



Salesforce CPQ Fast Path

Partner Practice Development



Safe Harbor

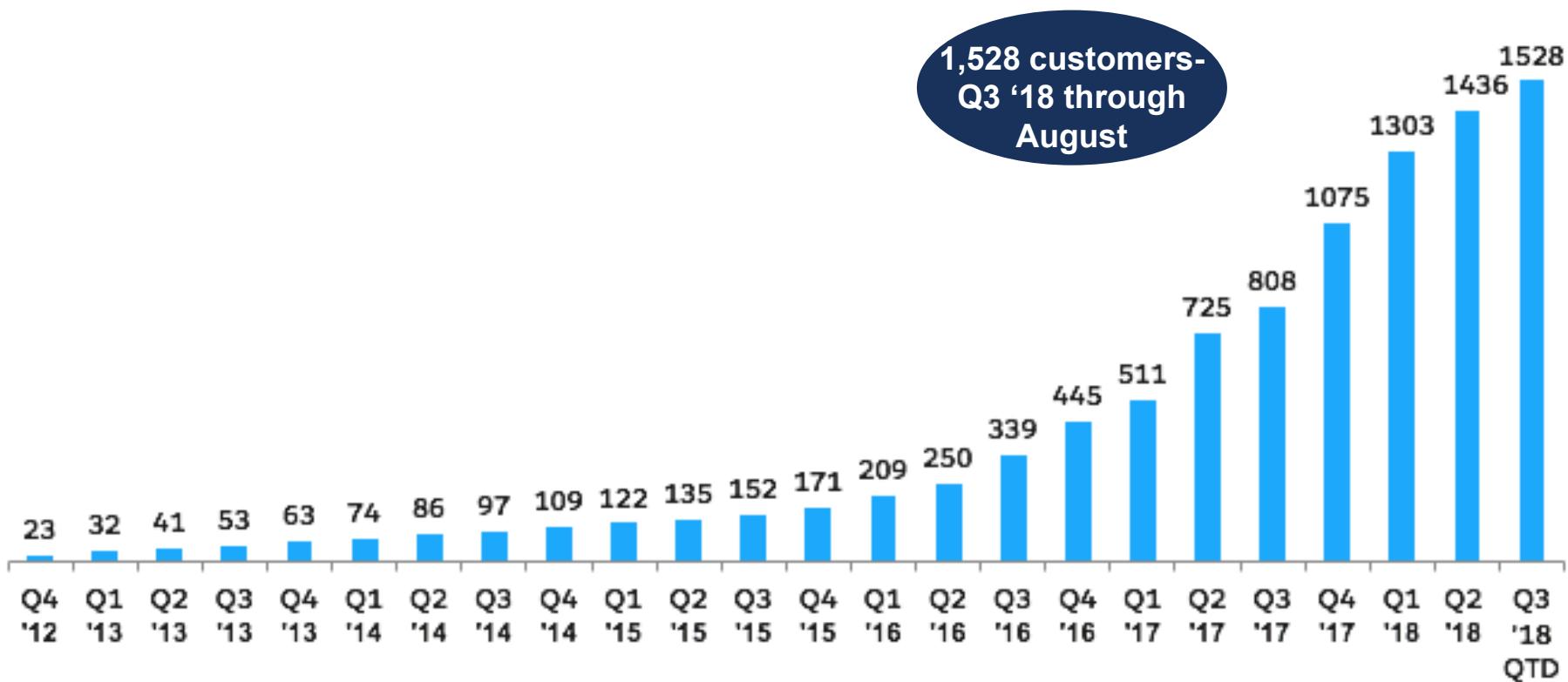
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QTC Customer Growth



The Face of Sales Is Changing

Helping is the new selling

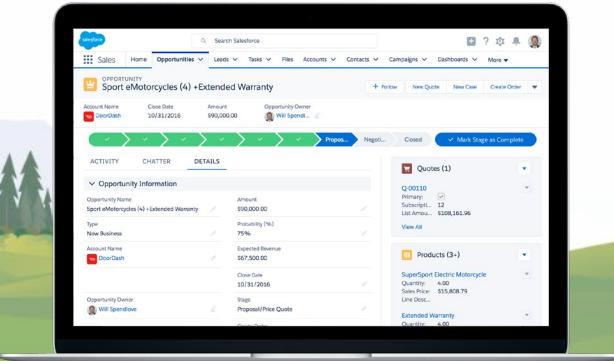


Sales Reps Struggle to Keep Up With Demands

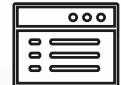


Disconnected Data, Processes and Systems Hurt Efficiency

Sales Opportunity



Quotes & Contracts



Homegrown



Legacy CPQ

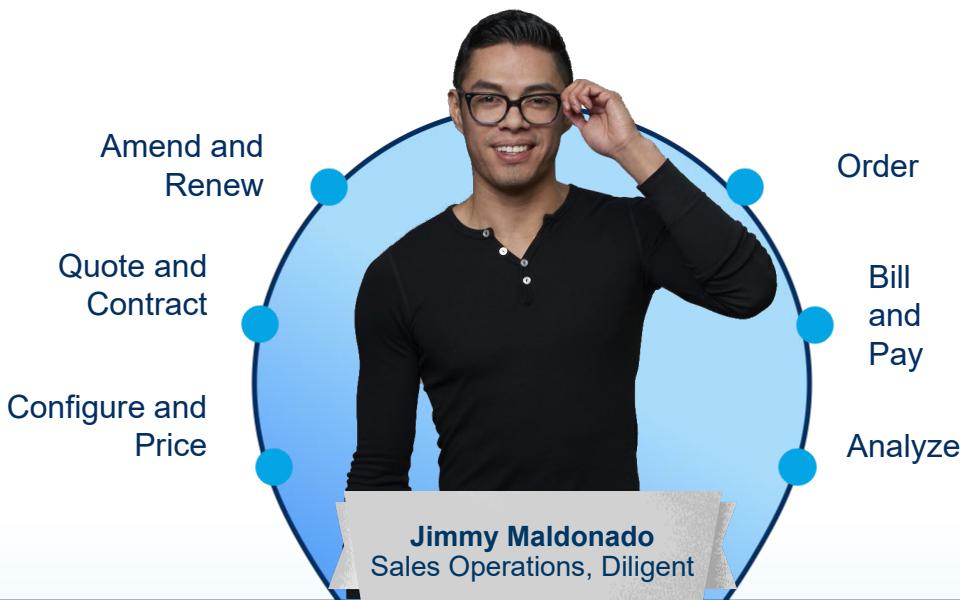
Accounting & ERP



Salesforce CPQ: Your Fastest Path to Optimize Quote-to-Cash



Built on the world's #1 CRM



A screenshot of the Salesforce CPQ interface titled "Configure Products". The screen displays a table of "Licenses" with the following data:

IMAGE	QUANTITY	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
	1	T&E Suite Admin License	Subscription for one (1) Time and Expense Administrator	USD 80.00
	350	T&E Suite Time and Expense User License	Subscription for one (1) Time and Expense user	USD 60.00
	10	T&E Suite Finance and Reporting License	Subscription for one (1) Finance and Reporting user	USD 25.00

Below the main table, there is a section for "Add-Ons" which is currently empty.



TRAILHEAD



EINSTEIN



IOT



HEROKU



ANALYTICS



APP EXCHANGE

SALESFORCE PLATFORM

It's Time For Salesforce CPQ & Billing



Build Recurring Customer Relationships

Configure Quotes with Speed and Accuracy

Guided selling, discounting and approvals

Optimize Discounting and Pricing

Track CPQ trends with Einstein Analytics

Increase Customer Retention with Subscription Billing

Create invoices, manage orders, and collect cash

Connect any Sales Process, any System

Deliver a unified experience on the Salesforce Platform

A composite image showing the Salesforce CPQ & Billing interface. On the left, a smartphone displays the "Quote Approval" screen for quote Q-00010, showing details like Account (Global Media), Opportunity (Global Media - 100 Users), Owner (Admin User), and financial metrics (List Amount \$41,260.00, Net Amount \$41,098.00, Avg. Customer Disc. (%) 0.5%). On the right, a larger tablet screen shows the "Quote Line Editor" for quote Q-00110. It lists items such as SuperSport Electric Motorcycle, Dual Sport Tires, On Board Charger, Charge Tank, Sport Foot Pegs, Top Box Rack Kit, and Factory Warranty, with columns for Product Code, Product Name, Quantity, Unit Cost, List Unit Price, Additional Disc., Margin, and %.

Salesforce CPQ Drives Customer Success



Improved Quote
to Order
Conversion
+ 29%

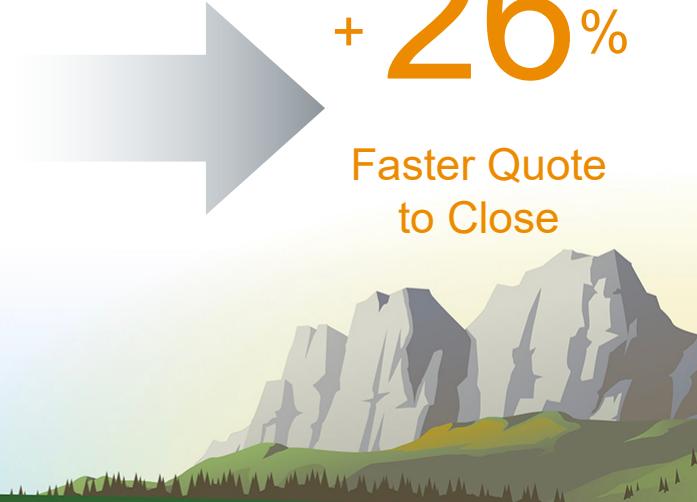
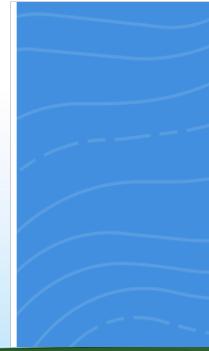
Reduced
Approval Time
+ 32%

Faster Quote
Generation
+ 41 %

Reduced
Quote Errors
+ 44 %

+ 26%

Faster Quote
to Close



Percentage Improvements Reported by Salesforce Customers

Source: Salesforce CPQ Survey conducted August 2016, by an independent third-party, Socratic Technologies, on 142 customers randomly selected. Response sizes per question vary.

Salesforce CPQ Life Cycle

A Happier Path



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Product
Configuration

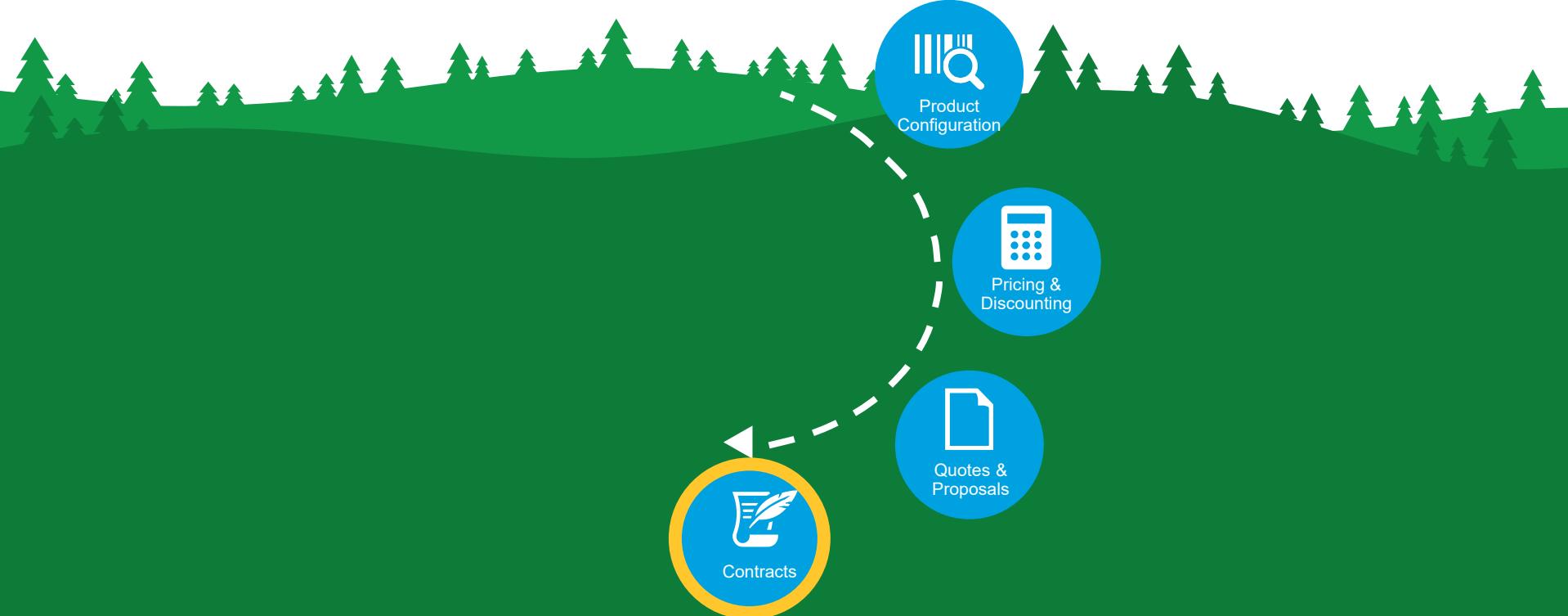


Pricing &
Discounting

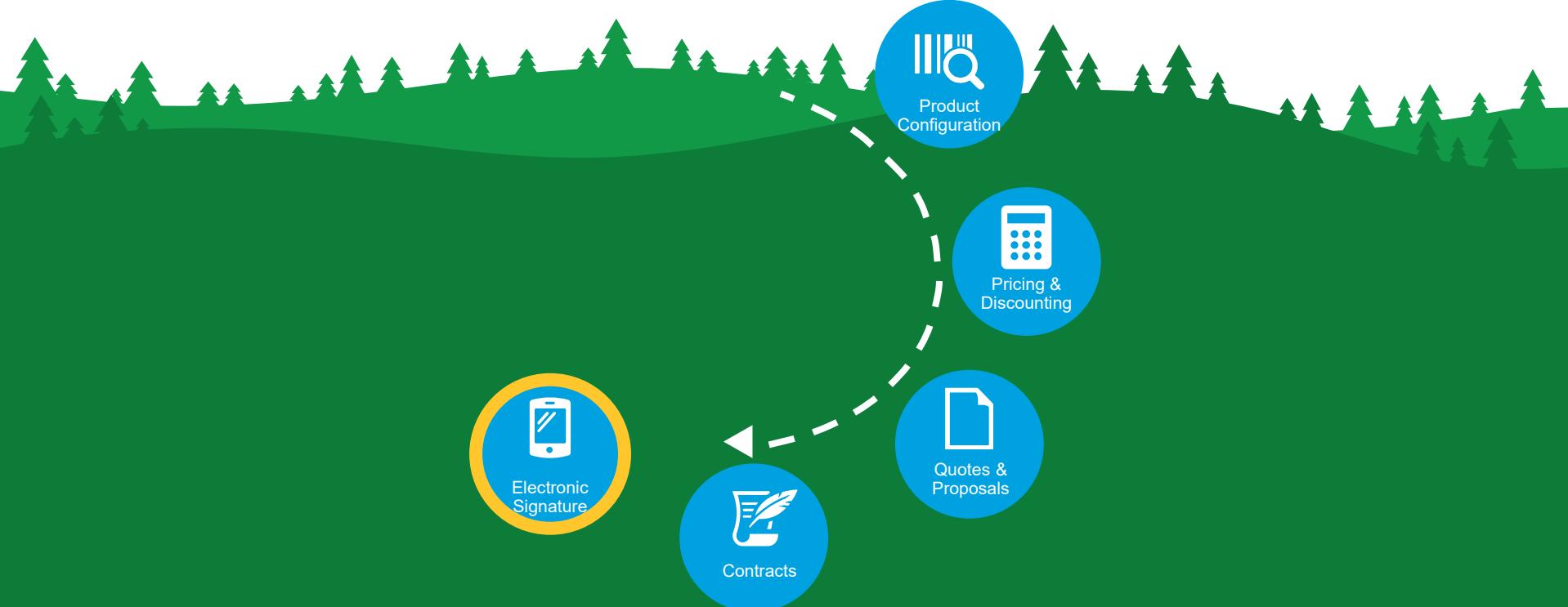
Entire Customer Sales Cycle on Single Platform



