Charge Wireless Charging Stand** to the cart.
  4. Beside the Applied Discounts list in the cart, select **+ Add Discount**.
  5. Locate the **10% Off Everything 12mo - Acct** discount and click **Apply** to add it to the cart.





- 6. The account-based discount is added to the **Applied Discounts** list in the Apply Discount dialog. Close the Apply Discount dialog to return to the cart.
- 7. Notice all the product prices in the cart have been discounted by 10%, and the account discount is displayed in the Applied Discounts list in the cart.

Products in your cart (2)

<input type="checkbox"/> Infiwave Fast Charge Wireless Charging Stand	Add	Quantity 1	One Time Charge <b>₹44.99</b> <small>₹49.99</small>	Recurring Charge <b>₹0.00</b>	⋮
<input type="checkbox"/> Infiwave Headphones 3	Add	Quantity 1	One Time Charge <b>₹134.99</b> <small>₹149.99</small>	Recurring Charge <b>₹0.00</b>	⋮

> Applied Promotions

Applied Discounts (1) + Add Discount

<input checked="" type="checkbox"/> <b>10% Off Everything 12mo - Acct( Account )</b> <a href="#">See Details</a>	New	One Time <b>-10%</b>	Recurring <b>-10%</b>	⋮
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- 8. Submit the order to activate the account discount.

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## Task 3: Test and deactivate the account-based discount

For your own peace of mind, you decide to check if the new 10% off all products account discount works on any new order for Eric Bishop.

Then you submit an order to deactivate the 10% discount applied to Eric Bishop's account.

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### Instructions

1. Create a new order for Eric Bishop.
  - a. Open Industries CPQ and, from the **Orders** list view, click **New** to create a new order.
  - b. Enter the following information for the **New Order**.

Field	Value
Order Name	Eric Bishop - Account Discount Deactivate
Account Name	<b>Bishop, Eric</b>
Order Start Date	<b>[Today's date]</b>
Price List	<b>B2C Price List</b>

- c. Click **Save** to save the order and continue to the order cart.
2. From the **Cart** workspace of the order, click **+ Add Products** to open the Catalog Preview.
  3. In the Catalog Preview pane, locate and add the **Infiwave Fast Charge Wireless Charging Stand** to the cart. Notice it has been automatically discounted by 10%.
  4. Expand the **Applied Discounts** list in the cart. Notice the **10% Off Everything 12mo - Acct (Account)** discount is automatically applied to the order.

5. Now you're going to deactivate the discount. From the **10% Off Everything 12mo - Acct (Account)** discount action menu, select **Delete**. Notice the status for the account discount changes to **Deactivate**.
6. In the order header, click **Submit Order**. The order is submitted and the account discount is deactivated. It will no longer be applied to any new orders.
7. Follow steps 1 - 3 to create a new order for Eric Bishop to test that the account discount has been removed.



**Yay! All done!**