

10 Principles for DealHub Beginners

a companion for [10 DealHub Mistakes we Made](#)

Get Your Easy Wins

1. Begin with the end in mind.

The signable document is the core deliverable in CPQ. Every configuration, rule, and automation should support creating an accurate, professional quote. Prioritizing the document keeps efforts focused.

2. Use document counters.

Counters as proposal attributes dynamically manage document logic. They control what content appears based on quoted products, ensuring precise presentation rules.

3. Plan your tags

Tags simplify product presentation and discount calculations. They help sort pricing tables, apply list price factors, and structure discounts. For example, software can be grouped in one table and hardware in another.

Keep It Simple

4. Stick to a single playbook, document, and DealRoom.

Unless supporting distinct teams with separate quoting processes, avoid duplicating playbooks, documents, or DealRooms. Redundancy increases workload and inconsistency risks.

5. Automate sparingly.

While automation can improve efficiency, excessive automation adds rigidity. Focus on automating predictable, repeatable tasks that reduce manual effort.

6. Focus the DealRoom on signing.

DealRooms should facilitate signing, not overwhelm customers. Maintain branding without mimicking a website. Keep it simple and let the signature block do the work.

7. Stick with numeric answers.

Numeric inputs are the simplest and most efficient for users. Numeric ranges and picklists may seem useful but often slow down quoting and add restrictions.

Mind Administrator Fundamentals

8. Version frequently and incrementally.

Each version should represent a single, well-defined change. Small iterations make troubleshooting easier and updates more predictable.

9. Comment every version.

Since you're versioning frequently, include comments explaining changes. This makes troubleshooting and revisiting past solutions easier.

10. Collect your garbage.

Not everything built will be used. Remove unused elements systematically rather than letting them accumulate. Always version up before deleting, allowing for rollbacks if needed.

By following these principles, DealHub beginners can streamline quoting, avoid pitfalls, and maintain an efficient CPQ system.



<https://www.thriviti.com>