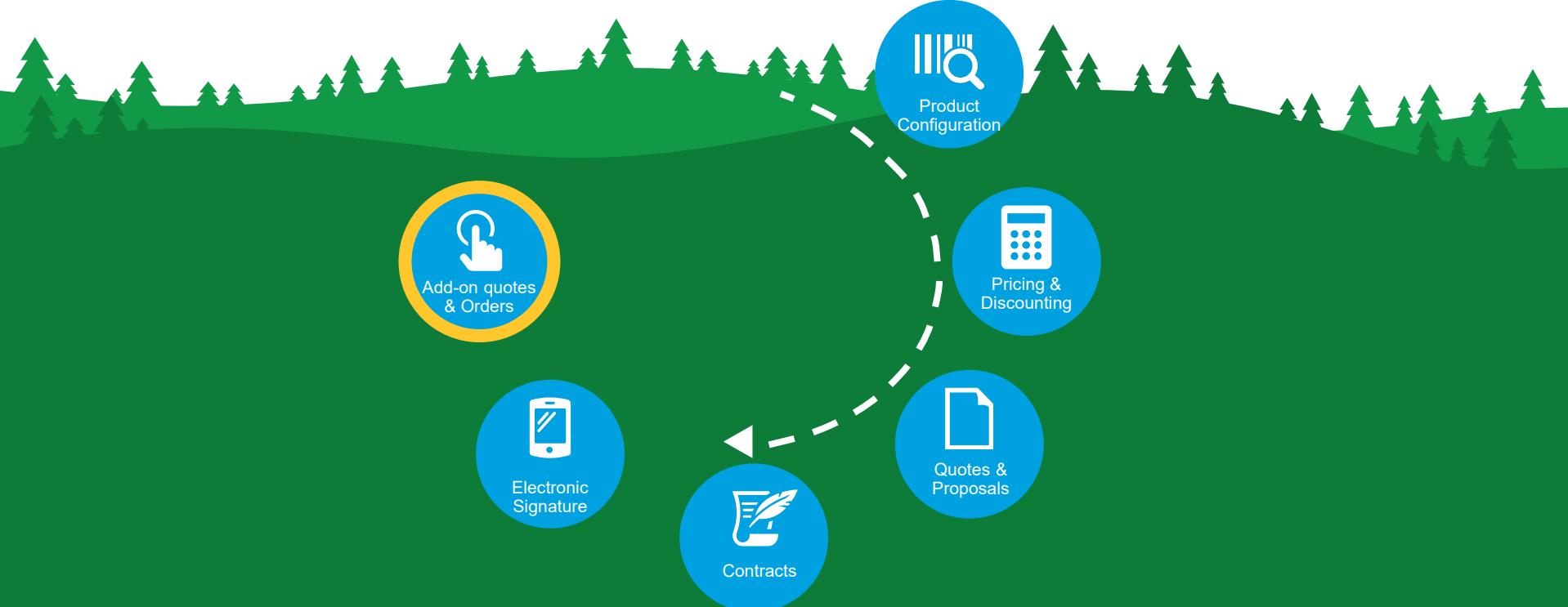
Entire Customer Sales Cycle on Single Platform



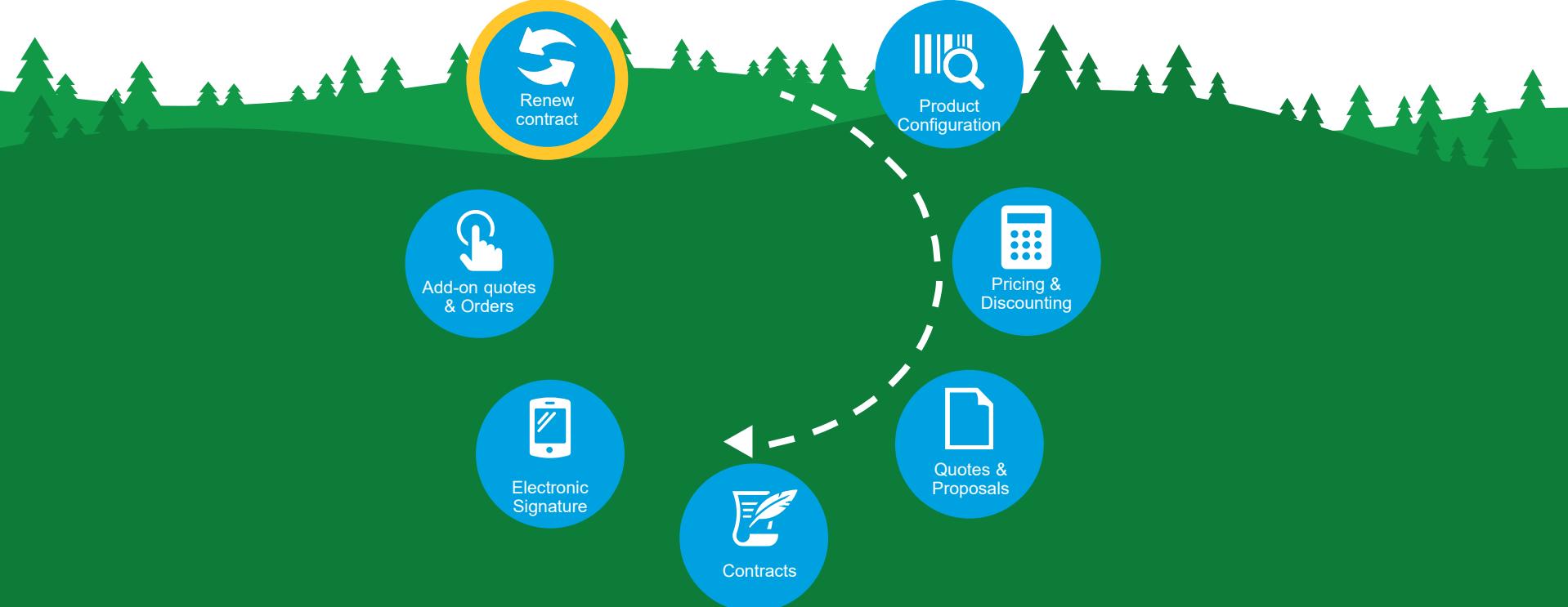
Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Earn your Salesforce CPQ Specialist Certification

Fast Track



[Certification Exam Guide](#)

SALESFORCE CERTIFIED CPQ SPECIALIST

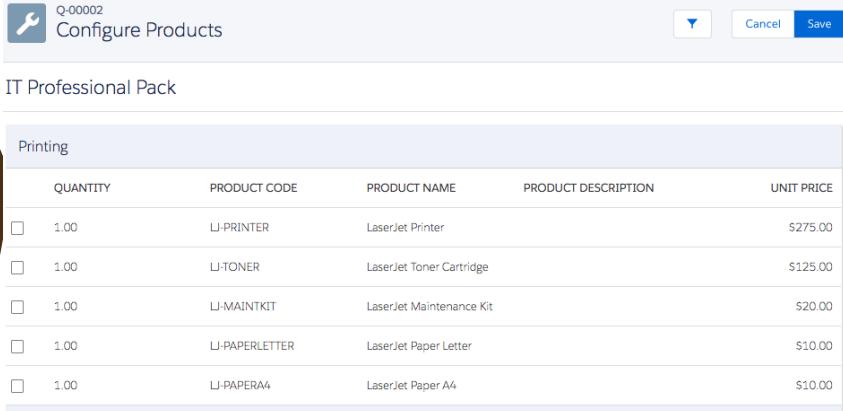
Summer '17

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Login to your Salesforce CPQ Training Org

Fast Track



The screenshot shows a Salesforce CPQ configuration page titled "Q-00002 Configure Products". The page header includes a wrench icon, a dropdown menu, and "Cancel" and "Save" buttons. Below the header, the title "IT Professional Pack" is displayed. A section titled "Printing" contains a table with five rows of product configurations:

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00	LJ-PRINTER	LaserJet Printer		\$275.00
<input type="checkbox"/> 1.00	LJ-TONER	LaserJet Toner Cartridge		\$125.00
<input type="checkbox"/> 1.00	LJ-MAINTKIT	LaserJet Maintenance Kit		\$20.00
<input type="checkbox"/> 1.00	LJ-PAPERLETTER	LaserJet Paper Letter		\$10.00
<input type="checkbox"/> 1.00	LJ-PAPERA4	LaserJet Paper A4		\$10.00

View Package Settings for Advanced Calculator

Implementation Process Overview

SteelBrick CPQ Settings

Save Cancel



Further setup is required by an administrator. Go to SteelBrick CPQ Settings > Pricing and Calculation and authorize the new calculation service.

Documents Groups Line Editor Plugins **Pricing and Calculation** Subscript

Currency Symbol

Use Ina

Unit Price Scale

Calculate Ir

Enable Quick Calculate

Disable E
Calculat

Use Legacy Calculator

Authorize new calculation service



Allow Access?

SteelBrick CPQ is asking to:

- Access your basic information
- Access and manage your data
- Perform requests on your behalf at any time

Do you want to allow access for

brian@cloutier012015.com? (Not you?)

Deny

Allow

To revoke access at any time, go to your personal settings.



Create Sample Salesforce CPQ Quote

Implementation Process Overview

Create an Account, Contact, and Opportunity

- Makes the records used in a standard sales cycle

Create a Quote

- Begins a quote with defined subscription properties

Add Products

- Includes a variety of subscription and one-time products

Update Quantities, Calculate, then Save

- Adjusts values to mimic a typical quote, updates fields and lists

Products

API

SE

AM

Salesforce CPQ Product Fields

Implementation Process Overview

Update Products

Product Detail

Product Name: Apple MacBook Pro Active:

Product Code: AP-MBPRO Product Family: Hardware

Salesforce CPQ Information

Pricing Method: List

Quantity Editable: (highlighted with orange box)

Non Discountable:

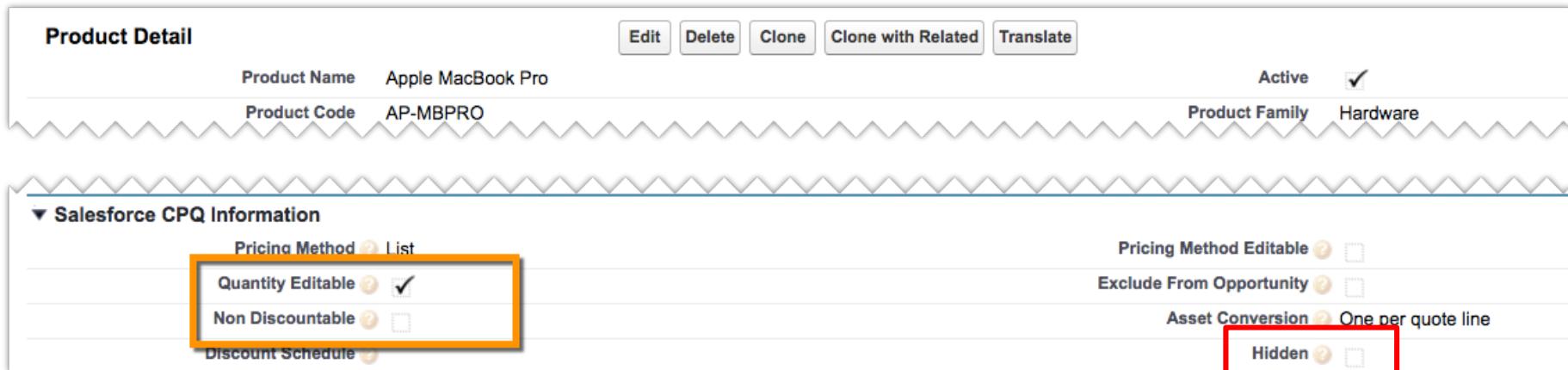
Discount Schedule:

Pricing Method Editable:

Exclude From Opportunity:

Asset Conversion: One per quote line

Hidden: (highlighted with red box)



Products Tab > Product Views & "Go" > Apple MacBook Pro

Select to exclude
bundle product from
document output

Key Concepts

Non Subscription Product Setup

- During contract creation, non subscription Products will convert to an Asset
 - Understand the difference between Asset conversion selection options
- Understand CPQ Product setting that control user input and presentation
 - Quantity Editable checkbox field
 - Non Discountable checkbox field
 - Hidden checkbox field
- Related Knowledge Base Articles:
 - [Product Managed Fields](#)



Subscription Products

Subscription Fields for Subscription Products

Implementation Process Overview

Product Detail

Product Name Microsoft Office 365 Active

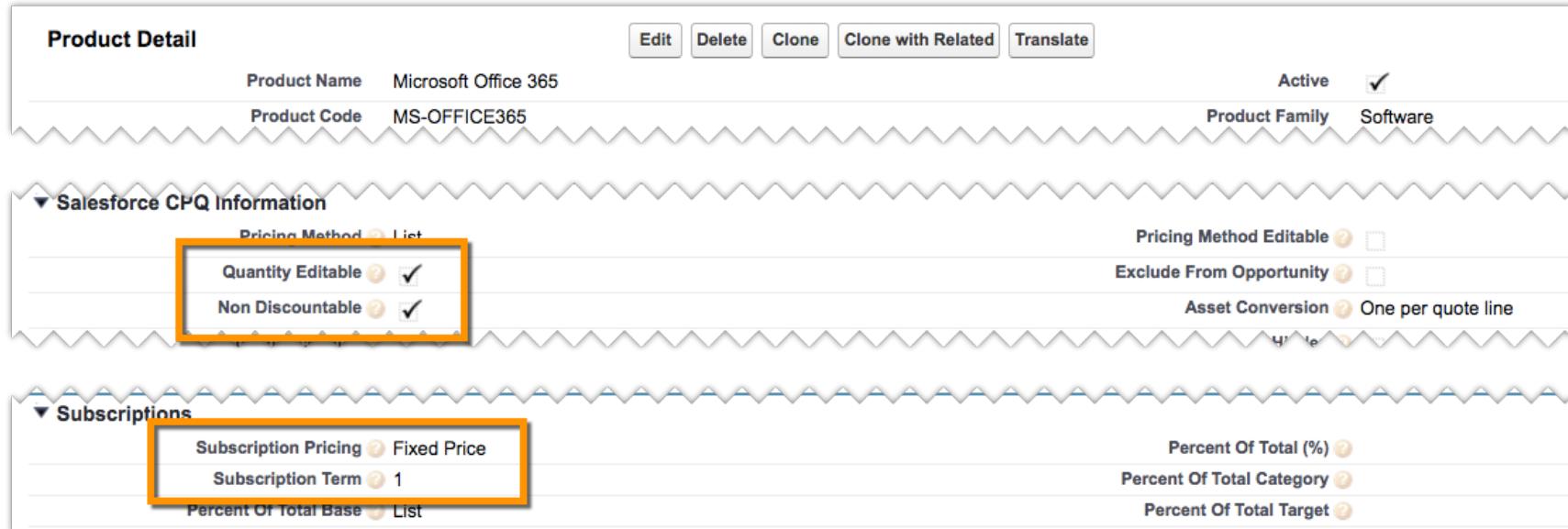
Product Code MS-OFFICE365 Product Family Software

Salesforce CPQ Information

Pricing Method List Pricing Method Editable
Quantity Editable Exclude From Opportunity
Non Discountable Asset Conversion One per quote line
 All

Subscriptions

Subscription Pricing Fixed Price Percent Of Total (%)
Subscription Term 1 Percent Of Total Category
Percent Of Total Base List Percent Of Total Target



Products Tab> Product Views & "Go"> Microsoft Office 365

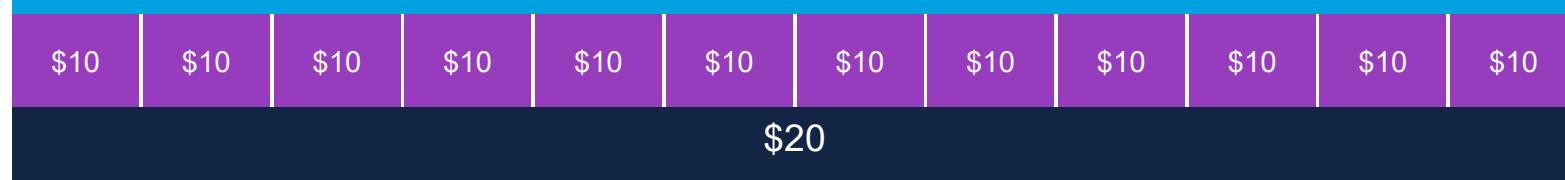


Subscription Term

Product Subscription Term & Quote/Quote Line Subscription Term

Subscription Product	Product's Subscription Term	Price	Total
MS Office 365	1 month	\$10	\$120
Cloud Storage	12 months	\$20	\$20

Quote's Subscription Term = 12



= \$120

= \$20

Subscription Term & Proration

Subscription Product	Quote's Subscription Term	Product's Subscription Term	Prorate Multiplier	Price	Total
MS Office 365	6 months	1 month	$6 / 1 = 6$	\$10	\$60
Cloud Storage	6 months	12 months	$6 / 12 = 0.5$	\$20	\$10

Quote's Subscription Term = 6

\$10 | \$10 | \$10 | \$10 | \$10 | \$10

= \$60

$\$20 \times 0.5$

= \$10

View Package Settings for Subscription Products

Implementation Process Overview

Settings Editor
Salesforce CPQ

Save Cancel

Documents	Groups	Line Editor	Plugins	Pricing and Calculation	Subscriptions and Renewals	Quote	Order	Additional Settings
Renewal Model	Contract Based	Disable Add Subscriptions						
Allow Renewal Quotes Without Assets	Subscription Term Unit	Month						
Subscription Prorate Precision	Month	Include Net-new Products in Maintenance						
Contract In Foreground	Re-evaluate Bundle Logic on Renewals							

Subscription Prorate Precision is highlighted with an orange box.

