Salesforce CPQ and its product rules are designed to help sales reps get the right products on the quote the first time around. Think of product rules as guardrails, there to help sales reps stay on course when navigating complex combinations of products and services. As an admin, putting a small amount of effort into creating product rules can save huge amounts of time and money for your business, while keeping your customers happy.

**Product Rules for All Occasions**

Product rules come in four flavors. Let’s look at the different types and the different ways you can use them to help your sales reps.

| **Type** | **Purpose** | **Example** |
| --- | --- | --- |
| Alert | Shows a message to your sales reps about a potential issue but allows them to ignore it. | Reminds sales reps of an upsell opportunity when they add a specific product to the quote. |
| Validation | Shows a message to your sales reps about a problem they must fix before they’re allowed to save the configuration or quote. | Tells sales reps they’ve selected the wrong toner for the printer they’re trying to add and stops them from saving the illegal configuration. |
| Selection | Automatically adds, removes, or hides products during bundle configuration. Also, automatically adds products to a quote. | Pre-checks options in a bundle based on the account’s industry type; unchecks and hides options known to be incompatible. |
| Filter | Shows only specific products in a feature that uses the Dynamic selection option. | Lists only products with a product code that contains the letters “cable” in a mini product selection page. |

When CPQ admins talk about product rules, they usually abbreviate the name of the rule. For example, they frequently shorten “validation product rule” to just “validation rule.” It’s OK to call it that. Just remember that it’s really a product rule of a certain type, and you go to the same tab in Salesforce to create all types of product rules.

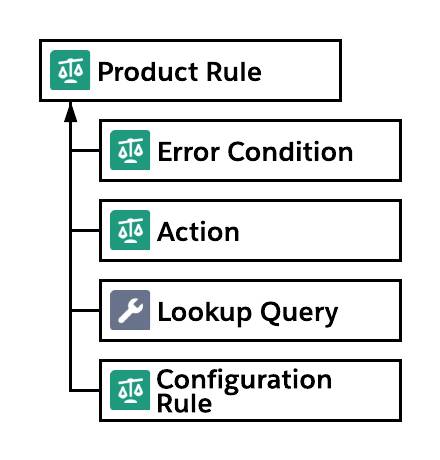
## Product Rules Are a Team Effort

CPQ administration usually requires you to create or update records of some sort, often across multiple objects. Product rules are no different. Each object related to product rules has a specific role to play in the show we call “Quote the Right Thing.” Let’s meet the cast of characters, starting with our star performer.

**Product Rule**

The phrase product rule has two meanings. First, it’s meant to describe the concept of business logic that helps sales reps get the right products onto the quote. Second, it refers to the actual object named product rule.

A product rule record has a few details about how the rule should behave, but mainly it acts as a container, or point of contact for any records on other objects related to the rule. There are four other objects that look up to it. A product rule can technically work without related records, but it won’t do much. To really make the best of product rules, you must include at least one of the other (following) related objects.



**Error Condition**

Simply put, error conditions control when rules trigger. With the right error conditions, your rules will only run when they need to.

**Action**

Actions are records that hold the instructions for how CPQ should make changes to the way a bundle is configured. They’re mostly used for selection rules, but have a small role in filter rules too.

