Before You Begin

Did you sign up for a Industries training playground already? You'll need one to do the steps in this guide. Here's how to request one if this is your first time doing the exercises:

1. Sign up for a Industries training playground.
2. Fill out the form.
   a. For Email, enter an active email address.
   b. For Username, enter a username that looks like an email address and is unique, but it doesn't need to be a valid email account (for example, yourname@industriestraining.com).
   c. After you fill out the form, click **Sign me up**. A confirmation message appears.
3. When you receive the activation email (this might take about 10 minutes), open it and click **Verify Account**.
4. Complete your registration by setting your password and security challenge question. **Tip**: Write down your username, password, and login URL for easy access later.

You are logged in to your Industries training playground and you can begin practicing.

Exercise 2: Frame Agreement Discounts

Scenario

Infiwave sells its communication products to its B2B customers, such as Acme. Infiwave negotiates a frame agreement with Acme for a 20% discount on all accessories that Acme buys over the next two years. Infiwave creates a contract as a frame agreement for Acme. A new sales quote is created for Acme and a charging stand accessory is added. The price is automatically discounted by 20% because of the active frame agreement. If products other than accessories are added, those products receive the regular price because they are not part of the frame agreement.

Prerequisites

- Create Document Templates

Tasks

1. Create a contract-based discount
2. Create a new Opportunity
3. Review the frame agreement

Time: 30 mins

> **NOTE:**
>
> There's a recent change to session settings that affects your experience using LWC OmniScript Designer. After you get your training playground, please make this quick change before beginning exercises.
>
> 1. Click Setup (the gear icon) and choose Setup.
> 2. In the Quick Find, search for and then go to Session Settings.
> 3. Deselect Use Lightning Web Security for Lightning web components.
> 4. Clear Chrome cache after changing the setting or do a hard refresh.
>   a. In Chrome, select the three dots on the top right.
>   b. Go to Settings > Security and Privacy > Clear Browsing Data.
>
> **For more information, see**:
> https://help.salesforce.com/s/articleView?id=000393105&type=1

Task 1: Create a contract-based discount

1. Using the **Lightning App Launcher** ∷ , type `product console` in the search box. Click **Vlocity Product Console**.

2. Under Product Management, click **+** icon next to **Discount** to define a new discount.

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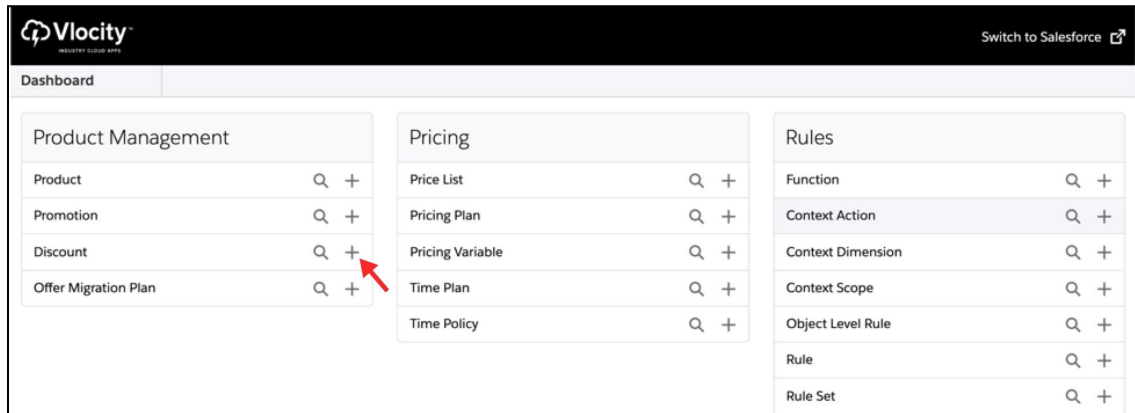
3. Enter the following information:

Field	Value
Name	Acme Contractual Discount
Code	DIS_CD
Description	Provide premium discount on products
Discount Type	**Contract**
Price List	**B2B Price List**
Discount Duration	**24**
Active	✔
Effective From	**[today's date]**

4. Click **Save**.

General Properties

* Name	Acme Contractual Discount
* Code	DIC_CD
Description	Provide premium discount on products
* Discount Type	Contract
* Price List	B2B Price List
Discount Duration	24 Months
Applies To All Items In Cart	☐