Subscription Term Unit is highlighted with an orange box.

Setup>Installed Packages>Salesforce CPQ: Configure>Subscriptions and Renewals



Key Concepts

Subscription Product Setup

- During contract creation, subscription Products will convert to Subscription records
- Understand product settings to set up a subscription product
 - Subscription Pricing: Fixed
 - Subscription Term (in months)
 - Difference between monthly and yearly term settings
 - Subscription Type (Renewable or One-time)
- Related Knowledge Base Articles:
 - [Product Managed Fields](#)



Percent of Total (POT) Subscription Products

Subscription Fields for Percent of Total Products (POT)

Implementation Process Overview

Product Detail

Product Name: Loss and Damage Warranty
Product Code: LDWARRANTY
Active:
Product Family: Support

Salesforce CPQ Information

Pricing Method: List
Quantity Editable: (highlighted)
Non Discountable: (highlighted)

Pricing Method Editable:
Exclude From Opportunity:
Asset Conversion: One per quote line

Subscriptions

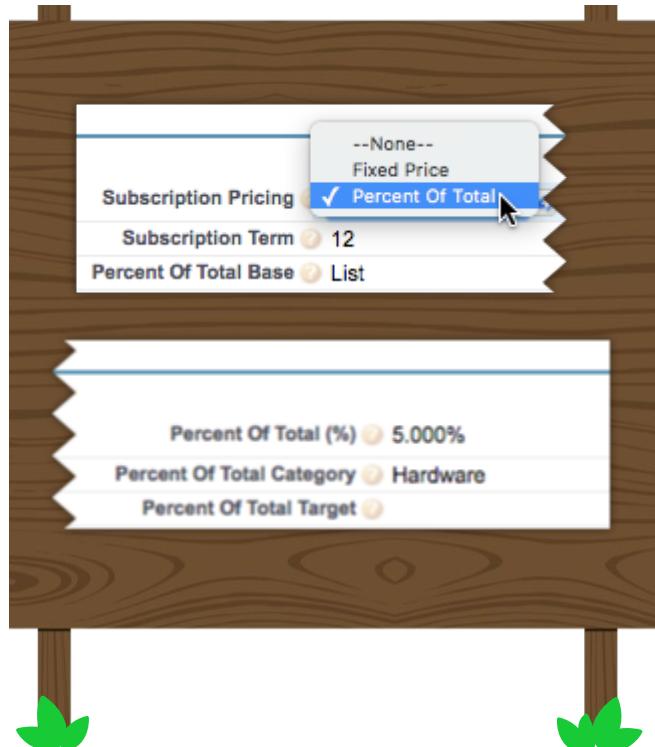
Subscription Pricing: Percent Of Total
Subscription Term: 12
Percent Of Total Base: LIST
Subscription Type: Renewable

Percent Of Total (%): 5.000%
Percent Of Total Category: Hardware
Include In Percent Of Total:
Exclude From Percent Of Total:

Products Tab > Product Views & "Go" > Loss and Damage Warranty

Subscription Pricing

Percent of Total



End-User Experience



#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE
1	AP-MAGICMOUSE	Apple Magic Mouse	1.00	\$80.00
2	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00
3	LJ-PAPERLETTER	LaserJet Paper Letter	1.00	\$10.00
4	LJ-PRINTER	LaserJet Printer	1.00	\$275.00
5	LDWARRANTY	Loss and Damage Warranty	1.00	\$63.75

Products Tab > Product Views & Go > Loss and Damage Warranty

Key Concepts

Subscription Percent of Total Product Setup

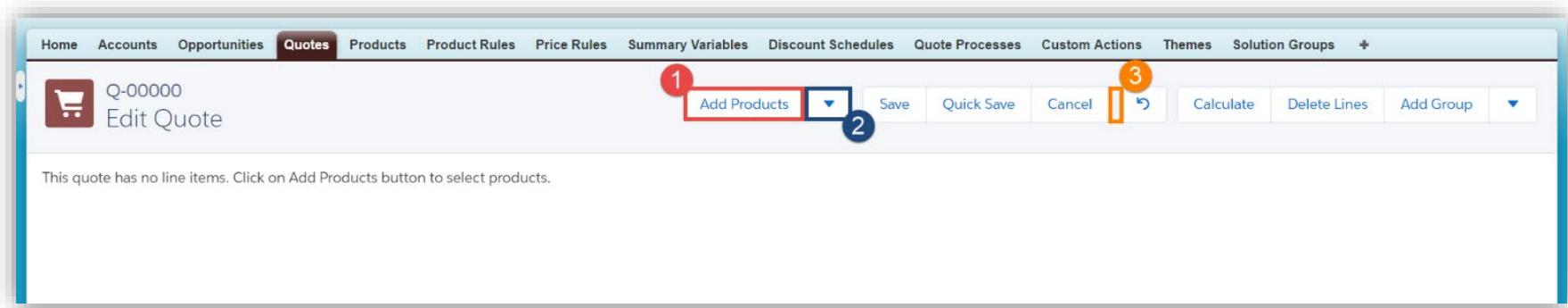
- During contract creation, subscription Products will convert to Subscription records
- Understand product settings to set up a percent of total subscription product
 - Subscription Pricing: Percent of Total
 - Percent of Total (%)
 - Percent of Total Category
- Related Knowledge Base Articles:
 - [Subscription Pricing](#)
 - [Percent of Total Pricing](#)



Custom Actions

What are Custom Actions?

1. Buttons
2. Menus
3. Separators



Custom Actions – Configuration

Demo

Salesforce screenshot showing the configuration of a product quote.

The top navigation bar includes: Home, Accounts, Opportunities, Quotes (selected), Products, Product Rules, Price Rules, Summary Variables, Discount Schedules, Quote Processes, Custom Actions, Themes, Solution Groups, and a plus sign.

The main area shows a quote header: Q-00000, Configure Products. It includes a wrench icon, a dropdown arrow, and Save/Cancel buttons.

A table lists products for an Apple MacBook Pro:

Processor				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="radio"/> 1.00	CPU22GHZI7	CPU 2.2GHz i7		\$125.00
<input type="radio"/> 1.00	CPU25GHZI7	CPU 2.5GHz i7		\$100.00
<input type="radio"/> 1.00	CPU28GHZI7	CPU 2.8GHz i7		\$250.00



Custom Actions – Quote Line Editor

Demo

Page Quote Line Editor
Location Quote
Action Save

Home Accounts Opportunities **Quotes** Products Product Rules Price Rules Summary Variables Discount Schedules Quote Processes Custom Actions Themes Solution Groups +

Q-00000
Edit Quote

Add Products ▾ Save Quick Save Cancel ↺ Calculate Delete Lines Add Group ▾

This quote has no line items. Click on Add Products button to select products.



Custom Actions – Quote Line Groups

Demo

Page Quote Line Editor
Location Quote/Group
Action Add Products

The screenshot shows the Salesforce Quotes page with two quote line groups, Group1 and Group2. Each group has an 'Add Products' button highlighted with a blue arrow. The page includes a navigation bar with Home, Accounts, Opportunities, Quotes, Products, Product Rules, Price Rules, Summary Variables, Discount Schedules, Quote Processes, Custom Actions, Themes, Solution Groups, and a plus sign. The Quotes tab is selected. The main area shows a quote with ID Q-00000 and an Edit Quote button. Group1 and Group2 each have a star icon, a group name, a description placeholder, and a note about adding products or dragging lines from other groups. There are also 'Optional' and 'Subscription Term' fields.



Add Hardware Products Custom Action Use Case

Q-00009

Quote Line Editor

Add Hardware Add Products Save Quick Save Cancel

Calculate Delete Lines Add Group

Q-00009

Product Selection

24 Products Found

<input type="checkbox"/> PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input type="checkbox"/> AP-MAGICMOUSE	Apple Magic Mouse	Hardware		\$80.00
<input type="checkbox"/> AP-MB	Apple MacBook	Hardware	12" Apple MacBook (2016)	\$1,000.00
<input type="checkbox"/> AP-MBAIR	Apple MacBook Air	Hardware	13" Apple MacBook Air (2016)	\$1,300.00
<input type="checkbox"/> AP-MBPRO	Apple MacBook Pro	Hardware	15" Apple MacBook Pro (2016)	\$1,500.00
<input type="checkbox"/> AP-TBDISPLAY	Apple Thunderbolt Display	Hardware		\$1,000.00

Filter

Product Name

Product Code

Apply Clear Fields



Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

- Defines where/how the new button appears and what action it performs

Create Search Filters

- Filters determine how users refine their searches for products

Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

- Defines where/how the new button appears and what action it performs

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- Filters determine how users refine their searches for products



Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

- Defines where/how the new button appears and what action it performs

Create Search Filters

- Filters determine how users refine their searches for products

Add Hardware Products Custom Action

Implementation Process Overview

Create Custom Action Record

Information	
Name	Add Hardware
Display Order	10
Type	Button
Parent Custom Action	
Active <input checked="" type="checkbox"/>	
Default <input type="checkbox"/>	
URL Target	--None--
URL	
Layout	
Page	Quote Line Editor
Location	Quote/Group
Action	Add Products
Icon --None--	
Label Add Hardware	
Description	

Open the Force.com Quick Access Menu to add Label



Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

- Defines where/how the new button appears and what action it performs

Create Search Filters

- Filters determine how users refine their searches for products

Add Hardware Products Custom Action

Implementation Process Overview

Create first two Search Filters

Information ■ = Required Information

<p>Filter Name <input type="text" value="Product Name"/> ■</p> <p>Target Object <input type="text" value="Product"/> ? <input type="button" value="▼"/></p> <p>Target Field <input type="text" value="Name"/> ? <input type="button" value="▼"/> i</p> <p>Operator <input type="text" value="contains"/> ? <input type="button" value="▼"/></p>	<p>Display Order <input type="text" value="10"/> ■</p> <p>Filter Value <input type="text"/> ? <input type="checkbox"/></p> <p>Hidden ? <input type="checkbox"/></p> <p>Action <input type="text" value="Add Hardware"/> 🔍</p>
---	--

Information ■ = Required Information

<p>Filter Name <input type="text" value="Product Code"/> ■</p> <p>Target Object <input type="text" value="Product"/> ? <input type="button" value="▼"/></p> <p>Target Field <input type="text" value="Product Code"/> ? <input type="button" value="▼"/> i</p> <p>Operator <input type="text" value="starts with"/> ? <input type="button" value="▼"/></p>	<p>Display Order <input type="text" value="20"/> ■</p> <p>Filter Value <input type="text"/> ? <input type="checkbox"/></p> <p>Hidden ? <input type="checkbox"/></p> <p>Action <input type="text" value="Add Hardware"/> 🔍</p>
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Hardware Products Custom Action

Implementation Process Overview

Create third Search Filter

Information		■ = Required Information
<div style="border: 2px solid orange; padding: 5px;"><p>Filter Name ■ Product Family</p><p>Target Object ■ Product</p><p>Target Field ■ Product Family</p><p>Operator ■ equals</p></div>		
<div style="border: 2px solid orange; padding: 5px;"><p>Display Order ■ 30</p><p>Filter Value ■ Hardware</p><p>Hidden ■ <input checked="" type="checkbox"/></p><p>Action ■ Add Hardware </p></div>		
<p>Prevents search filter from UI</p>		



EX: Add Hardware Products Custom Action

Q-00009

Quote Line Editor

Add Hardware Add Products Save Quick Save Cancel

Calculate Delete Lines Add Group

Q-00009

Product Selection

24 Products Found

<input type="checkbox"/> PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input type="checkbox"/> AP-MAGICMOUSE	Apple Magic Mouse	Hardware		\$80.00
<input type="checkbox"/> AP-MB	Apple MacBook	Hardware	12" Apple MacBook (2016)	\$1,000.00
<input type="checkbox"/> AP-MBAIR	Apple MacBook Air	Hardware	13" Apple MacBook Air (2016)	\$1,300.00
<input type="checkbox"/> AP-MBPRO	Apple MacBook Pro	Hardware	15" Apple MacBook Pro (2016)	\$1,500.00
<input type="checkbox"/> AP-TBDISPLAY	Apple Thunderbolt Display	Hardware		\$1,000.00

Filter Product Name Product Code



Dynamic Custom Action – New Business Quote

Implementation Process Overview

Quote Number	Q-00003	Opportunity	New Biz
Primary	<input checked="" type="checkbox"/>	Net Amount	\$0.00
Status	Draft	Customer Amount	\$0.00
Expires On	3/1/2017	Regular Amount	\$0.00
Sales Rep	Nicholas Thoryk	List Amount	\$0.00
Primary Contact		Type	Quote
Subscription Term	12	Payment Terms	Net 30
Delivery Method		Start Date	2/18/2017
Master Contract		Quote Process Id	
Approval Status			
Submitted Date			
Include Bundles	<input checked="" type="checkbox"/>		

▼ Discount Information

Additional Disc. (%)		Partner Discount	
Avg. Customer Disc. (%)	0.0%	Avg. Partner Disc. (%)	0.0%
Total Customer Disc. Amount	\$0.00	Addl. Disc. Amount	\$0.00

New quotes will ONLY include bundles in Product Selection

Stand-alone products will NOT be included



Dynamic Custom Action – Non-New Business Quote

Implementation Process Overview

Quote Number	Q-00003	Opportunity	New Biz
Primary	<input checked="" type="checkbox"/>	Net Amount	\$0.00
Status	Draft	Customer Amount	\$0.00
Expires On	3/1/2017	Regular Amount	\$0.00
Sales Rep	Nicholas Thoryk	List Amount	\$0.00
Primary Contact	<input type="checkbox"/>	Type	Amendment
Subscription Term	12	Payment Terms	Net 30
Delivery Method	<input type="checkbox"/>	Start Date	2/18/2017
Master Contract	<input type="checkbox"/>	Quote Process Id	<input type="checkbox"/>
Approval Status			
Submitted Date			
Include Bundles	<input type="checkbox"/>		

Discount Information

Additional Disc. (%)	<input type="checkbox"/>	Partner Discount	<input type="checkbox"/>
Avg. Customer Disc. (%)	0.0%	Avg. Partner Disc. (%)	0.0%
Total Customer Disc. Amount	\$0.00	Addl. Disc. Amount	\$0.00

Quote Options

Group Line Items	<input type="checkbox"/>	Print Line Items	<input checked="" type="checkbox"/>
------------------	--------------------------	------------------	-------------------------------------

Amendment & Renewal quotes will NOT include bundles in Product Selection
ONLY stand-alone products will be included



Dynamic Custom Action

Implementation Process Overview

Create Custom Action

- Makes new Add Products button available for product selection

Create Product formula field

- Makes Is Bundle field to identify which products are bundles

Create Quote formula field

- Makes field to determine if bundles or non-bundles are shown

Create Search Filters

- Create standard filters along with a dynamic filter based on Quote Type



Dynamic Custom Action

Implementation Process Overview

Create Custom Action

- Makes new Add Products button available for product selection

Create Product formula field

- Makes Is Bundle field to identify which products are bundles

Create Quote formula field

- Makes field to determine if bundles or non-bundles are shown

Create Search Filters

- Create standard filters along with a dynamic filter based on Quote Type



Dynamic Custom Action

Implementation Process Overview

Create Custom Action

The screenshot shows the 'Custom Action' page in Salesforce, specifically for creating a 'Dynamic' custom action named 'Add Products (Dynamic)'. The page is divided into several sections:

- Custom Action Detail:** This section contains basic information about the custom action.
 - Name:** Add Products (Dynamic)
 - Display Order:** 20
 - Type:** Button
- Active:**
- Default:**
- Brand Button:**
- URL Target:**
- URL:** [Link]
- Layout:** This section defines where the custom action will appear.
 - Page:** Quote Line Editor
 - Location:** Quote/Group
 - Action:** Add Products
- Created By:** Admin User, 4/30/2017 10:07 PM
- Last Modified By:** Admin User, 4/30/2017 10:07 PM

Key fields highlighted with orange boxes include: Name, Active, Location, and Label.



