Mapping Custom Fields Between Objects

Certain pairs of CPQ objects pass custom field values from the first object to the second object when the second object is created. The values pass if the custom fields are editable, have matching field types, and have matching API names. We call these field pairs “twin fields.”

**REQUIRED EDITIONS**

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| --- |
| Available in: All Salesforce CPQ Editions |

One-Way Mapping

Important

IMPORTANT

* To map one field to another, you need Read access on the source field and Edit access on the target field.
* Standard fields can’t be mapped between objects.

Objects in Column 1 of this table pass field values to custom fields with matching types and API names from the objects in column 2.

| COLUMN 1 | COLUMN 2 |
| --- | --- |
| Contract | Opportunities made from amending or renewing the contract |
| Service Contract | Opportunities made from amending or renewing the service contract |
| Opportunity Products | Quote Line  Salesforce CPQ maps from opportunity products to quote lines only for standalone products and only when opportunity products have been created before a sales rep creates the opportunity’s first primary quote. |
| Product | Quote Line |
| Product Option | Quote Line  If a product and product option both have the same field as a related quote line, the quote line field inherits the value of the product option field. |
| Quote | Order  The quote’s Payment Terms field is an editable picklist field, while the order’s Payment Term field is restricted to a global picklist value set. If an admin adds a custom picklist value to the quote’s Payment Term field, and then a sales rep order the quote, Salesforce CPQ encounters an error. |
| Quote Line | Order Product |
| Quote Line | Opportunity Product |
| Quote Line | Subscription |
| Quote Line | Assets |
| Quote Line | Contract Line Item |
| Subscriptions | Quote Line  On amendment quotes, quote lines inherit twin field values from the first subscription record, not any amended subscriptions made from that record. |
| Contract Line Item | Quote Line |
| Order Product | Invoice Line |
| Asset | Quote Line  Salesforce CPQ maps from the asset back to the quote line only during amendment and renewal processes when quote lines are generated from assets. |

Mapping in the Configurator

When a bundle is configured, objects in Column 1 pass their custom field values to the resulting new quote lines. When you open the configurator to reconfigure the bundle, Salesforce CPQ sets product option and configuration attribute values based on matching field values from their related quote lines.

| COLUMN 1 | COLUMN 2 |
| --- | --- |
| Configuration Attributes | Quote Line  Configuration attributes always map to the bundle parent’s quote line. They map to the bundle’s child products only when the configuration attribute’s Apply to Product Options field is enabled. Mapping occurs only for quote lines that are product options of the bundle containing the configuration attribute.  Configuration attribute-to-quote line mapping includes quote line fields on segmented quote lines. |
| Product options | Quote Line |

Note

NOTE If you make a bundle a Favorite and then add that favorite to the quote line editor, it won’t capture any twin field values.