Effectivity

Active	✔
Effective From	10/6/2022 11:56 PM
Effective Until	
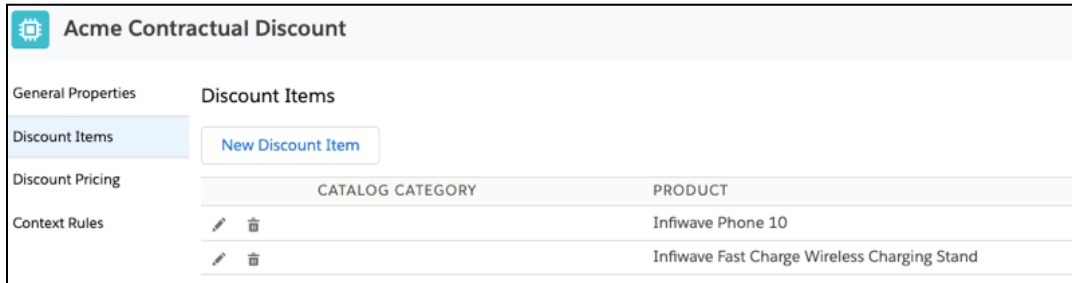
Save

5. To define a new discount item, click the **Discount Items** facet and click **New Discount Item**.

6. Enter the following information and click **Save**.

Field	Value
Type	**Product**
Product	**Infiwave Phone 10**
Active	✔
Effective From	**[today's date]**
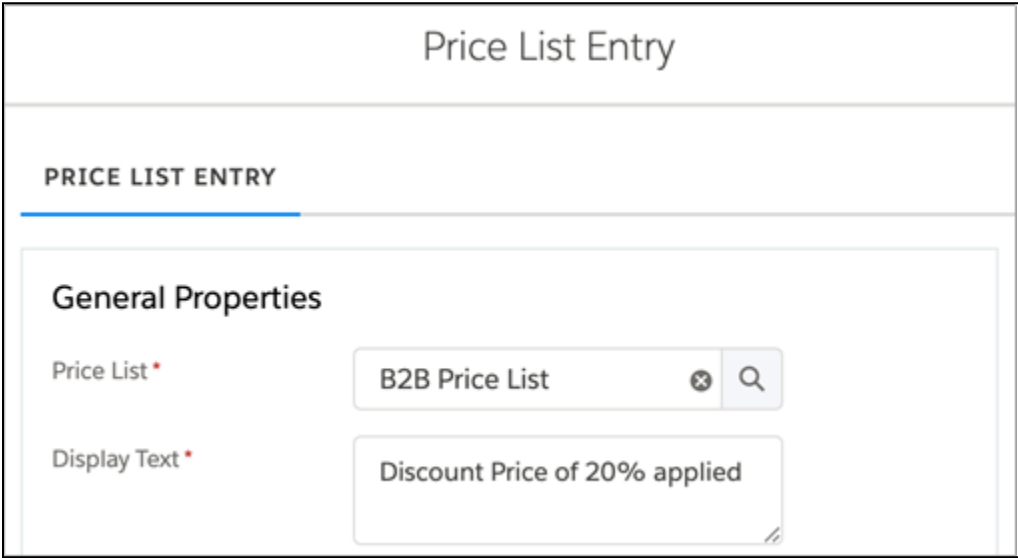
7. Similarly, add 1 more Discount Item: **Infiwave Fast Charge Wireless Charging Stand** of Type **Product**.