Exercise: Hardware Products Custom Action



Key Concepts

Custom Actions and Search Filters

- Great way to quickly show a subset of products
- Custom Actions assembly process
 - Hidden checkbox prevents field from showing on UI
- Be aware that
 - Custom Actions can be dynamic
 - Search Filters can be conditional
- Related Knowledge Base Articles:
 - [Custom Actions](#)
 - [Search Filters](#)

Bundles

API

SP

5

AM

Product Bundles Overview

A collection of products that are sold together

Assists sales reps while enforcing business logic

- Required products
- Min/max selections
- Quantity relationships

Example Bundle

- Product A
- Product B
- Product C
- Product D (2x)
- Product E
- Product F
- Product G
- Product H
- Product I

Product Bundles Overview

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL CHARGES	NET TOTAL	Actions
1	AP-MBPRO	Apple MacBook Pro	1.00	\$1,500.00		\$1,050.00	 
2	CPU28GHZI7	CPU 2.8GHz i7	1.00	\$250.00		\$175.00	
3	RAM16GB	RAM 16GB	1.00	\$125.00		\$87.50	
4	SSD512	SSD Hard Drive 512GB	1.00	\$150.00		\$105.00	
5	ITPROPACK	IT Professional Pack	1.00	\$0.00		\$0.00	  
6	LJ-PRINTER	LaserJet Printer	6.00	\$275.00		\$840.00	 
7	LJ-TONER	LaserJet Toner Cartridge	12.00	\$125.00		\$1,029.00	 
8	LJ-MAINTKIT	LaserJet Maintenance Kit	12.00	\$20.00		\$164.64	 
9	LJ-PAPERLETTER	LaserJet Paper Letter	12.00	\$10.00		\$98.76	 
						\$3,549.90	

Key Concepts

Product Bundle setup

- Understand Type/Event settings that prevents/allows initial configuration and reconfiguration
 - Note: unchecking the active checkbox on “Reconfigure Line” custom action can also disable reconfiguration
- Related Knowledge Base Articles:
 - [Setting Configuration Type](#)
 - [Product Managed Fields](#)



Features

API

SI

AM

Watch and Learn

IT PRO PACK Printing Feature and Options have been built out

Q-00002
Configure Products ▼ Cancel Save

IT Professional Pack

Printing				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00	LJ-PRINTER	LaserJet Printer		\$275.00
<input type="checkbox"/> 1.00	LJ-TONER	LaserJet Toner Cartridge		\$125.00
<input type="checkbox"/> 1.00	LJ-MAINTKIT	LaserJet Maintenance Kit		\$20.00
<input type="checkbox"/> 1.00	LJ-PAPERLETTER	LaserJet Paper Letter		\$10.00
<input type="checkbox"/> 1.00	LJ-PAPERA4	LaserJet Paper A4		\$10.00

Product Bundles Defined

Bundles are for items that need to be included together or have optional features, comprised of:

Object	Description
Products	A separate product is created that contains the bundled products.
Options	Additional products in the bundle(s) that contributes to the bundle's package price. They can be associated with features and define how the different components behave in relation to configuration, pricing and constraints.
Features	Categories of options. Options of the same feature may have several constraints, such as <i>pick one more</i> and <i>pick 2 of 5</i> .
Option Constraints	Constraints placed on products defined in the Options related list. They control which options may or may not be purchased together.

Feature Fields

Field	Description
Name	Enter a meaningful name for the feature to be listed in the bundle.
Number	Enter a sequential number that determines how the features are sorted in the related list on the product.
Configured SKU	Name of the product bundle that includes this feature. <i>If you created the feature from the product detail page, this should already be populated.</i>
Min Options	Enter the minimum number of options for this feature that must be part of the product bundle.
Max Options	Enter the maximum number of options for this feature that can be selected as part of the product bundle. Leave blank if there is no limit.

Key Concepts

Feature setup

- Understand how the Number field controls feature order
- Understand how the Min/Max functions control user selection
 - Setting Max = 1 will display radio buttons instead of checkboxes
- Category setting allows for another level of organization with a feature
- Related Knowledge Base Articles:
 - [Product Features](#)
 - [Use Radio Buttons in Configuration](#)



Product Options

AB

SE

AM

Watch and Learn

IT PRO PACK Printing Feature and Options have been built out

Features		New Product Feature	Features Help		
Action	Feature Name	Min Options	Max Options	Number	
Edit Del	Computers	0		10	
Edit Del	Peripherals	0		10	
Edit Del	Printing	0		30	
Edit Del	Networking	0		40	
Edit Del	Subscriptions	0		50	

Options		New Product Option	Options Help					
Action	Option Name	Number	Optional SKU	Feature	Type	Min Quantity	Max Quantity	Price Editable
Edit Del	PO-000079	10	LaserJet Printer	Printing	Accessory			No
Edit Del	PO-000080	20	LaserJet Toner Cartridge	Printing	Accessory			No
Edit Del	PO-000081	30	LaserJet Maintenance Kit	Printing	Accessory			No
Edit Del	PO-000082	40	LaserJet Paper Letter	Printing	Related Product			No
Edit Del	PO-000083	50	LaserJet Paper A4	Printing	Related Product			No

Options Fields

Field	Description
Optional SKU	Lookup the product SKU that is added when the product bundle is selected.
Bundled	Select to indicate that the related product is bundled with the main product.
Required	Select if the product is required in the bundle.
Selected	Select if the product option should be automatically selected by default.
Type	<ul style="list-style-type: none">• Component: Choose if this option, including quantity, is dependent on its parent, and that quantity should be multiplied by the quantity of the bundle.• Accessory: Choose if this option is dependent on the parent, but the quantity is independent. For example, when a user enters a quantity for the product option, it will remain the same even if the quantity of the bundle changes.• Related Product: Choose if this option is related, but fully independent products. Use this for cross-sell or upsell product options that users can add to the bundle, yet control the quantity independently.• None: Choose if the option should be treated like a component when it is part of the feature. If it is not part of a bundle, its quantity is independent.

Options Fields

Field	Description
Percent of Total Scope	<p>Choose how this dynamic subscription determines target product set if you want to further restrict percent-of-total calculations. Select an option:</p> <ul style="list-style-type: none">• Package: Limits calculations for percent of total to the bundle itself, not its components.• Components: Limits calculations for percent of total to the components, but not the bundle parenting it.• Both: Includes both the bundle and component prices in percent of total calculations.

Option Types for MacBook Pro

	Component	Accessory	Related Product
Functionally dependent?	Yes	Yes	No
Relationship to parent quantity?	Proportional	Independent	Independent
Quantity Editable in Quote Line Editor?	No	No	Yes
Example	2.2 ghz Processor	Warranty	Microsoft Office 365

Option Types Illustrated

Q-00012
Configure Products ▼ Cancel Save

IT Professional Pack

Location: -None-- ▾

Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00

Subscriptions				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	WARRANTY	Warranty		\$0.00
<input type="checkbox"/> 1.00	LDWARRANTY	Loss and Damage Warranty		\$0.00
<input checked="" type="checkbox"/> 1.00	MS-OFFICE365	Microsoft Office 365		\$10.00
<input type="checkbox"/> 1.00	CLOUDSTORAGE	Cloud Storage 1GB		\$20.00
<input type="checkbox"/> 20.00	ADMINHOUR	Admin Hour		\$75.00

Option Types Illustrated

 Q-00012
Edit Quote

[Add Hardware](#)
[Add Products](#)
▼
[Add Group](#)
[Delete Lines](#)
↶
[Quick Save](#)
[Calculate](#)
[Cancel](#)
Save

Quote Information

Start Date 9/27/2017 
Subscription Term 36 
Target Customer Amount 

Quote Line View --None-- 

<input type="checkbox"/> #	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	PACKAGE TOTAL	   
<input type="checkbox"/> 1	ITPROPACK	▼ IT Professional Pack	1.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,882.50	   
2	AP-MBPRO	▼ Apple MacBook Pro	1.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	\$1,500.00	
3	CPU22GHZI7	CPU 2.2GHz i7	1.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	
4	RAM8GB	RAM 8GB	1.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	
5	SSD256	SSD Hard Drive 256GB	1.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	
6	WARRANTY	Warranty	1.00	\$7.50	Type: Accessory	\$22.50	\$22.50	\$22.50	
7	MS-OFFICE365	Microsoft Office 365	1.00	\$10.00	Type: Related Product	\$360.00	\$360.00	\$360.00	
SUBTOTAL: \$1,882.50									
QUOTE TOTAL: \$1,882.50									

CONFIDENTIAL

Option Types Illustrated

Q-00012
Edit Quote

Add Hardware Add Products ▾ Add Group Delete Lines ↻ Quick Save Calculate Cancel Save

Quote Information

Start Date 9/27/2017

Subscription Term 36

Target Customer Amount

Quote Line View --None--

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	PACKAGE TOTAL	Actions
<input type="checkbox"/>	1	ITPROPACK	IT Professional Pack	1.00	\$0.00		\$0.00	\$0.00	\$4,927.50	
<input type="checkbox"/>	2	AP-MBPRO	Apple MacBook Pro	3.00	\$1,500.00		\$1,500.00	\$4,500.00	\$4,500.00	
<input type="checkbox"/>	3	CPU22GHZI7	CPU 2.2GHz i7	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	
<input type="checkbox"/>	Dependent on bundle quantity, locked			3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	
<input type="checkbox"/>	5	SSD256	SSD Hard Drive 256GB	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	
<input type="checkbox"/>	Independent on bundle quantity, locked			1.00	\$22.50	Type: Accessory	\$67.50	\$67.50	\$67.50	
<input type="checkbox"/>	7	MS-OFFICE365	Microsoft Office 365	1.00	\$10.00	Type: Related Product	\$360.00	\$360.00	\$360.00	

SUBTOTAL: \$4,927.50

QUOTE TOTAL: \$4,927.50

Option Types Illustrated

Q-00012
Edit Quote

Add Hardware Add Products ▾ Add Group Delete Lines ↻ Quick Save Calculate Cancel Save

Quote Information

Start Date 9/27/2017 Subscription Term 36 Target Customer Amount

Quote Line View --None--

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	PACKAGE TOTAL	Actions
1	ITPROPACK	IT Professional Pack	1.00	\$0.00		\$0.00	\$0.00	\$112,567.50	☆ ↗ 📁 🛍
2	AP-MBPRO	Apple MacBook Pro	3.00	\$1,500.00		\$1,500.00	\$4,500.00	\$4,500.00	ℹ
3	CPU22GHZI7	CPU 2.2GHz i7	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	ℹ
Dependent on bundle quantity, locked			3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	ℹ
5	SSD256	SSD Hard Drive 256GB	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	ℹ
Independent on bundle quantity, locked			1.00	\$22.50	Type: Accessory	\$67.50	\$67.50	\$67.50	ℹ
7	M:	Independent on bundle quantity, free to edit	300.00	\$10.00	Type: Related Product	\$108,000.00	\$108,000.00	\$108,000.00	ℹ

SUBTOTAL: \$112,567.50

QUOTE TOTAL: \$112,567.50

Build and Learn

Create remaining Options to Existing Features to the IT PRO PACK bundle

Information ■ = Required Information

Number ? <input type="text" value="10"/>	Configured SKU ? <input type="text" value="IT Professional Pack"/> x i
Quantity ? <input type="text" value="1"/>	Optional SKU ? <input type="text" value="Apple MacBook Pro"/> x i
Quantity Editable ? <input checked="" type="checkbox"/>	Feature ? <input type="text" value="Computers"/> x i
Selected ? <input checked="" type="checkbox"/>	Type ? <input type="text" value="Related Product"/> x i
Required ? <input type="checkbox"/>	Bundled ? <input type="checkbox"/>
Min Quantity ? <input type="text"/>	Unit Price ? <input type="text"/>
Max Quantity ? <input type="text"/>	Discount (%) ? <input type="text"/>
Discount Schedule ? <input type="text"/> x i	Discount (Amt) ? <input type="text"/>



Exercise

Create Options



Key Concepts

Options setup

- Understand the behaviour and differences between Option Types:
 - Component
 - Accessory
 - Related Product
- The ‘Bundled’ checkbox will show List Price as “Included” and Net Price as \$0
- The ‘Quote Line Visibility’ controls which options can show up on the Quote Document
- The ‘Apply Immediately’ will trigger rules to run after selection
- Changing Option Selection method from ‘Click’ to ‘Add’ on the bundle product collapses options and allows for an ‘Add’ link to expand



Key Concepts

Options setup (continued)

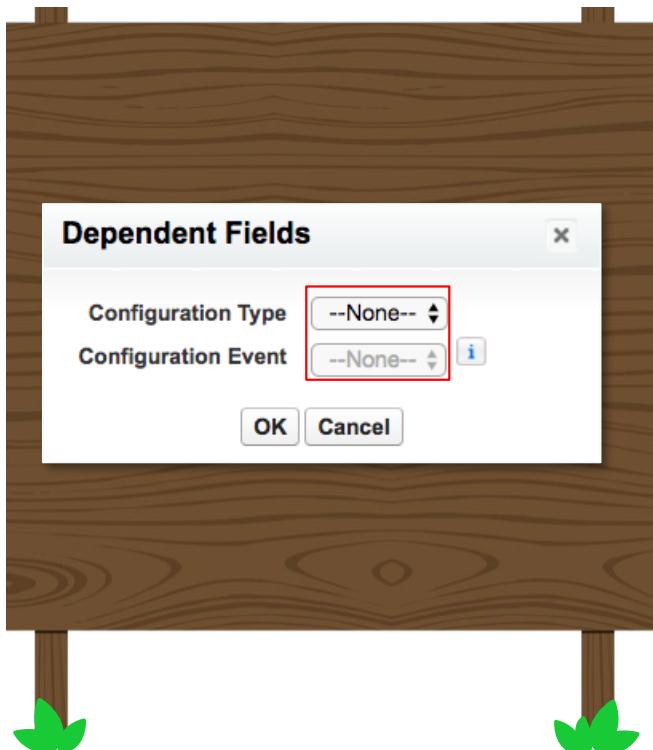
- Nested bundles: an Option's Optional SKU can reference other bundled products (ie. the MacBook Pro within the ITPROPACK bundle)
- Related Knowledge Base Articles:
 - [Product Features](#)
 - [Adding Options](#)
 - [Changing Option Selection Method](#)



Configuration Event and Configuration Type

Configuration Event Variations

Configuration Type: None, Configuration Event: None



The image shows a user interface for product selection. At the top, a blue banner reads "End-User Experience" with a cartoon character of a monkey flying a jet. Below the banner is a toolbar with buttons: "Add Products" (highlighted with a red box), Save, Quick Save, Cancel, Calculate, Delete Lines, and Add Group. A modal dialog box titled "Q-00002 Product Selection" is open. It contains a table with columns "PRODUCT CODE" and "PRODUCT". The first row shows "ITPROPACK" under "IT Professional Pack". The "Select" button in the dialog is highlighted with a red box. Other buttons in the dialog include "Select & Add More" and "Cancel".



