



SALES CONTRACTS AND SERVICE CONTRACTS FOR SALESFORCE CPQ TIP SHEET

Salesforce CPQ provides a customizable contract management process to help sales reps manage their contracts and subscriptions over multiple renewals and amendments. Service Cloud users can integrate the same workflow to their service contract process. Review this tip sheet for information about the similarities and differences between CPQ contracts in Sales Cloud and CPQ contracts in Service Cloud.

Sales Contracts

The Sales Cloud's contract object lets you track details of closed opportunities. The standard Salesforce CPQ workflow extends the contract object to store information on subscriptions sold during the quoting process. CPQ sales reps can then amend or renew the subscriptions and any related assets into an amendment or renewal quote.

Salesforce CPQ creates a contract whenever a sales rep contracts an opportunity or order with at least one renewable subscription quote line. The contract contains a subscription record for each of the contracted quote lines. During the contracting process, Salesforce CPQ also creates an asset record to represent a quoted one-time product, which you can view in an account's Assets related list. By default, contracts don't include one-time products. However, some subscriptions, such as warranties, base their prices off a collection of assets. In this case, Salesforce CPQ links the asset to the parent subscription through a linking object called a covered asset. When a sales rep renews the quote, Salesforce CPQ pulls the subscription and its covered assets into the renewal quote. The covered assets create quote lines with a net total price of zero so that the renewed subscription can keep its price for the next subscription period.

Service Contracts

The Service Cloud's service contract object represents a customer agreement or guarantee made on a product or service. Warranties are a common type of service contract, as they promise the necessary repair or replacement of a product within a given period. Service contracts are also useful for service level agreements, where one party agrees to provide deliverables to accommodate a service.

The Service Cloud for Salesforce CPQ integration package allows users to extend their Service Cloud implementation with a workflow similar to the CPQ contracting process used in Sales Cloud. When you have the Service Cloud integration package installed with CPQ, sales reps can also contract an order or opportunity to create a service contract with information about quoted entitlements. In this workflow, the service contract represents the quoted entitlements as contract line items rather than subscriptions.

The Service Cloud also uses the entitlement object to measure whether a customer is eligible for support. Multiple entitlements can each look up to a parent contract line item. When you work with Service Cloud for Salesforce CPQ, the entitlement serves the same purpose as the sales cloud's subscribed asset.

Sales and Service Equivalencies in Salesforce CPQ

Sales Cloud	Service Cloud
Contract	Service Contract
Subscription	Contract Line Item
Subscribed Asset	Entitlement

The Salesforce CPQ contracting process works the same between contracts and service contracts, with the following exceptions.

Sales Contracts and Service Contracts for Salesforce CPQ Tip Sheet

- Summary variables in price rules can't target contract line items.
- Service Cloud users can't perform asset-based renewals.
- The Service Cloud for CPQ package doesn't support using the service contract's Amendment Price book ID field.

Documentation

For standard Salesforce CPQ contract documentation, review [Manage Your Subscriptions and Assets](#). For help topics specific to the Service Cloud for Salesforce CPQ package, review [Service Cloud for Salesforce CPQ](#).

Service Cloud for Salesforce CPQ contains all the bug fixes from standard CPQ packages. In [Salesforce CPQ patch notes](#), all Service Cloud-specific bug fixes are called out with the [Service Cloud] label in their For column. A list of bug fixes for the Service Cloud for Salesforce CPQ package, review [Service Cloud for CPQ Patch Notes](#).