8. To define a new discount pricing item, click the **Discount Pricing** facet and click **New**.

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

Field	Value	Notes
Price List	**B2B Price List**	This is the price list where this price list entry will be stored.
Display Text	`Discount Price of 20% applied`	Display text is required.
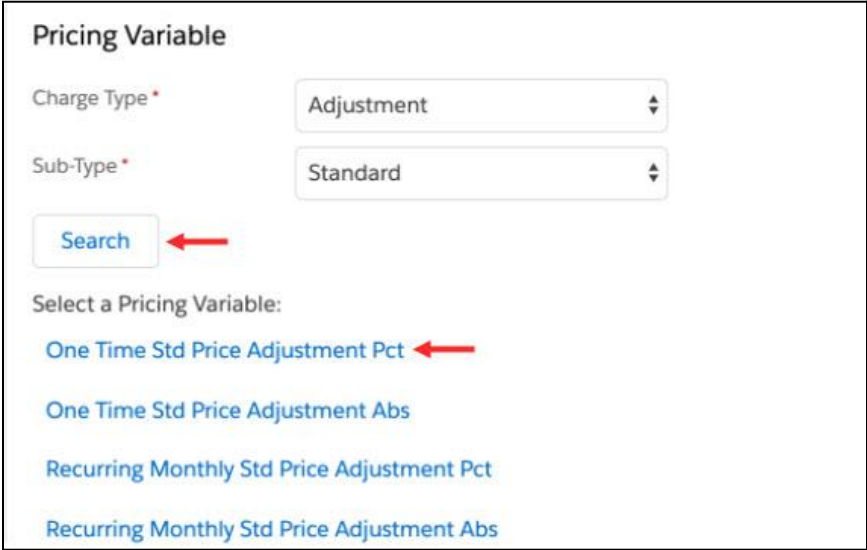
9. Find and choose the specific pricing type:

    a. Complete the **Pricing Variable** search requirements.

Field	Entry
Charge Type	**Adjustment**
Sub-Type	**Standard**

    b. Click **Search**. A list of available pricing variables displays.

c. Select **One Time Std Price Adjustment Pct** from the Pricing Variables results list.

10. Select the pricing element.

a. Notice the **Pricing Element** section displays a list of prices associated with this type of pricing.
b. In the **Pricing Element** section, select **20% Off**.
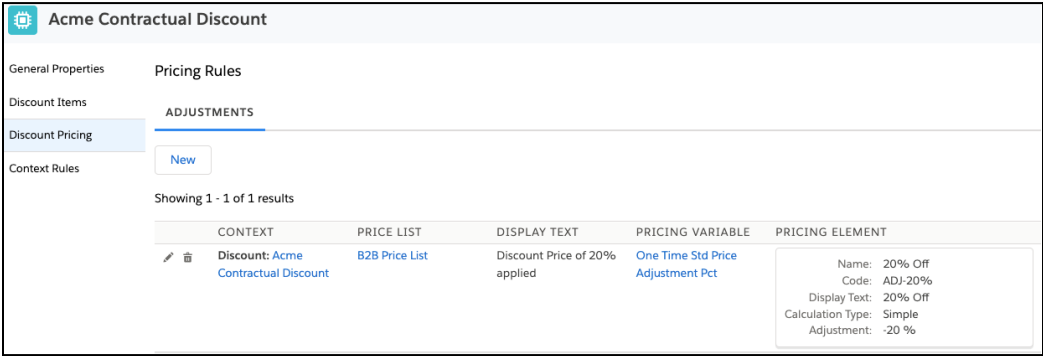
11. Ensure the product can appear in the Product list of the cart by setting the product price to be effective immediately and have an active status.

   a. In the Effectivity section, complete this information.

Field	Entry
Effective From	**[today's date]**
Active	✔

   b. Click **Save**. The price list entry now displays in the list of pricing adjustments for the product.

NOTE:
After you configure Discount Pricing, confirm that the Adjustment Value in the Pricing Elements facet for the Price List Entry is not empty. If you do not specify an Adjustment Value in the Price List Entry, the discount will not be applied to eligible products in the Cart.

Task 2: Create a new Opportunity

1. Create a new Opportunity

   a. Using the **Lightning App Launcher** ⠿ , type opportunities in the search box. Under **Items**, click **Opportunities**.
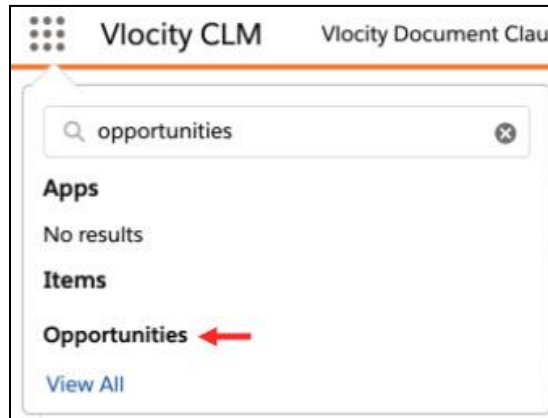
   b. This launches the **Opportunities** tab. Click **New**.
   c. Complete the following fields and click **Save**.