**Lookup Query**

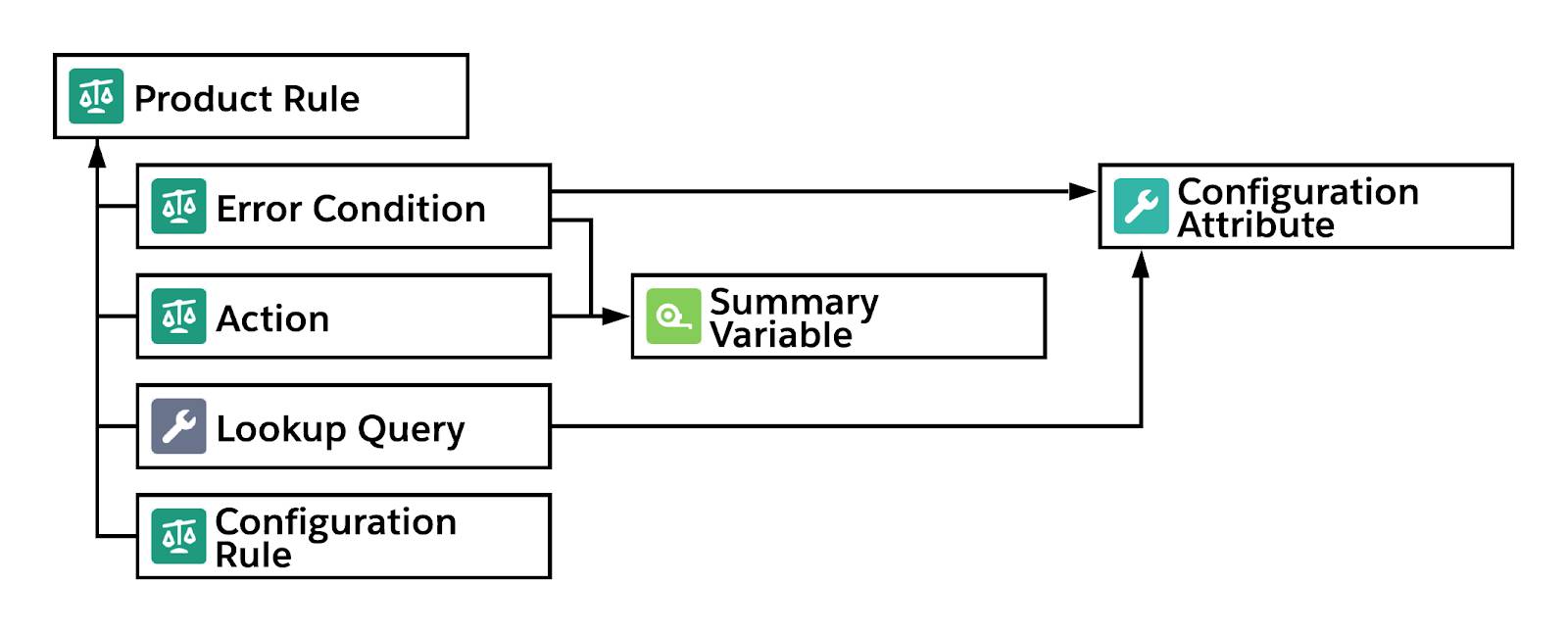
Sometimes businesses have many product rules that differ by only a little bit. In that scenario you can create one rule that looks to a data set to drive behavior. Lookup queries tie a product rule to the object that houses the data set.

**Configuration Rule**

You create a configuration rule to tell CPQ that a product rule applies to a specific configurable bundle. If you need the rule to apply to more than one bundle, you just create more configuration rule records.

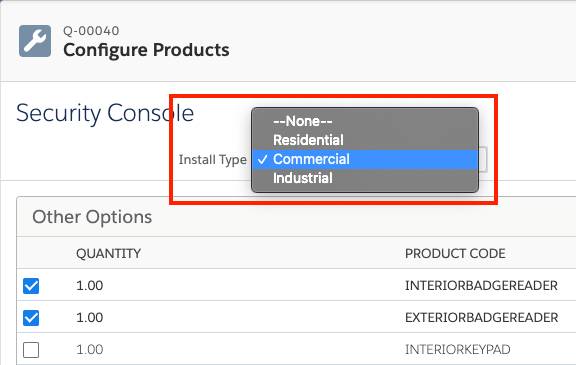
## Other Contributors

In addition to the four main objects related to product rules, there are a few other objects that often contribute to how product rules behave.



**Configuration Attributes**

Configuration attributes take the form of a field that sales reps can set during product configuration.



Although configuration attributes are not directly related to product rules, they’re often used as part of error conditions, and sometimes as part of lookup queries.

**Summary Variable**

A summary variable is another CPQ-specific tool sometimes seen in product rules, and it does one simple task: add up values across many CPQ-related records. It’s a little like a rollup summary field, but with some advantages specific to CPQ. Summary variables are often used in error conditions, and sometimes actions.

So those are the objects that can possibly contribute to a product rule. Some rules use only a few objects, and others use all of them. By the time you’re done with this module, you’ll have created rules that use all parts.

## Under the Right Conditions

An error condition is basically a test, the pass/fail kind of test. It looks at some data (like a quote line’s product code) and compares it to other data (like the string “CLOUDSTORAGE”). In this example, it checks if they’re equal. If so, the test passes and the rule is one step closer to running.