

Downstream impact from quote configuration:

Project Billing Rate Sheet (PBRS) on Contract Rate Sheet:

- No PBRS is defaulted to the PBRS field on the contract rate sheet.
- Since there is no billing rate rule created on the cost rate sheet from the quote, PBRS prompt is editable.
- If a PBRS is added to the contract rate sheet and there is a billing rate rule set up, PBRS is not editable.
- If a PBRS is added to the contract rate sheet, Unit List Price on PBRS will default in the Standard Rate column on the contract rate sheet.
- When you override a unit cost on a quote role line, Workday automatically:
 - Passes the new value to the **Standard Cost Rate Override** field on the resource plan line.
 - Passes the service currency to the **Standard Cost Rate Currency Override** field.

Note: You can't edit these fields on the resource plan line until the associated opportunity project has a status of *Closed/Won*.

- When you don't enable **Role Unit Cost Overrides** for quotes, the two override fields on the resource plan line display as empty.

Downstream impact on Projects:

- Workday automatically creates Opportunity Project, Resource Plan, Resource Forecast are from the Primary Quote Approval;
- When a Services CPQ user creates a new primary quote under a Service: Workday inactivates the corresponding opportunity project for the previous primary quote.
- Fields not passed from the quote are editable on the Opportunity Project and Resource Plan Lines
- When the opportunity is open, you can edit these fields and tabs on the project summary:
 - Dependencies
 - Display Project in Opportunity Marketplace
 - External Link
 - External Project Reference
 - Ideas
 - Optional Project Hierarchies (Only editable on the Create Project business process.)
 - Owner
 - Project Groups
 - Project Plan tab
 - Resource Plan tab (Only fields not from the quote.)
 - Status
- When the opportunity is open you can edit these fields on the project details:
 - Importance
 - In Scope
 - Measures of Success
 - Objective

- Out of Scope
- Priority
- Problem Statement
- Project Overview
- Risk Level
- Success Rating (Only when Percent Complete = 100%.)
- The **Probability of Success** report field derives the value from an open and active opportunity from a quote.

After an opportunity project is created from a quote, you can also:

- Add multiple project resources on resource plan lines:
 - Workday initially creates the resource plan with 1 unnamed resource for each role defined in the quote, but you can use the **Edit Resource Plan** task to add more named and unnamed resources to the role.
 - This capability provides resource managers with more flexibility in staffing opportunity projects.
- Edit the resource forecast:
 - Workday initially creates the resource forecast with all the hours that the Services CPQ user entered in the quote allocated to the 1 unnamed resource associated with the role.
 - You can use the **Edit Resource Forecast** task to change the forecast hours to values different from those in the quote.
 - When you add other resources to a resource plan line, you can manually allocate hours to each resource.
 - When you manually change the forecast hours and want to go back to the hours entered in Services CPQ, you can select **Recalculate** from the **Edit** drop-down on the **Resource Forecast** tab on the project.
 - When you define multiple resources for a resource plan line and recalculate the forecasted hours, Workday distributes the hours equally between the resources using the allocation structure from the quote.
- **Note:** When you make changes to resource forecast allocations, the total number of hours might not match the estimated hours in the corresponding resource plan lines. (This is an existing Projects functionality.)
- **Note:** When you update the total number of hours in a time period for a resource plan line on an opportunity project, and then recalculate the resource forecast, Workday recalculates the total number of hours using the allocation structure from Services CPQ.
 - Example: You create a quote role line for Consultant, and enter 40 hours for Week 1. In the project resource plan line, you add a second consultant resource, and enter 30 hours for each consultant for Week 1. When you recalculate, Workday sets the hours to 20 hours for each consultant for Week 1.
- **Note:** If you've configured the **Recalculate Services CPQ Resource Forecast** service on the *Project Resource Plan Line* business process to update forecasts automatically or conditionally:
 - When a Services CPQ user deletes a Service: Workday deletes the corresponding resource plan lines and resource forecast lines.

- When a Services CPQ user deletes a quote role line: Workday deletes the corresponding resource plan lines, resource forecast lines, Task Resources, and any pending Request Worker events.

Downstream impact on Projects on when you edit an approved quote:

- When the modified quote is not a primary quote, there is no downstream impact on project objects.
- When the modified quote is the primary quote:
 - When you **Delete** a service, Workday inactivates the associated opportunity project.
 - When you **Add** a service, Workday creates a new Opportunity Project for the additional service on the quote.
 - When you **Add** a role line, Workday adds a resource line to the project.
 - When you **Delete** a role line, Workday deletes the resource line from the project and removes the worker from the assignment.
 - When the quote is not a primary quote prior to the edits but becomes one after the changes, Workday automatically creates new projects for the services on this quote.
- When the user modifies an approved quote and the approver denies the change, consider this behavior:
 - If the quote was primary prior to the change, it will remain primary with no changes and the associated projects will remain active.
 - If the quote was not a primary quote prior to the change, it will remain non-primary without any associated projects.
 - If the quote was the primary quote at one point but changed to non-primary, the associated projects will be set to *Inactive*.

Note: When you convert the opportunity project to a full project, Workday makes all the fields available to edit

Downstream impact on Contracts from configurations selected in a quote:

- **On Customer Contract generation:** For Contract Lines:
 - **Role:**
 - Revenue Treatment defined in Services CPQ Settings defaults the Role Revenue Treatment in the contract.
 - Revenue Schedule Template (Revenue Recognition Schedule) defaults from the Role Revenue Schedule Template defined in Services CPQ Settings.
 - Use Standard Rate Sheet is derived from Services CPQ Settings default value for Use Standard Rate Sheet.
 - Revenue Adjustment Reason is derived from Services CPQ Settings and applied to all contract rate sheets for time and expense role lines.

- **Expense:** Revenue Treatment defined in Services CPQ Settings defaults the Expense Revenue Treatment in the contract.
 - Revenue Schedule Template (Revenue Recognition Schedule) defaults from the Expense Revenue Schedule Template defined in Services CPQ Settings.
- **Third Party Cost:** Revenue Treatment defined in Services CPQ Settings defaults the Third Party Cost Revenue Treatment.
 - Revenue Schedule Template (Revenue Recognition Schedule) defaults from the Third Party Cost Revenue Schedule Template defined in Services CPQ Settings.