Field	Value
Opportunity Name	`Frame Agreement(Discount)Oppy`
Account Name	**Acme**
Stage	**Needs Analysis**
Close Date	**[today's date]**

d. From the Power Launcher, click **Configure**. This invokes the Cart.

2. From the Price List drop-down, select **B2B Price List**.

3. Click on the **DISCOUNTS** tab, add the new contract-based discount created in the previous steps **ACME CONTRACTUAL DISCOUNT** to the cart. This applies the

discount to the product.
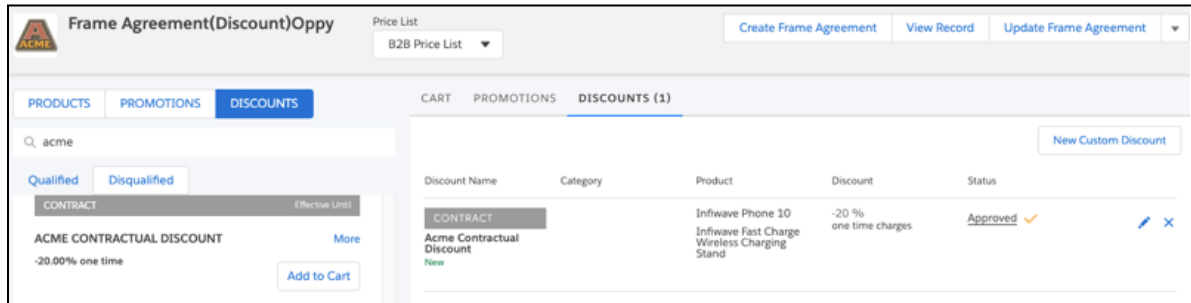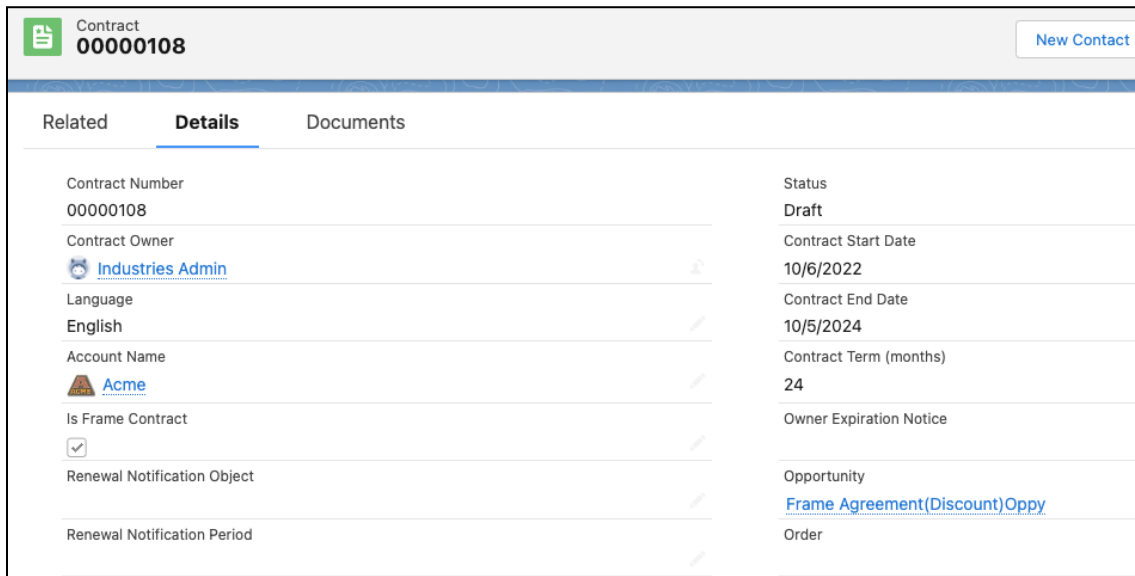
4. Click **Create Frame Agreement**. This creates a new contract record and moves the negotiated discounts over to the contract record.