Configuration Event Variations

Configuration Type: None, Configuration Event: None

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	DESCRIPTION	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	ITPROPACK	▼ IT Professional Pack	1.00		USD 0.00		USD 0.00	USD 0.00				
	2	AP-MBPRO	▼ Apple MacBook Pro	1.00	15" Apple MacBook Pro (2016)	USD 1,500.00		USD 1,500.00	USD 1,500.00				

Q-00004
Configure Products

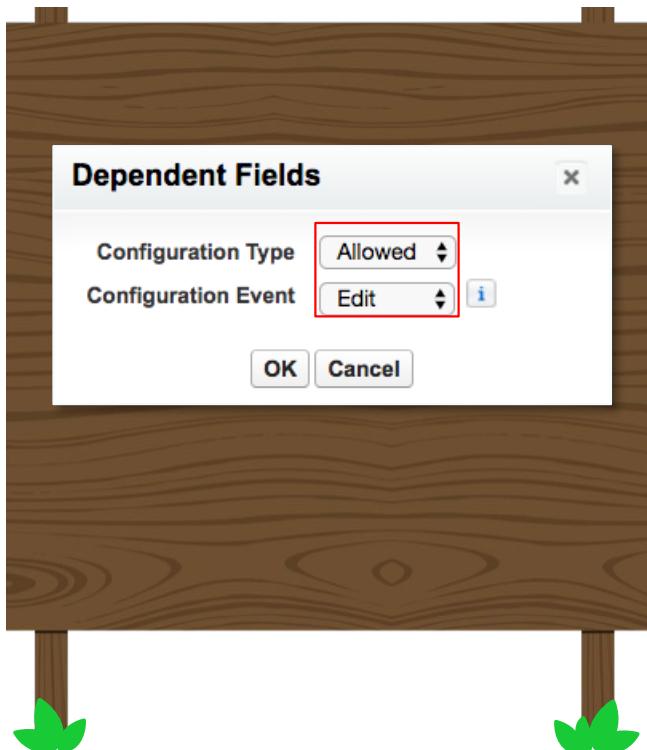
IT Professional Pack

Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	USD 1,500.00

Peripherals

Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Edit



End-User Experience

Add Products Save Quick Save Cancel Calculate Delete Lines Add Group

Q-00002 Product Selection

PRODUCT CODE	PRODUCT
<input type="checkbox"/> ITPROPACK	IT Professional Pack

Select Select & Add More Cancel



Configuration Event Variations

End-User Experience



Configuration Type: Allowed, Configuration Event: Edit

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	DESCRIPTION	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	
<input type="checkbox"/>	1	ITPROPACK	▼ IT Professional Pack	1.00		USD 0.00		USD 0.00	USD 0.00	
	2	AP-MBPRO	▼ Apple MacBook Pro	1.00	15" Apple MacBook Pro (2016)	USD 1,500.00		USD 1,500.00	USD 1,500.00	

Q-00004
Configure Products

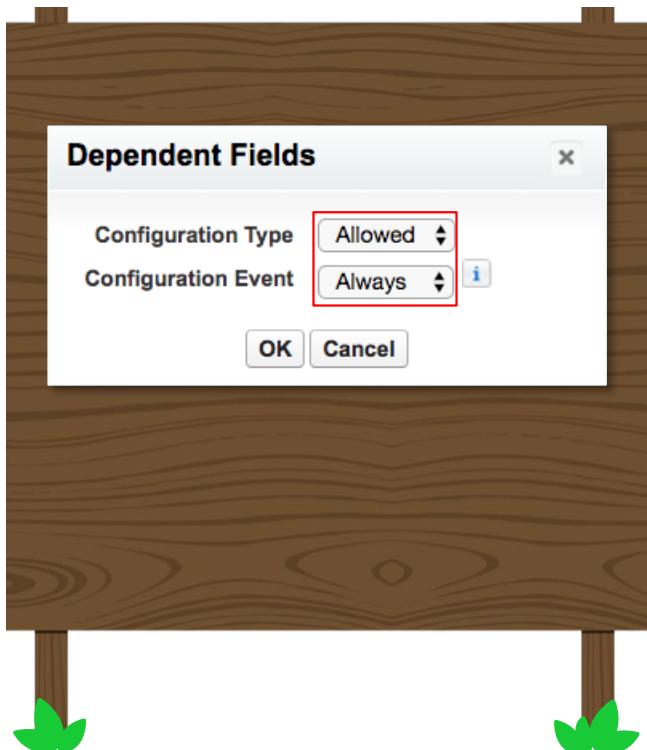
IT Professional Pack

Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	USD 1,500.00

Peripherals

Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Always



Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Always

Q-00004
Configure Products Filter

IT Professional Pack

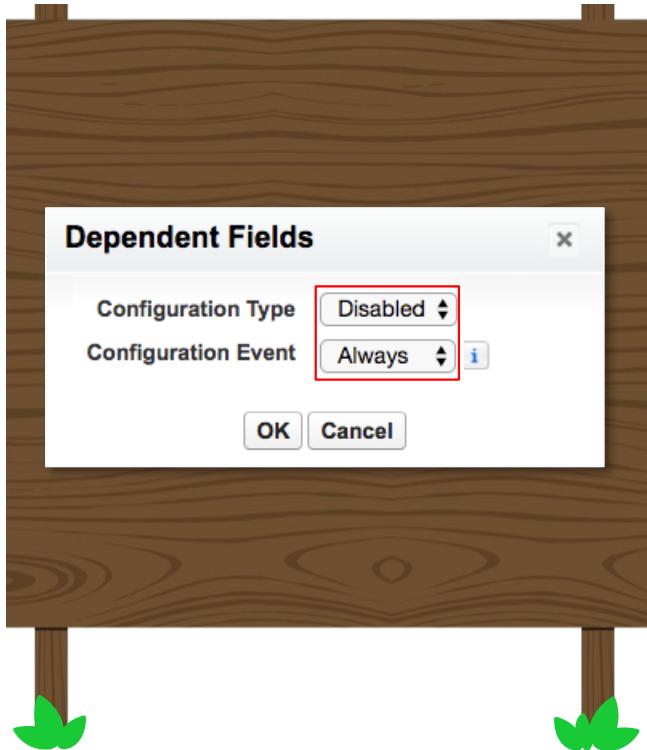
Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	USD 1,500.00

Peripherals

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	DESCRIPTION	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	Actions
1	ITPROPACK	IT Professional Pack	1.00		USD 0.00		USD 0.00	USD 0.00	
2	AP-MBPRO	Apple MacBook Pro	1.00	15" Apple MacBook Pro (2016)	USD 1,500.00		USD 1,500.00	USD 1,500.00	

Configuration Event Variations

Configuration Type: Disabled, Configuration Event: Always



End-User Experience

Add Products Save Quick Save Cancel Calculate Delete Lines Add Group

Q-00002 Product Selection

PRODUCT CODE	PRODUCT	Select	Select & Add More	Cancel
<input type="checkbox"/> ITPROPACK	IT Professional Pack	<input checked="" type="button"/> Select	Select & Add More	Cancel



Configuration Event Variations

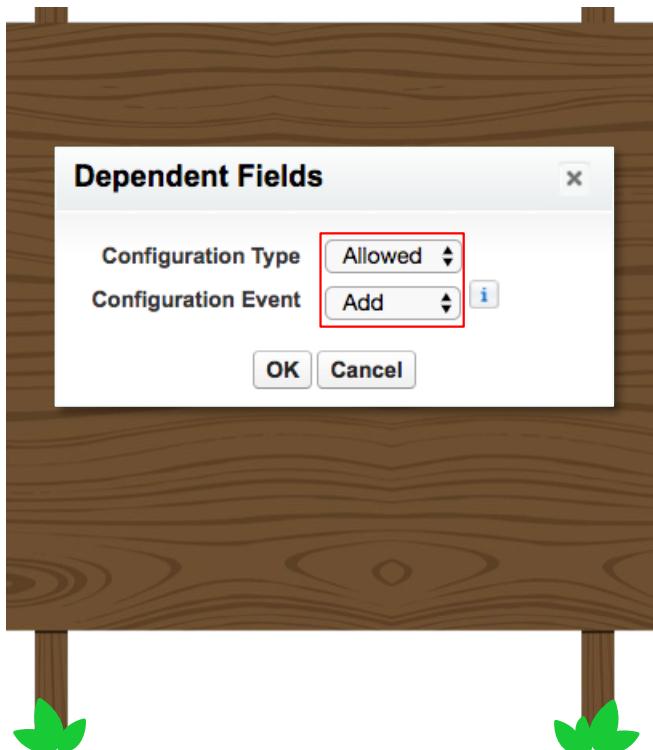
Configuration Type: Disabled, Configuration Event: Always

#	Product Code	Product Name	Quantity	Description	List Unit Price	Additional Disc.	Net Unit Price	Net Total	
1	ITPROPACK	IT Professional Pack	1.00		USD 0.00		USD 0.00	USD 0.00	  
2	AP-MBPRO	Apple MacBook Pro	1.00	15" Apple MacBook Pro (2016)	USD 1,500.00		USD 1,500.00	USD 1,500.00	



Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Add



The image shows the Salesforce user interface. At the top, a blue banner reads 'End-User Experience' with a cartoon character of a monkey wearing a jetpack. Below the banner is a toolbar with buttons: 'Add Products' (highlighted with a red box), 'Save', 'Quick Save', 'Cancel', 'Calculate', 'Delete Lines', and 'Add Group'. Below the toolbar is a 'Product Selection' dialog for item Q-00002. The dialog shows a table with columns 'PRODUCT CODE' and 'PRODUCT'. It lists 'ITPROPACK' under 'PRODUCT CODE' and 'IT Professional Pack' under 'PRODUCT'. A checkbox next to 'ITPROPACK' is checked (highlighted with a red box). At the bottom of the dialog are buttons: 'Select' (highlighted with a red box), 'Select & Add More', and 'Cancel'.



Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Add

Q-00004
Configure Products Filter

IT Professional Pack

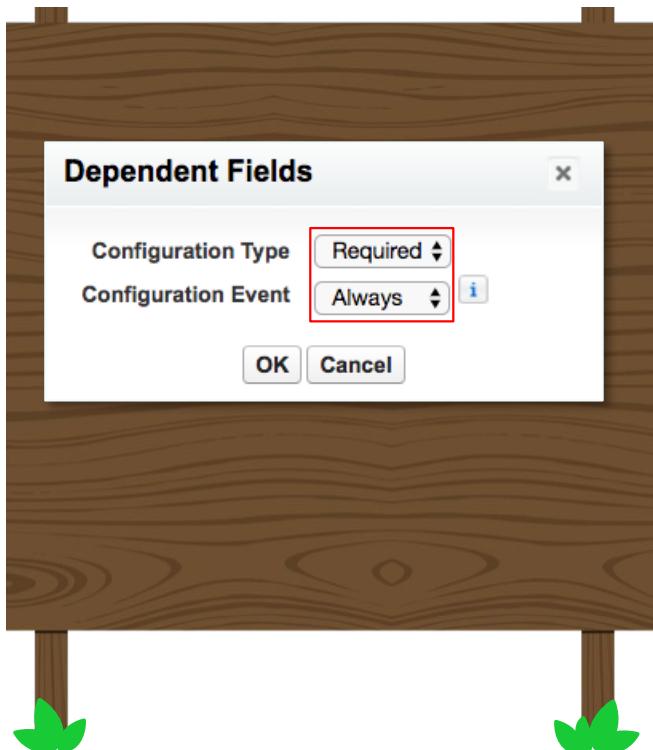
Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	USD 1,500.00

Peripherals

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	DESCRIPTION	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	Actions
1	ITPROPACK	IT Professional Pack	1.00		USD 0.00		USD 0.00	USD 0.00	
2	AP-MBPRO	Apple MacBook Pro	1.00	15" Apple MacBook Pro (2016)	USD 1,500.00		USD 1,500.00	USD 1,500.00	

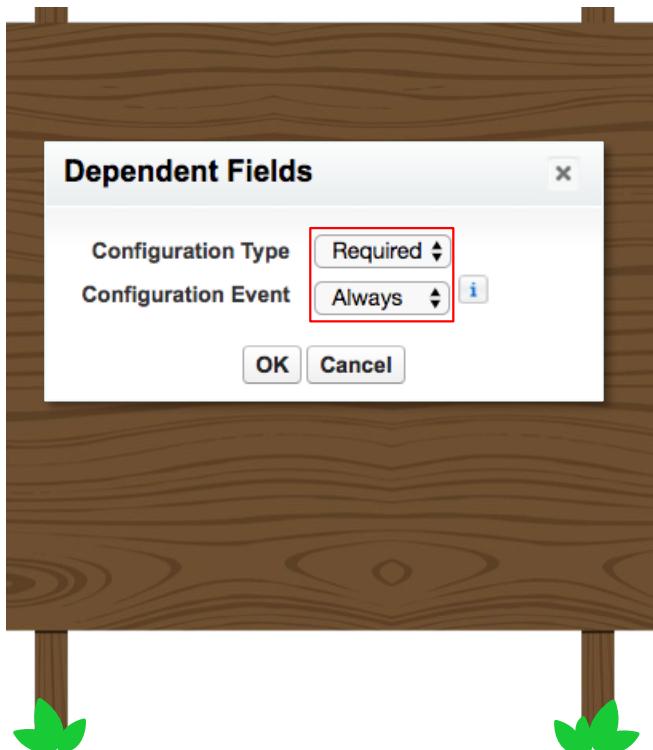
Configuration Event Variations

Configuration Type: Required, Configuration Event: Always



Configuration Event Variations

Configuration Type: Required, Configuration Event: Always



Configuration Event Variations

Configuration Type: Required, Configuration Event: Always

Q-00004
Configure Products Filter

IT Professional Pack

Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	USD 1,500.00

Peripherals

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	DESCRIPTION	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	Actions
1	ITPROPACK	IT Professional Pack	1.00		USD 0.00		USD 0.00	USD 0.00	
2	AP-MBPRO	Apple MacBook Pro	1.00	15" Apple MacBook Pro (2016)	USD 1,500.00		USD 1,500.00	USD 1,500.00	

Configuration Event Variation Summary

Configuration Type	None	Allowed	Allowed	Disabled	Allowed	Required	Allowed
Configuration Event	None	Edit	Always	Always	Add	Always	Always
Show Configuration initially?	No	No	Yes	No	Yes	Yes	Yes
Added to QLE automatically?	Yes	Yes	No	Yes	No	No	No
Able to reconfigure from QLE?	Yes	Yes	Yes	No	No	Yes	Yes
Notes	Default	Same as None/None	Used most often	Often in multi - bundle quoting	Not often used	Acts like Allowed/Always, ensures nested bundles are complete	



Configured Code Pattern

Configured Code Pattern

Example

<input type="checkbox"/> #	PRODUCT NAME	PACKAGE PRODUC...	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.
<input type="checkbox"/> 1	Apple MacBook Air	APAIR-1.6-8-128	1.00	USD 1,300.00	
2	CPU 1.6GHz i5		1.00	Included	
3	RAM 8GB		1.00	Included	
4	SSD Hard Drive 128GB		1.00	USD 50.00	

Configured Code Pattern

Update Product Field

Salesforce CPQ Configuration

Configuration Event Always	Configuration Field Set
Configuration Type Allowed	Disable Reconfiguration <input type="checkbox"/>
Option Layout	Component
Option Selection Method Click	Configured Code Pattern APAIR-{10}-{20}-{30}
	Pattern

Salesforce CPQ Renewals

Renewal Product
Edit Delete Clone Clone with Related

Features

Features		New Product Feature	Features Help	
Action	Feature Name	Min Options	Max Options	Number
Edit Del	<u>Processor</u>	1	1	10
Edit Del	<u>Memory</u>	1	1	20
Edit Del	<u>Storage</u>	1	1	30



Configured Code Pattern

Update Product Options for AP-MBAIR

▼ Optional SKU Information	
Product Code ⓘ CPU16GHZi5	Price Editable ⓘ No
Product Name ⓘ CPU 1.6GHz i5	Product Configuration Type ⓘ
Product Description ⓘ	
▼ Advanced Settings	
Component Code ⓘ 1.6	Component Code Position ⓘ 10
▼ Optional SKU Information	
Product Code ⓘ RAM16GB	Price Editable ⓘ No
Product Name ⓘ RAM 16GB	Product Configuration Type ⓘ
Product Description ⓘ	
▼ Advanced Settings	
Component Code ⓘ 16	Component Code Position ⓘ 20

Configured Code Pattern

Update Product Options for AP-MBAIR

▼ Optional SKU Information	
Product Code ⓘ RAM8GB	Price Editable ⓘ No
Product Name ⓘ RAM 8GB	Product Configuration Type ⓘ
Product Description ⓘ	
▼ Advanced Settings	
Component Code ⓘ 8	Component Code Position ⓘ 20
▼ Optional SKU Information	
Product Code ⓘ SSD128	Price Editable ⓘ No
Product Name ⓘ SSD Hard Drive 128GB	Product Configuration Type ⓘ
Product Description ⓘ	
▼ Advanced Settings	
Component Code ⓘ 128	Component Code Position ⓘ 30

Key Concepts

Configured Code Pattern

- Understand the required fields to set up dynamically generated skus
- Also be familiar with Package Product Description
- Related Knowledge Base Articles:
 - [Package Product Code](#)
 - [Package Product Description](#)



Option Constraints

Option Constraints

Q: What if you wanted to exclude one option when another one is ordered at the same time for the product bundle?

A: Create an option constraint!

Benefits:

- Used to set option dependencies and exclusions
- Can be used in real-time rule processing, which gives immediate feedback to the sales user

Constraint Use Cases

1. WiFi Installation may only be selected if WiFi Router has been selected
2. WiFi Access Point may only be selected if WiFi Router has been selected, or previously purchased
3. Only one warranty may be selected at any given time

Option Constraint Use Cases

2

1

3

Networking				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00	WIFIROUTER	WiFi Router	\$100.00
<input type="checkbox"/>	1.00	WIFIAP	WiFi Access Point	\$60.00
<input type="checkbox"/>	1.00	WIFIINSTALL	WiFi Installation	\$300.00

Subscriptions				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/>	1.00	WARRANTY	Warranty	\$0.00
<input type="checkbox"/>	1.00	LDWARRANTY	Loss and Damage Warranty	\$0.00
<input type="checkbox"/>	1.00	MS OFFICESUITE	Microsoft Office Suite	\$100.00

Option Constraint Fields

Field	Description
Constraint Name	Enter a meaningful name for the option constraint.
Constrained Option	Lookup the option in the bundle that you want applied to this constraint.
Constraining Option	Lookup the additional option, if the Constrained Option is constraining another option.
Active	Select to activate the option constraint.
Configured SKU	Enter or lookup the product bundle on which to apply this option constraint.
Type	<ul style="list-style-type: none">• Dependency: Indicates that the inclusion of an option constraint requires constraining option.• Exclusion: Indicates that the option constraint is not available if constraining option is selected and vice versa.

