Selection Rules

Set up your product rules to automatically add, remove, hide, enable, or disable options in a bundle.

Selection rules let you adjust product options in a bundle on your quote. For example, let’s say you sell a reporting software bundle. You can sell training license only after your user buys a software license, both of which are product options in your bundle. In this case, you can create a selection rule that initially hides the Reporting Software Training product option from the bundle. The configurator then shows Reporting Software Training only when the sales rep selects the bundle’s Reporting Software License option.

Selection rules use configuration rules to specify a bundle to target. The configuration rule’s Product field represents the bundle you’re targeting. You can also set your configuration rule’s product field to a specific bundle so your product rule can target that bundle across multiple quotes.

Selection rules also use actions alongside error conditions. An action represents the step your selection rule performs when the rule meets its error conditions. When your rule meets its conditions, it checks the action for a product to target. This product is the product option you want to change within the bundle you defined in the configuration rule. The rule then performs the step defined in the action’s Type field. You can select from the following action types:

| TYPE | DESCRIPTION |
| --- | --- |
| Add | Add the specified option. |
| Remove | Deselect the specified option. Not supported for quote-scoped selection rules. |
| Enable | If an option is disabled, this action enables the checkbox so users can select it. |
| Disable | Disable an option so users can’t select it. |
| Enable and Add | Enable an option and select it. |
| Disable and Remove | Deselect an option and disable it so users can’t select it. |
| Show | Show a hidden option. |
| Hide | Prevent an option from showing. |
| Show and Add | Show the option and select it. |
| Remove and Hide | Deselect an option and hide it from view. |
|  |  |

Example

EXAMPLE Let’s jump back to the example at the beginning of this topic. Before making your rule, create a summary variable to count the quantity of Software Reporting License product option. Then, use that variable in your rule’s error condition.

| SELECTION RULE COMPONENTS | FIELD VALUES |
| --- | --- |
| Product Rule | * Name: Show Reporting Software Training * Type: Selection * Condition Met: All * Scope: Product |
| Error Condition | * Tested Variable: Reporting License Count * Operator: Greater or Equals * Filter Type: Value * Filter Value: 1 |
| Product Action | * Type: Show * Product: Reporting Software Training * Required: True |
| Configuration Rule | * Product: Software Options * Active: True |

Example

EXAMPLE Your computer design company has a quote with two quote line groups: one for a red monitor package and one for a silver monitor package. You control these package types with a custom Color field on the quote line group. Users who buy either package can add a monitor bundle, which contains a product option for the monitor stand. You want a product rule that adds a support stand for every monitor added to the red package:

| SELECTION RULE COMPONENTS | FIELD VALUES |
| --- | --- |
| Product Rule | * Name: Add Stand to Red Package Monitor Bundles * Type: Selection * Condition Met: All * Scope: Product * Evaluation Event: Always |
| Error Condition | * Tested Object: Quote Line Group * Tested Field: SBQQ\_\_Color\_\_c * Operator: Equals * Filter Type: Value * Filter Value: Red |
| Product Action | * Type: Add * Product: Monitor Stand * Required: True |

* [**Selection Rules in Nested Bundles**](https://help.salesforce.com/articleView?id=cpq_sel_rules_nested_bundles.htm&type=5)  
  Use selection rules within nested bundles to expand the scope of options Salesforce CPQ considers when evaluating options in the configurator.