5. Click the **Details** tab on the Contract page and notice that the **Is Frame Contract** checkbox is checked.

6. Edit the following fields on the contract **Details** tab and click **Save**.

Field	Value	Description
Contract Start Date	**[today's date]**	Enter a start date that you want the discounts to take effect
Contract Terms (months)	**24**	Optional

> **NOTE:**
> If you don't define the Contract Start Date, you will not see the effective start dates and end dates for the discounts and the discounts will not apply.

7. Click the **Documents** tab and scroll down the page to the **DOCUMENTS** section and click **Manage Contract Terms**.
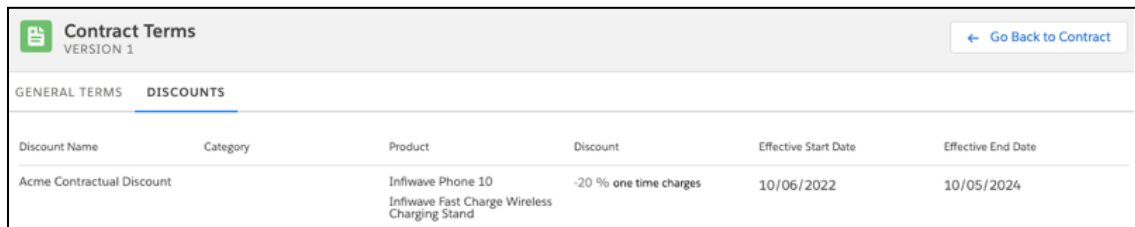
8. Click the **DISCOUNTS** tab to see the pricing terms with the effective start and end dates.
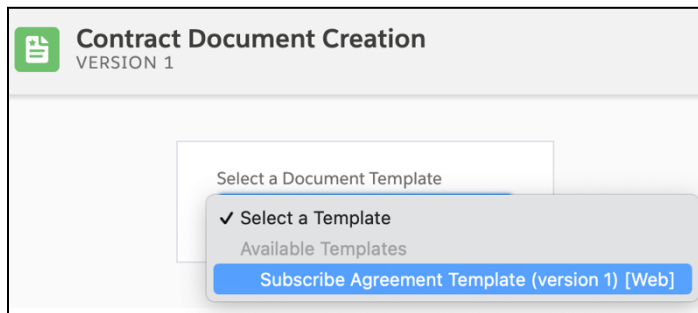

9. Click **Go Back to Contract** to view the Contract Detail page again.

10. Generate the document.

    a. Click **Generate**.
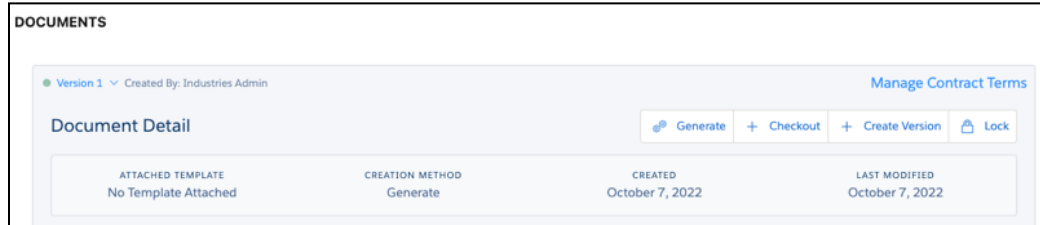
    b. Select the **Subscribe Agreement Template (version 1) [Web]** template to generate the contract.

    c. Click **Check In**.

11. Complete the contract lifecycle to eSign the contract.

    a. Submit the contract document for internal approval.

    b. Send the contract for eSignature.

The contract status changes to Signed.