Build and Learn

WiFi installation requires WiFi Router

Create Option Constraint

Option for Installation

Information | = Required Information

Constraint Name	WiFi installation requires WiFi Router
Constrained Option	PO-000019
Constraining Option	PO-000017

Active |

Configured SKU | IT Professional Pack |

Type | Dependency |

Option Constraint Group |

Option for Router

Build and Learn

WiFi Access Point requires WiFi Router

Create Option Constraint

Option for Access Point

Information ■ = Required Information

Constraint Name	WiFi Access Point require WiFi Router
Constrained Option	PO-000018
Constraining Option	PO-000017
Check Prior Purchases	<input checked="" type="checkbox"/>

Active Configured SKU IT Professional Pack
Type Dependency
Option Constraint Group

Option for Router

Build and Learn

Only one warranty may be selected

Create Option Constraint

Information ■ = Required Information

Constraint Name ■ Only one warranty may be selected	Active ■ <input checked="" type="checkbox"/>
Constrained Option ■ PO-000020	Configured SKU ■ IT Professional Pack
Constraining Option ■ PO-000021	Type ■ <input type="button" value="Exclusion"/>
Check Prior Purchases <input type="checkbox"/>	

Exercise

Create Option Constraints



Option Constraint Grouping Use Case

Networking		
QUANTITY	PRODUCT CODE	PRODUCT NAME
<input checked="" type="checkbox"/>	1.00	WIFIROUTER WiFi Router
<input type="checkbox"/>	1.00	WIFIAP WiFi Access Point
<input type="checkbox"/>	1.00	WIFIINSTALL WiFi Installation

Subscriptions		
QUANTITY	PRODUCT CODE	PRODUCT NAME
<input type="checkbox"/>	1.00	WARRANTY Warranty
<input type="checkbox"/>	1.00	LDWARRANTY Loss and Damag
<input type="checkbox"/>	1.00	MS-OFFICE365 Microsoft Office
<input type="checkbox"/>	1.00	CLOUDSTORAGE Cloud Storage 10
<input type="checkbox"/>	20.00	ADMINHOUR Admin Hour

Networking				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/>	1.00	WIFIROUTER WiFi Router		\$100.00
<input checked="" type="checkbox"/>	1.00	WIFIAP WiFi Access Point		\$60.00
<input type="checkbox"/>	1.00	WIFIINSTALL WiFi Installation		\$300.00

Subscriptions				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00	WARRANTY Warranty		\$0.00
<input type="checkbox"/>	1.00	LDWARRANTY Loss and Damage Warranty		\$0.00
<input type="checkbox"/>	1.00	MS-OFFICE365 Microsoft Office 365		\$10.00
<input type="checkbox"/>	1.00	CLOUDSTORAGE Cloud Storage 1GB		\$20.00
<input type="checkbox"/>	20.00	ADMINHOUR Admin Hour		\$75.00

Build and Learn

Cloud Storage available when both WiFi Router and Access Point are selected

Create First Option Constraint

Option for Cloud Storage

Information = Required Information

Constraint Name	Cloud Storage requires WiFi Router
Constrained Option	PO-000095
Constraining Option	PO-000089

Active

Configured SKU IT Professional Pack

Type Dependency

Option Constraint Group Cloud

Option for Router

Build and Learn

Cloud Storage available when both WiFi Router and Access Point are selected

Create Second Option Constraint

Option for Cloud Storage

Information = Required Information

Constraint Name	Cloud Storage requires WiFi Access Points
Constrained Option	PO-000095
Constraining Option	PO-000090
Check Prior Purchases	

Active	<input checked="" type="checkbox"/>
Configured SKU	IT Professional Pack
Type	Dependency
Option Constraint Group	Cloud

Option for Access Point

Exercise

Create Option Constraint with Grouping



Key Concepts

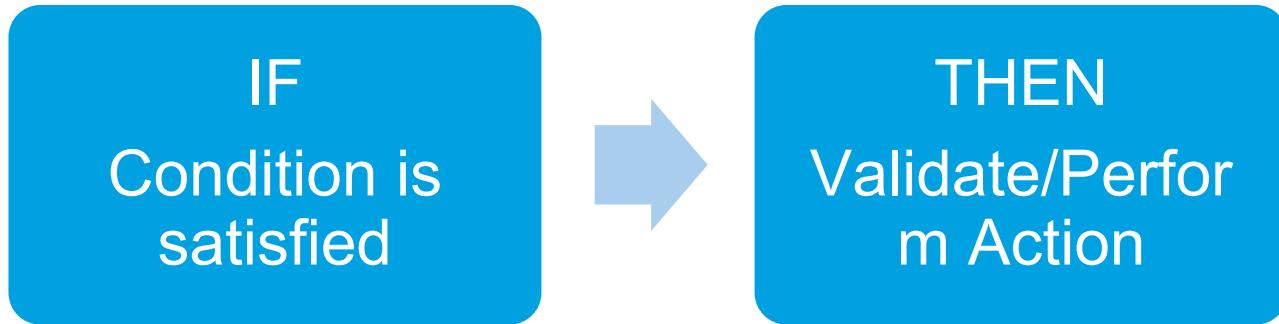
Option Constraints

- Understand key fields to set up Option Constraints
 - Difference between Constrained and Constraining options
 - Difference between Type: Dependency and Type: Exclusion
- A common error is to forget to activate the constraint
- Understand how to set up Option Constraint Groups
 - Transforms Option Constraints logic from OR to and AND
- Understand 'Check Prior Purchases' can verify Constraining Options of past purchases
- Related Knowledge Base Articles:
 - [Adding Option Constraints](#)
 - [Check Prior Purchases & Options \(to avoid creating product rules\)](#)

Product Rule (Part 1)

Product Rules

Product related rule driven by an IF/THEN structure



Product Rule Fields

Field	Description
Product Rule Name	Enter a meaningful name for the configuration attribute.
Conditions Met	<ul style="list-style-type: none">All: Choose if all conditions must be met to trigger this rule.Any: Choose if a single condition must be met to trigger this rule.
Scope	<ul style="list-style-type: none">Quote: Applies the logic to the entire quote, visible on Quote Line EditorProduct: Applies the logic only to bundle, visible during configuration
Evaluation Event	<ul style="list-style-type: none">Load: The rule will be evaluated when the product bundle is opened.Edit: The rule will be evaluated when the product bundle is changed.Save: The rule will be evaluated upon Save.Always: The rule will be evaluated during any event.

Product Rule Fields

Field	Description
Type	<ul style="list-style-type: none">Validation: Notifies the user of the invalid product selection and prevents saving.Selection: Automatically selects the applicable products for the user to prevent invalid selections.
Message	Enter a message visible to users when a Validation rule is triggered.

Error Condition Fields (IF)

Field	Description
Tested Object AND Tested Field	Determines which object/field combination is evaluated. <i>Should not be used if Tested Variable is populated.</i>
Tested Variable	Lookup which Summary Variable is evaluated. <i>Should not be used if Tested Object/Tested Field is populated.</i>
Operator	Choose which way the filter information will be compared to the evaluated information
Filter Type	Choose if Filter Value or Filter Variable will be used to compare against evaluated information
Filter Value	Manually entered value to compare against evaluated information
Filter Variable	Lookup which Summary Variable is compared against evaluated information

Product Action Fields (THEN)

Field	Description
Type	<p>Determines how to act upon a product option</p> <ul style="list-style-type: none">• Add/Remove: Automatically select option, or deselect the option• Enable/Disable: Controls if the checkbox is checkable, or grayed out• Show/Hide: Reveal the option, or remove the option from view
Product	Lookup a product that is effected by rule logic
Required	Select if and only if the rule logic should result in a selected option

Product Rule Use Cases

1. Automatically add the Maintenance Kit and Toner Cartridge options to the ITPROPACK bundle when a the LJ Printer is selected
 - IF LJ Printer is selected THEN automatically add the Maintenance Kit and Toner Cartridge options

1. Validate toner quantity to be greater than or equal to the number of printers sold
 - SUM number of printers and number of to toners
 - IF Toner Quantity is less than Printer Quantity THEN present a corrective message

Watch and Learn

Automatically add the Maintenance Kit and Toner Cartridge options to the IT PRO PACK Bundle

Printing				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	LJ-PRINTER	LaserJet Printer		\$275.00
<input checked="" type="checkbox"/> 1.00	LJ-TONER	LaserJet Toner Cartridge		\$125.00
<input checked="" type="checkbox"/> 1.00	LJ-MAINTKIT	LaserJet Maintenance Kit		\$20.00
<input type="checkbox"/> 1.00	LJ-PAPERLETTER	LaserJet Paper Letter		\$10.00

- █ = User selected
- █ = Rule selected

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

- Adds LJ-TONER and LJ-MAINTKIT as selected options

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

- Adds LJ-TONER and LJ-MAINTKIT as selected options

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

The screenshot shows the 'Information' tab of a Product Rule configuration page. A legend at the top right indicates that a red border around a field means it is 'Required Information'. The form fields include:

- Product Rule Name:** Selecting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT
- Conditions Met:** All
- Scope:** Product
- Evaluation Event:** Always
- Type:** Selection
- Active:** Yes (checked)
- Message:** (empty text area)

Annotations on the left side of the form ask 'What data to affect?' and point to the 'Conditions Met', 'Scope', and 'Evaluation Event' fields. A large orange box labeled 'Triggering Event' points to the 'Type' and 'Active' fields. Annotations on the right side ask 'What does it do?' and point to the 'Message' field.

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

Information ! = Required Information

Active <input checked="" type="checkbox"/>
Product <input type="text"/> IT Professional Pack x i
Product Rule <input type="text"/> Selecting LJ-PRINTER a x i
Product Feature <input type="text"/> x i

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

- Adds LJ-TONER and LJ-MAINTKIT as selected options

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Error Condition

The screenshot shows the Salesforce Product Rule configuration interface. The 'Information' section at the top contains fields for 'Rule' (Selecting LJ-PRINTER au), 'Tested Object' (Product Option), and 'Tested Field' (SBQQ_ProductCode_c). The 'Filter Information' section below it contains fields for 'Operator' (equals), 'Filter Type' (Value), and 'Filter Value' (LJ-PRINTER). Both sections are highlighted with orange boxes.

Information
Rule: Selecting LJ-PRINTER au
Tested Object: Product Option
Tested Field: SBQQ_ProductCode_c

Filter Information
Operator: equals
Filter Type: Value
Filter Value: LJ-PRINTER

Can test Fields,
Summary
Variables, or
Configuration
Attributes against
other data

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

- Adds LJ-TONER and LJ-MAINTKIT as selected options

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Actions — the “THEN” in a Product Rule

Information

Rule >Selecting LJ-PRINTER a 🔍

Type Add 🔍

Product LaserJet Toner Cartridge 🔍

Required

Relates to a Product record (Or other Product data)

= Required Information

Information

Rule >Selecting LJ-PRINTER a 🔍

Type Add 🔍

Product LaserJet Maintenance K 🔍

Required

Relates to a Product record (Or other Product data)

= Required Information

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

- Adds LJ-TONER and LJ-MAINTKIT as selected options

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Update Product Option



Exercise Printer Options Product Rule

Exercise Toner Quantity Validation



Key Concepts

Product Rule Assembly Process

- Understand Product Rule Detail
 - Types, Scope, Evaluation Event
- Understand Configuration Rule
 - Importance of assigning to a Product
- Understand Product Rule Error Conditions
 - Difference between Tested Object, Field and Variable vs Filter Types, Value, and Variables
 - How to incorporate the use of Summary Variables
- Understand Product Rule Actions
 - Types
 - Filter Options



Key Concepts

Product Rule Assembly Process (continued)

- Related Knowledge Base Articles:
 - [Product Validation Rules](#)
 - [Configuration Selection Rules](#)
 - [Create a Product Rule Based on a Prior Purchase \(Asset\)](#)
 - [Alert Rules](#)
 - [Product Actions](#)



Configuration Attributes

Watch and Learn

Notice Location Configuration Attributes has been built out

Q-00012

Configure Products

Filter ▾ ▾

Printing

Location	Q...	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
--None--	CODE	LJ-PRINTER	LaserJet Printer	\$275.00
United States		LJ-TONER	LaserJet Toner Cartridge	\$125.00
United Kingdom		LJ-MAINTKIT	LaserJet Maintenance Kit	\$20.00
		LJ-PAPERLETTER	LaserJet Paper Letter	\$10.00
		LJ-PAPERA4	LaserJet Paper A4	\$10.00

Configuration Attributes

Q: What if you need to specify a Location in configuration?

A: Create a configuration attribute!

Benefits:

- This feature allows you to associate configuration attributes to features
- The Admin can specify where the attributes are displayed so that there can be different sets of configuration attributes within each feature

Config Attribute Fields

Field	Description
Attribute Name	Enter a meaningful name for the configuration attribute.
Target Field	This is the field on the Product Option that will hold the attribute's value. If you need to add additional fields, you will have to enter them in the Target Field picklist on the custom object. See <i>Appendix</i> .
Required	Select if the configuration attribute requires a value before saving.
Row Order and Column Order	Row order determines which attribute appears first when multiple exist within a column. Column order determines left, middle, right using 1, 2, 3 respectively.
Position	<ul style="list-style-type: none">Top: The attribute will display at the top of the Feature, above the Product OptionsBottom: The attribute will display at the bottom of the Feature, beneath the Product Options.

Config Attribute Fields

Field	Description
Feature	Associate the configuration attribute with a feature to position it within the feature on the layout, or leave empty to place the configuration attribute above or below all features
Apply Immediately	Select only if users should receive immediate feedback from configuration rules (not needed for this example, as a rule is not associated with the attribute).

Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

- Allow Location__c values to be stored on the Quote Line for later use

Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

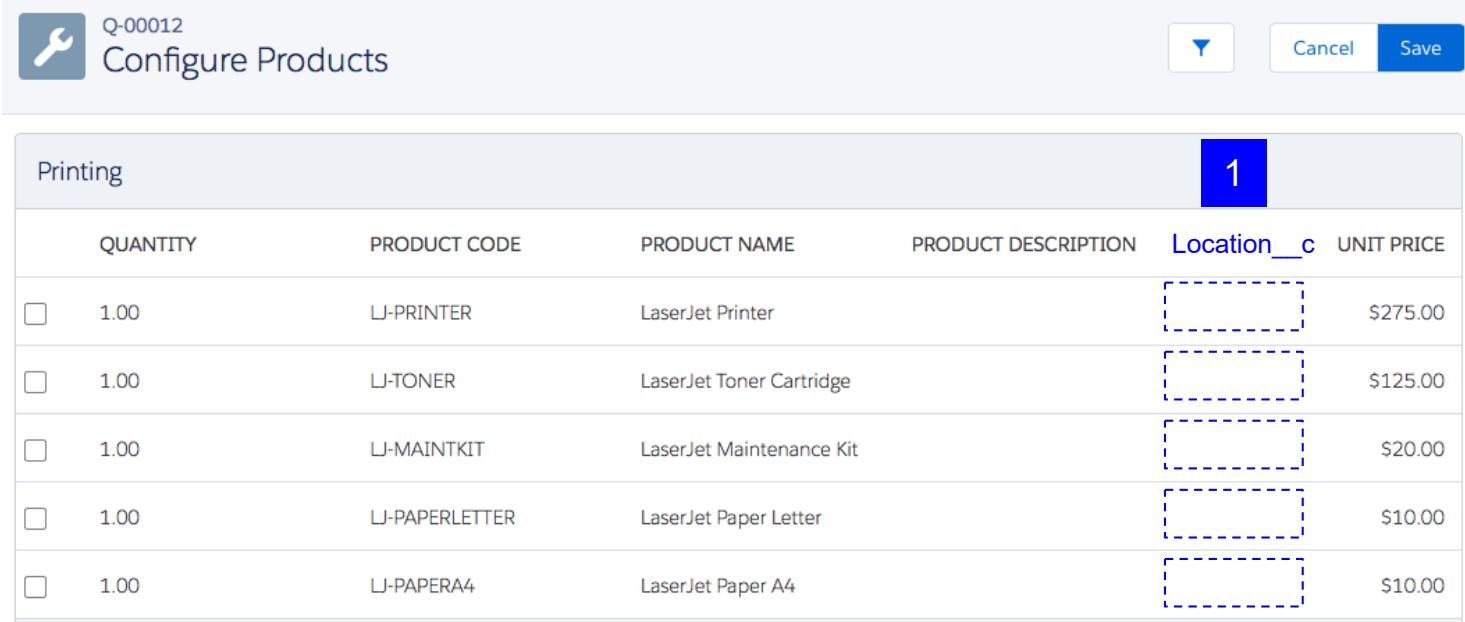
- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

- Allow Location__c values to be stored on the Quote Line for later use

Create Product Option picklist fields

Make a Location field available for use in any bundle



The screenshot shows a Salesforce interface for configuring products. At the top, there's a toolbar with a wrench icon, the ID Q-00012, and buttons for Filter, Cancel, and Save. Below the toolbar is a section titled "Printing" with a quantity of 1. A table lists five items:

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	Location__c	UNIT PRICE
<input type="checkbox"/> 1.00	LJ-PRINTER	LaserJet Printer			\$275.00
<input type="checkbox"/> 1.00	LJ-TONER	LaserJet Toner Cartridge			\$125.00
<input type="checkbox"/> 1.00	LJ-MAINTKIT	LaserJet Maintenance Kit			\$20.00
<input type="checkbox"/> 1.00	LJ-PAPERLETTER	LaserJet Paper Letter			\$10.00
<input type="checkbox"/> 1.00	LJ-PAPERA4	LaserJet Paper A4			\$10.00

Create Product Option picklist fields

Make a Location field available for use in any bundle

1. Navigate to Setup | Create | Objects | Product Option
2. Click New in Custom Fields & Relationships

The screenshot shows the 'Custom Fields & Relationships' section of the Salesforce setup. A red box highlights the 'New' button, which is used to create a new custom field. The table below lists the new field's details:

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field
Edit	SBQQ__AppliedImmediately_c	SBQQ__AppliedImmediately_c	SteelBrick CPQ	Checkbox		

3. Choose Pick List then click Next

The screenshot shows the 'Data Type' selection screen. The 'Picklist' option is selected, indicated by a blue circle with a checkmark. The other options are 'Phone' (radio button) and 'Picklist (Multi-Select)' (radio button). Descriptions for each option are provided:

- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.