12. Click **ACTIVATE FRAME AGREEMENT** to set the status to Activated.
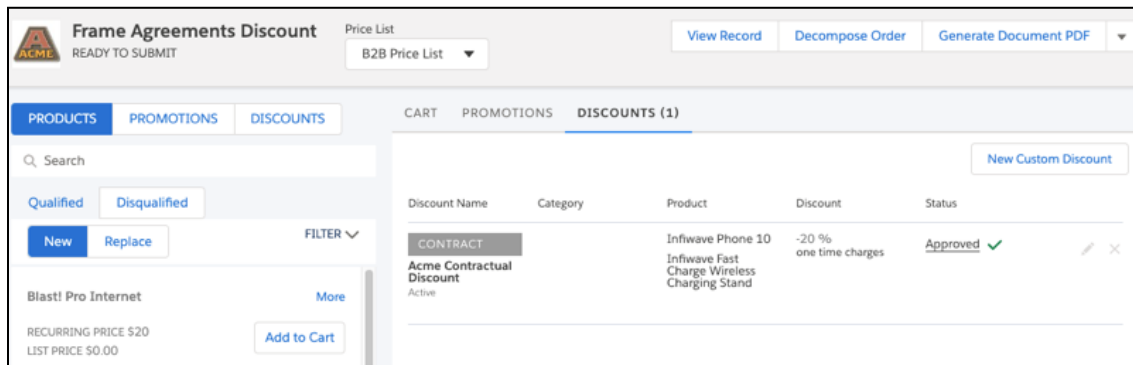
Now future orders can use this contract.

Task 3: Review the frame agreement

1. Create a new order using the frame agreement you just created.

   a. In the **Lightning Navigation bar**, click the **Orders** tab and click **New**.

   b. Complete these fields and click **Save**.

Field	Value
Order Name	Frame Agreements Discount
Account Name	**Acme**
Price List	**B2B Price List**
Order Start Date	**[today's date]**
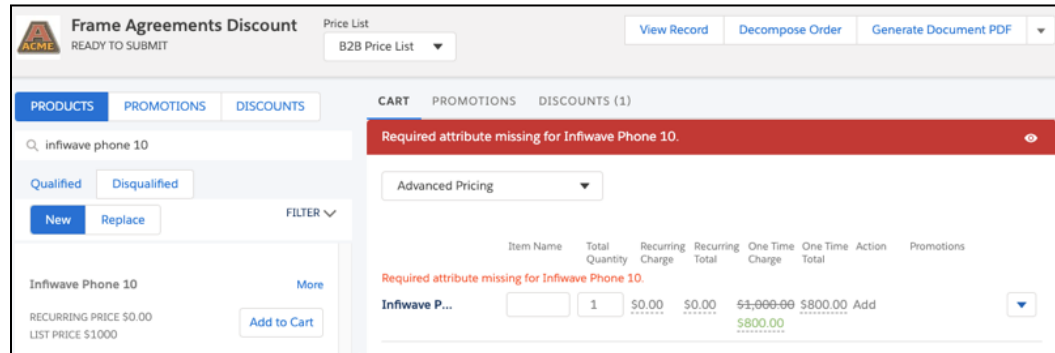
   c. From the Power Launcher, click **Configure Order**. This invokes the Cart.

2. Click on the **DISCOUNTS** tab in the cart and notice the discount contract **Acme Contractual Discount** is added to the cart.

3. Search for the product **Infiwave Phone 10** and add it to the cart.

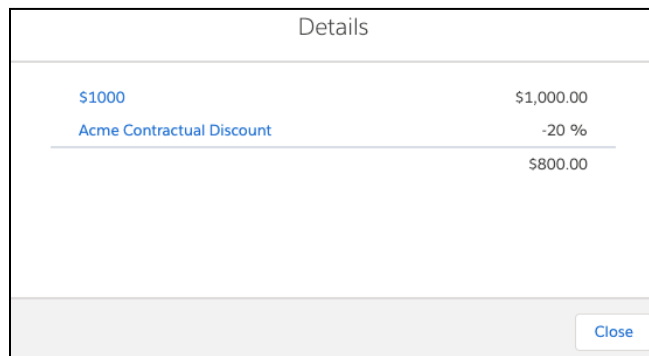   a. In the search field under the **PRODUCTS** list, enter Infiwave Phone 10.

b. Click **Add to Cart**.

4. View the display text for the pricing changes.

   a. Click on the **CART** tab.
   b. In the **One Time Charge** column, to the right of **Infiwave Phone 10**, click the green adjusted price link.
   c. Click the **information** icon .
   d. In the **Details** popup window, notice the text you entered in the display text field of the price list entry for the **Infiwave Phone 10**.

   e. Click **Close** to close the **Details** popup window.

5. Similarly, add the **Infiwave Fast Charge Wireless Charging Stand** to the cart and note the discount applied.