Buttons for 'Next' and 'Cancel' are visible at the bottom right.



Create Product Option picklist fields

Make a Location field available for use in any bundle

4. Set field values, click Next, Next, then click Save

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label i

Values Use global picklist value set
 Enter values, with each value separated by a new line

United States
United Kingdom



Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

- Allow Location__c values to be stored on the Quote Line for later use

Create Config Attribute

Make a Location__c picklist visible on the IT PRO PACK bundle

Q-00012
Configure Products

Cancel Save

2

Printing

Location__c

AUTOMAPPING

Target Field

Location__c

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00	LJ-PRINTER	LaserJet Printer		\$275.00
<input type="checkbox"/> 1.00	LJ-TONER	LaserJet Toner Cartridge		\$125.00
<input type="checkbox"/> 1.00	LJ-MAINTKIT	LaserJet Maintenance Kit		\$20.00
<input type="checkbox"/> 1.00	LJ-PAPERLETTER	LaserJet Paper Letter		\$10.00
<input type="checkbox"/> 1.00	LJ-PAPERA4	LaserJet Paper A4		\$10.00

168

CONFIDENTIAL



Create Config Attribute

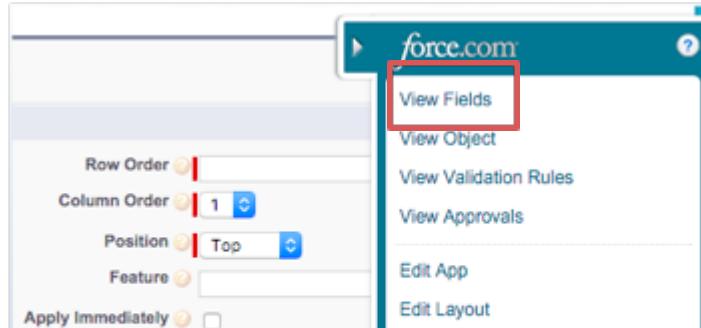
Make a Location__c picklist visible on the IT PRO PACK bundle

5. Navigate to the ITPROPACK product
6. Click New Configuration Attribute in the Configuration Attributes related list

The screenshot shows a list of configuration attributes. At the top, there are two entries with edit links: "Edit | Del Cloud Storage requires WiFi Router" and "Edit | Del Cloud Storage requires WiFi Access Points". Below this, there is a section titled "Configuration Attributes" with a "New Configuration Attribute" button. A message "No records to display" is shown. The newly created attribute is listed at the bottom of the list.

Attribute Name	Action
Cloud Storage requires WiFi Router	Edit Del
Cloud Storage requires WiFi Access Points	Edit Del
New Configuration Attribute	New Configuration Attribute

5. Open the Force.com Quick Access Menu, then click View Fields



Create Config Attribute

Make a Location__c picklist visible on the IT PRO PACK bundle

8. Click the Target Field link

The screenshot shows a list of configuration attributes. The third row, labeled 'SBQQ__TargetField__c', has its 'Target Field' link highlighted with a red box. The table includes columns for Edit, Row Order, API Name, Type, and Last Modified.

Edit	Row Order	SBQQ__DisplayOrder__c	SteelBrick CPQ	Number(3, 0)	Brian Cloutier, 1/15/2016 8:35 AM
Edit	Shown Values	SBQQ__ShownValues__c	SteelBrick CPQ	Long Text Area(5000)	Brian Cloutier, 1/15/2016 8:35 AM
Edit Replace	Target Field	SBQQ__TargetField__c	SteelBrick CPQ	Picklist	Brian Cloutier, 1/15/2016 8:35 AM

Related Lookup Filters
No related lookup filters defined.

8. Click New in Values

The screenshot shows a list of values for the 'SBQQ__TargetField__c' attribute. The 'New' button in the top right corner is highlighted with a red box. The table includes columns for Action, Values, API Name, Default, Chart Colors, and Modified By.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Unit Price	Unit Price	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM
Edit Del Deactivate	Discount (Amt)	Discount (Amt)	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM
Edit Del Deactivate	Discount (%)	Discount (%)	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM

Create Config Attribute

Make a Location__c picklist visible on the IT PRO PACK bundle

10. Enter API names of new Product Option Field, then Save



10. Return to the original Configuration Attribute tab and refresh the page

11. Set the field values, then Save

The screenshot shows the 'Information' tab of a configuration attribute. The following fields are highlighted with red boxes:

- Attribute Name: Location (ITPROPACK)
- Product: IT Professional Pack
- Target Field: Location__c
- Required:
- Row Order: 10
- Column Order: 1
- Position: Top
- Feature: (empty)
- Apply Immediately:
- Apply To Product Options:

Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

- Allow Location__c values to be stored on the Quote Line for later use

Create Quote Line picklist fields

Allow Location__c values to be stored on the Quote Line for later use

Q-00012
Edit Quote

Add Hardware Add Products ▾ Add Group Delete Lines ↻ Quick Save Calculate Cancel Save

Quote Information

Start Date 9/27/2017 Subscription Term 3 Target Customer Amount

#	Product Code	Product Name	Quantity	List Unit Price	Location__c	Net Unit Price	Net Total	Package Total	Actions
1	ITPROPACK	IT Professional Pack	1.00	\$0.00		\$0.00	\$0.00	\$1,510.00	☆ ↗ ↘
2	AP-MBPRO	Apple MacBook Pro	1.00	\$1,500.00		\$1,500.00	\$1,500.00	\$1,500.00	ⓘ
3	CPU22GHZI7	CPU 2.2GHz i7	1.00	Included		\$0.00	\$0.00	\$0.00	ⓘ
4	RAM8GB	RAM 8GB	1.00	Included		\$0.00	\$0.00	\$0.00	ⓘ
5	SSD256	SSD Hard Drive 256GB	1.00	Included		\$0.00	\$0.00	\$0.00	ⓘ
6	LJ-PAPERLETTER	LaserJet Paper Letter	1.00	\$10.00		\$10.00	\$10.00	\$10.00	ⓘ ↗

SUBTOTAL: \$1,510.00

QUOTE TOTAL: \$1,510.00



Create Quote Line picklist fields

Allow Location__c values to be stored on the Quote Line for later use

13. Navigate to Setup | Create | Objects | Quote Line

14. Click New in Custom Fields & Relationships

The screenshot shows the Salesforce Setup interface. At the top, there's a header for 'Standard Fields' with a 'Standard Fields Help' link. Below it is a table with columns: Action, Field Label, Field Name, Data Type, Controlling Field, Indexed, and Track History. Three rows are listed: 'Created_By' (CreatedBy, Lookup(User), no, no), 'Last_Modified_By' (LastModifiedBy, Lookup(User), no, no), and 'Line Name' (Name, Auto Number, checked, no). Below this is a section for 'Custom Fields & Relationships' with tabs: 'New' (highlighted with a red box), 'Field Dependencies', and 'Set History Tracking'. A 'Custom Fields & Relationships Help' link is also present. The table here has columns: Action, Field Label, API Name, Installed Package, Data Type, Indexed, Controlling Field, Modified By, and Track History. One row is shown: 'Edit' (Additional Disc., SBQQ__AdditionalDiscount__c, SteelBrick CPQ, Formula (Currency), Brian Cloutier, 1/15/2016, 8:35 AM).

13. Choose Picklist then click Next

This is a 'Choose Field Type' dialog box. It contains three radio button options: 'Phone', 'Picklist' (which is selected and highlighted with a blue circle), and 'Picklist (Multi-Select)'. To the right of each option is a brief description. At the bottom right are 'Next' and 'Cancel' buttons.

<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input checked="" type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.

Next Cancel



Create Quote Line picklist fields

Allow Location__c values to be stored on the Quote Line for later use

16. Set field values, click Next, Next, then click Save

Step 2. Enter the details Step 2 of 4

Field Label: Location

Values:

Use global picklist value set

Enter values, with each value separated by a new line

United States
United Kingdom



Automapping

AM

AM

Automapping

Product Option (Configuration Attribute) < -- > Quote Line

The screenshot shows the 'Configure Products' interface in Salesforce. At the top, there's a toolbar with a wrench icon, the identifier 'Q-00012', and two downward-pointing arrows. Below the toolbar, a section titled 'Printing' contains a table. The table has columns for 'Location', 'PRODUCT NAME', and 'Location__c'. A dropdown menu is open over the 'Location' column, showing options: '--None--', 'United States', and 'United Kingdom'. The table data is as follows:

Location	PRODUCT NAME	Location__c
<input type="checkbox"/> 1.00 LJ-PRINTER	LaserJet Printer	<input type="text"/>
<input type="checkbox"/> 1.00 LJ-TONER	LaserJet Toner Cartridge	<input type="text"/>
<input type="checkbox"/> 1.00 LJ-MAINTKIT	LaserJet Maintenance Kit	<input type="text"/>
<input type="checkbox"/> 1.00 LJ-PAPERLETTER	LaserJet Paper Letter	<input type="text"/>

Automapping

Product Option (Configuration Attribute) < -- > Quote Line

Q-00012
Configure Products

Printing

Location **United States**

AUTOMAPPING

QUANTITY	PRODUCT CODE	PRODUCT NAME	Location__c	UNIT PRICE
<input type="checkbox"/>	1.00	LJ-PRINTER	LaserJet Printer	\$275.00
<input type="checkbox"/>	1.00	LJ-TONER	LaserJet Toner Cartridge	\$125.00
<input type="checkbox"/>	1.00	LJ-MAINTKIT	LaserJet Maintenance Kit	\$20.00
<input checked="" type="checkbox"/>	1.00	LJ-PAPERLETTER	LaserJet Paper Letter	\$10.00

Automapping

Product Option (Configuration Attribute) < -- > Quote Line

Q-00012
Configure Products

Cancel

Printing

Location

QUANTITY	PRODUCT CODE	PRODUCT NAME	Location_c	UNIT PRICE
<input type="checkbox"/> 1.00	LJ-PRINTER	LaserJet Printer	<input type="text"/>	\$275.00
<input type="checkbox"/> 1.00	LJ-TONER	LaserJet Toner Cartridge	<input type="text"/>	\$125.00
<input type="checkbox"/> 1.00	LJ-MAINTKIT	LaserJet Maintenance Kit	<input type="text"/>	\$20.00
<input checked="" type="checkbox"/> 1.00	LJ-PAPERLETTER	LaserJet Paper Letter	<input type="text"/> United States	\$10.00

Q-00012
Edit Quote

#	PRODUCT NAME	QUANTITY	Location_c
1	IT Professional Pack	1.00	<input type="text"/>
2	Apple MacBook Pro	1.00	<input type="text"/>
3	CPU 2.2GHz i7	1.00	<input type="text"/>
4	RAM 8GB	1.00	<input type="text"/>
5	SSD Hard Drive 256GB	1.00	<input type="text"/>
6	LaserJet Paper Letter	1.00	<input type="text"/> United States

AUTOMAPPING

Key Concepts

Configuration Attribute Assembly Process

- 3 step process
 - Product Option picklist
 - Create Configuration Attribute
 - How to position with or without of a Feature
 - Quote Line picklist
- Understand the concept of Automapping
 - Configuration Attributes with same API name can be repurposed accross other bundled products
- Related Knowledge Base Articles:
 - [Configuration Attributes](#)
 - [Configuration Attribute Layouts](#)
 - [Auto-Mapping: Twin Fields](#)

Product Rule (Part 2)

Product Rule Use Cases

3. Only show US keyboards and paper options when Location is United States, Only show UK paper options when Location is United Kingdom
 - If Location = US then show Legal Paper Options, hide A4 Paper Options
 - If Location = UK then show A4 Paper Options, hide Legal Paper Options

Watch and Learn

Show US options when United States is selected, Show UK options when United Kingdom is selected

Q-00012

Configure Products

Printing

Location	Product Name	Product Description	Unit Price
--None--	LJ-PRINTER	LaserJet Printer	\$275.00
United States	LJ-TONER	LaserJet Toner Cartridge	\$125.00
United Kingdom	LJ-MAINTKIT	LaserJet Maintenance Kit	\$20.00
	LJ-PAPERLETTER	LaserJet Paper Letter	\$10.00
	LJ-PAPERA4	LaserJet Paper A4	\$10.00

US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

Create Actions

- Reveals US product options and hides UK product options

US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

Create Actions

- Reveals US product options and hides UK product options

US Items Product Rule

Implementation Process Overview

Create Product Rule and create Configuration Rule

Information = Required Information

Product Rule Name Only show US related products if Location is United States	Type Selection
Conditions Met All	Active <input checked="" type="checkbox"/>
Scope Product	Message
Evaluation Event Always	

US Items Product Rule

Implementation Process Overview

Create Product Rule and create Configuration Rule

Information ■ = Required Information

<input checked="" type="checkbox"/> Active
Product <input type="text"/> IT Professional Pack
Product Rule <input type="checkbox"/> Only show US related pr
Product Feature <input type="text"/>

US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

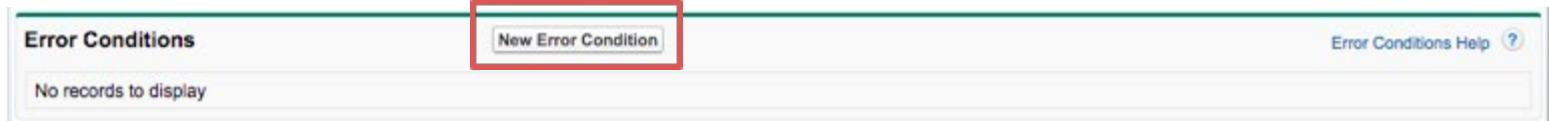
Create Actions

- Reveals US product options and hides UK product options

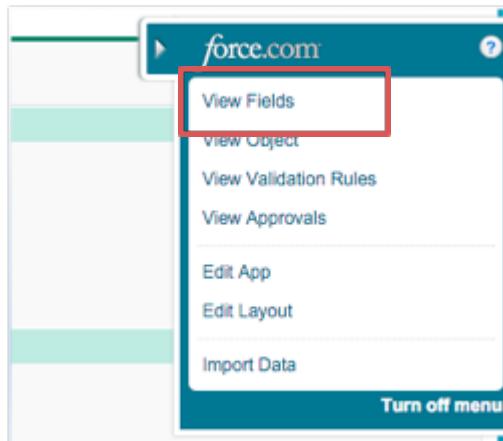
US Items Product Rule

Important Note: Add API Name Location__c to Tested Field Pick List first

- A. Click New Error Condition in Error Conditions



- A. Open the Force.com Quick Access Menu, then click View Fields



US Items Product Rule

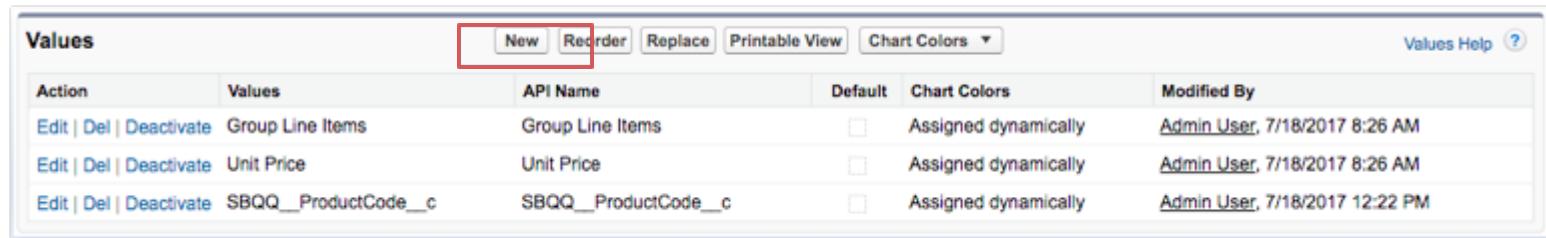
Important Note: Add API Name Location__c to Tested Field Pick List first

C. Click the Tested Field link



Edit	Rule	SBQQ__Rule__c	SteelBrick CPQ	Master-Detail(Product Rule)	<input checked="" type="checkbox"/>	Brian Cloutier, 1/15/2016 8:35 AM
Edit Replace	Tested Field	SBQQ__TestedField__c	SteelBrick CPQ	Picklist	Tested Object	Brian Cloutier, 1/15/2016 8:35 AM
Edit Replace	Tested Object	SBQQ__TestedObject__c	SteelBrick CPQ	Picklist		Brian Cloutier, 1/15/2016 8:35 AM
Edit	Tested Variable	SBQQ__TestedVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	<input checked="" type="checkbox"/>	Brian Cloutier, 1/15/2016 8:35 AM

C. Click New in Values

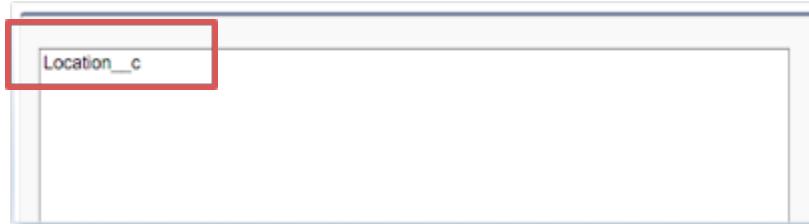


Values		New	Reorder	Replace	Printable View	Chart Colors	Values Help
Action	Values	API Name	Default	Chart Colors	Modified By		
Edit Del Deactivate	Group Line Items	Group Line Items	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM		
Edit Del Deactivate	Unit Price	Unit Price	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM		
Edit Del Deactivate	SBQQ__ProductCode__c	SBQQ__ProductCode__c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 12:22 PM		

US Items Product Rule

Important Note: Add API Name Location__c to Tested Field Pick List first

- E. Enter API name of the Product Option used for the configuration attribute, then Save



- E. Click the Change link next to the Tested Object

API Name	SBQQ__TestedField__c	Modified By	Brian Cloutier, 1/15/2016 8:35 AM
Description	Field on the Quote object that should be used in testing this condition.		
Help Text	Field on the Quote object that should be used in testing this condition.		
Created By	Brian Cloutier, 1/15/2016 8:35 AM	Modified By	Brian Cloutier, 1/15/2016 8:35 AM
Package Information			
Installed Package	SteelBrick CPQ	Available in Versions	24.0 - Current
Picklist Options			
Controlling Field	Tested Object [Change]		

US Items Product Rule

Important Note: Add API Name Location__c to Tested Field Pick List first

- G. Double-click the Location API name under the Configurable Attribute column, then Save

Click button to include or exclude selected values from the dependent picklist:					
Tested Object:	Quote	Quote Line	Quote Line Group	Product Option	Configuration Attributes
Tested Field:	Group Line Items				
	Unit Price				
	SBQQ_ProductCode__c	SBQQ_ProductCode__c	SBQQ_ProductCode__c	SBQQ_ProductCode__c	SBQQ_ProductCode__c
	Location__c	Location__c	Location__c	Location__c	Location__c



- G. Click OK if a warning popup appears
H. Return to the original Error Condition tab and refresh
I. Location__c should now appear in the Tested Field pick list

US Items Product Rule

Implementation Process Overview

Create Error Condition

Information

Rule Only show US related or

Tested Object Configuration Attributes

Tested Field Location_c

Tested Variable

Filter Information

Operator equals

Filter Type Value

Filter Value United States

Filter Variable

■ = Required Information

US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

Create Actions

- Reveals US product options and hides UK product options

US Items Product Rule

Implementation Process Overview

Create Actions

Information ■ = Required Information

Rule ! Only show US related or

Type ! Show

Product ! LaserJet Paper Letter

Required !



The screenshot shows a configuration interface for a product rule. At the top, it says "Information" and includes a legend where a red square means "Required Information". Below that, there's a "Rule" section with a search icon. Under "Type", a dropdown menu is open, with "Show" selected. This "Type" section is highlighted with an orange border. Below it is a "Product" field containing "LaserJet Paper Letter" with its own search icon. At the bottom left is a "Required" section with a red exclamation mark and a checkbox.

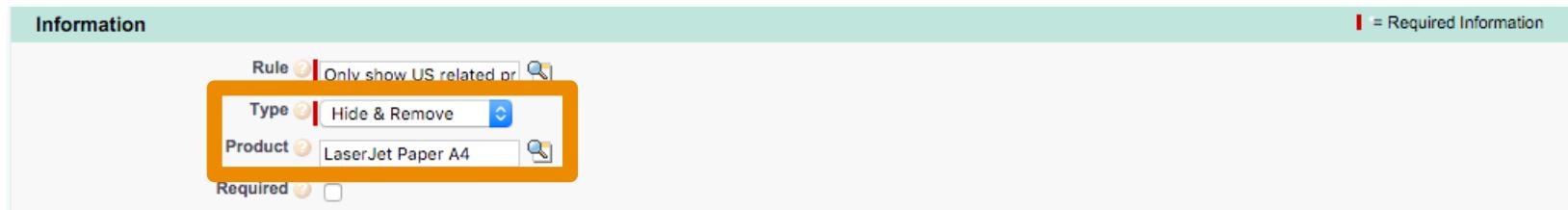
Information ■ = Required Information

Rule ! Only show US related or

Type ! Hide & Remove

Product ! LaserJet Paper A4

Required !



This screenshot shows the same configuration interface as the first one, but with a different "Type" setting. The "Type" dropdown now has "Hide & Remove" selected, which is also highlighted with an orange border. The other fields (Rule, Product) and the "Required" section remain the same.

US Items Product Rule

Location	United States			
Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/>  1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00
Peripherals				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00	AP-USKEYBOARD	Apple US Keyboard		\$50.00
<input type="checkbox"/> 1.00	AP-MAGICMOUSE	Apple Magic Mouse		\$80.00
<input type="checkbox"/> 1.00	AP-TBDISPLAY	Apple Thunderbolt Display		\$1,000.00

Exercise

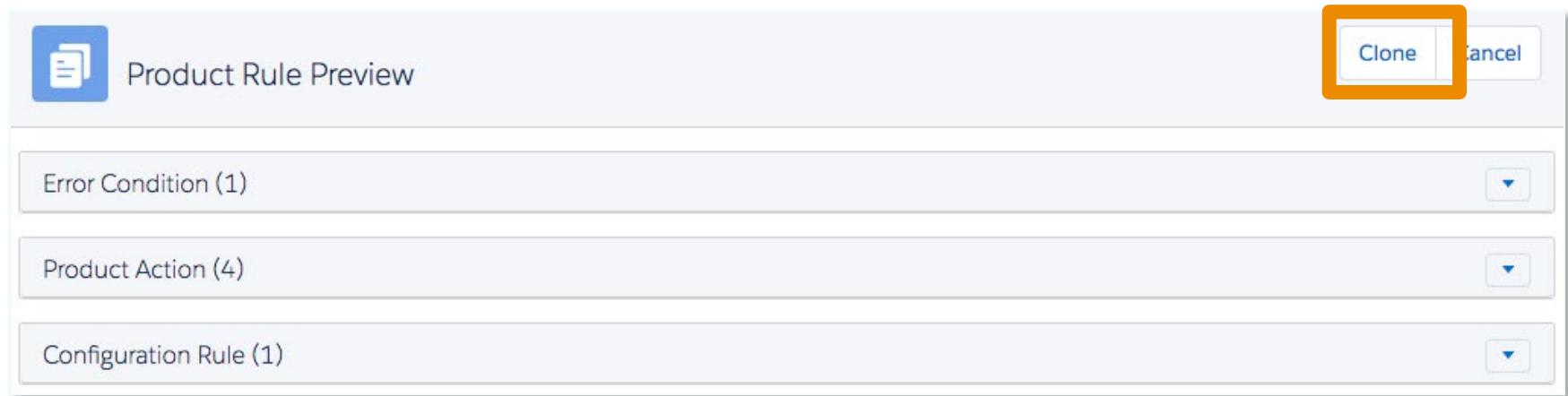
US Items Product Rule

Exercise

UK Items Product Rule

EX: UK Items Product Rule

After cloning, change all references of United States to United Kingdom, and vice versa



Product Rule Preview

Clone Cancel

Error Condition (1)

Product Action (4)

Configuration Rule (1)

Key Concepts

Product Rule with Configuration Attribute

- Importance of setting ‘Apply Immediately’ to trigger action
- Product rule Error Condition
 - Nested IFs need creation of separate rules (ie. for locations JP or BR)
 - Every action has a reaction (ie. hiding will require unhiding if condition is reverted)
- Understand how Filter Fields can be used in the Product Action
- Use of formula fields in a Product Rule
- Related Knowledge Base Articles:
 - [Product Actions](#)
 - [Configuration Attributes](#)
 - [Configuration Selection Rules](#)
 - [Hiding Options in Configurator](#)

Quote Line Editor

Helpful Pricing Fields

Q-00025
Quote Line Editor

Save Quick Save Cancel ⌂ Add Products ▾ Calculate Delete Lines Groups ▾

Start Date 2/1/2016 Subscription Term 36 Target Customer Amount

Quote Information

Edit Line Editor Fieldset on Quote

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL					
1	AP-MBPRO	Apple MacBook Pro	1.00	\$1,500.00	\$1,500.00				\$1,500.00	\$1,500.00	★	trash	copy	edit	more
2	CPU22GHZI7	↳ CPU 2.2GHz i7	1.00	Included	\$0.00	Included			\$0.00	\$0.00					
3	RAM8GB	↳ RAM 8GB	1.00	Included	\$0.00	Included			\$0.00	\$0.00					
4	SSD256	↳ SSD Hard Drive 256GB	1.00	Included	\$0.00	Included			\$0.00	\$0.00					

SUBTOTAL: \$1,500.00

Quote TOTAL: \$1,500.00

Edit Line Editor Fieldset on Quote Line

Pricing Waterfall

AM

SE

ES

AM

Pricing Structure

Standard Item
Subscription Item

Extended Price = Unit x Quantity
Extended Price = Unit x Quantity x Prorated Term

Original Price		\$100.00
List Price		\$100.00
- System Discounts	Discount Schedules	10%
Regular Price (*)		\$90.00
- Additional Discount	Manually entered by the sales rep	20%
Customer Price		\$72.00
- Partner Discount		10%
Partner Price		\$64.80
- Distributor Discount		10%
Net Price	Goes into Pipeline/Forecast Amount	\$58.32

* Regular Price also represents Special Price or Contracted Price after
Discount Schedules



Pricing Methods

AM

SE

ES

Subscriptions

AM

SP

ES

AM

Subscription Fields for Subscription Products

Implementation Process Overview

Product Detail

Product Name Microsoft Office 365 Active

Product Code MS-OFFICE365 Product Family Software

Salesforce CPQ Information

Pricing Method List Pricing Method Editable
Quantity Editable Exclude From Opportunity
Non Discountable Asset Conversion One per quote line
 All

Subscriptions

Subscription Pricing Fixed Price Percent Of Total (%)
Subscription Term 1 Percent Of Total Category
Percent Of Total Base List Percent Of Total Target



Products Tab> Product Views & "Go"> Microsoft Office 365

View Package Settings for Subscription Products

Implementation Process Overview

Settings Editor
Salesforce CPQ

Save Cancel

Documents	Groups	Line Editor	Plugins	Pricing and Calculation	Subscriptions and Renewals	Quote	Order	Additional Settings
Renewal Model	Contract Based	Disable Add Subscriptions						
Allow Renewal Quotes Without Assets	Subscription Term Unit	Month						
Subscription Prorate Precision	Month	Include Net-new Products in Maintenance						
Contract In Foreground	Re-evaluate Bundle Logic on Renewals							

Subscription Prorate Precision Month

Subscription Term Unit Month

Contract In Foreground

Disable Add Subscriptions

Include Net-new Products in Maintenance

Re-evaluate Bundle Logic on Renewals

Setup>Installed Packages>Salesforce CPQ: Configure>Subscriptions and Renewals

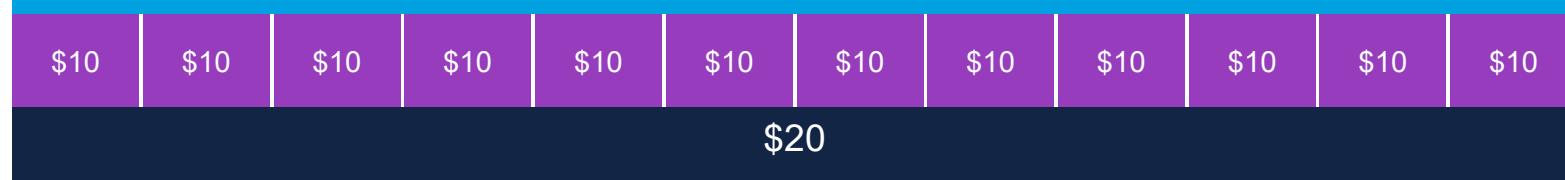


Subscription Term

Product Subscription Term & Quote/Quote Line Subscription Term

Subscription Product	Product's Subscription Term	Price	Total
MS Office 365	1 month	\$10	\$120
Cloud Storage	12 months	\$20	\$20

Quote's Subscription Term = 12



= \$120

= \$20

Subscription Term & Proration

Subscription Product	Quote's Subscription Term	Product's Subscription Term	Prorate Multiplier	Price	Total
MS Office 365	6 months	1 month	$6 / 1 = 6$	\$10	\$60
Cloud Storage	6 months	12 months	$6 / 12 = 0.5$	\$20	\$10

Quote's Subscription Term = 6

\$10 | \$10 | \$10 | \$10 | \$10 | \$10

= \$60

$\$20 \times 0.5$

= \$10

Package Settings: Proration Precision

Settings Editor
Salesforce CPQ

Save Cancel

Documents Groups Line Editor Plugins Pricing and Calculation Subscriptions and Renewals Quote Order Additional Settings

Renewal Model

Allow Renewal Quotes Without Assets

Subscription Prorate Precision Month

Contract In Foreground

Disable Add Subscriptions

Subscription Term Unit Month

Include Net-new Products in Maintenance

Re-evaluate Bundle Logic on Renewals

The screenshot shows the 'Subscriptions and Renewals' tab selected in the top navigation bar. Two specific settings are highlighted with orange boxes: 'Subscription Prorate Precision' (set to 'Month') and 'Subscription Term Unit' (also set to 'Month'). Other visible settings include 'Renewal Model' (set to 'Contract Based'), 'Allow Renewal Quotes Without Assets' (unchecked), 'Contract In Foreground' (checked), and several other options like 'Disable Add Subscriptions' and 'Include Net-new Products in Maintenance'.

Setup > Installed Packages > Salesforce CPQ: Configure > Subscriptions and Renewals

Prorate Multiplier Formulas

January 10th - March 20th = 2 whole months & 11 days OR 70 days

Prorate Precision	List Price	Prorate Multiplier Formula	Prorate Multiplier	Net Price
Monthly	\$10/mo	Quote Term Rounded Up / Product's Default Subscription Term	3 months / 1 = 3	\$10 * 3 = \$30
Monthly + Daily	\$10/mo	Quote Term's Whole months + Extra Days / (365/12) (Numerator: Days in year Denominator: default subscription term)	2 months + 11/ (365/12) = 2.36	\$10 * 2.36 = \$23.60
Day (Term Unit = Month)	\$10/mo	Effective Quote Term / Sample Subscription Term	70 days/31 = 2.25	\$10*2.25 = \$22.50

Day (Term Unit = Day)	\$10/day	Quote Term / Product's Default Subscription Term	70 days / 1 = 70 days = 70	\$10 * 70 = \$700
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Key Concepts

Subscription Pricing

- The Prorate Precision setting is found in Package Settings
 - Day
 - Month
 - Monthly+Day
- Calculate Regular Price of Subscription product with discount schedules
- Related Knowledge Base Articles:
 - [Overview of Product Pricing](#)
 - [Subscription Prorate Precision](#)



Percent of Total (POT)

Update Subscription Fields for Percent of Total Products

Implementation Process Overview

Product Detail

Product Name: Loss and Damage Warranty
Product Code: LDWARRANTY
Active:
Product Family: Support

Salesforce CPQ Information

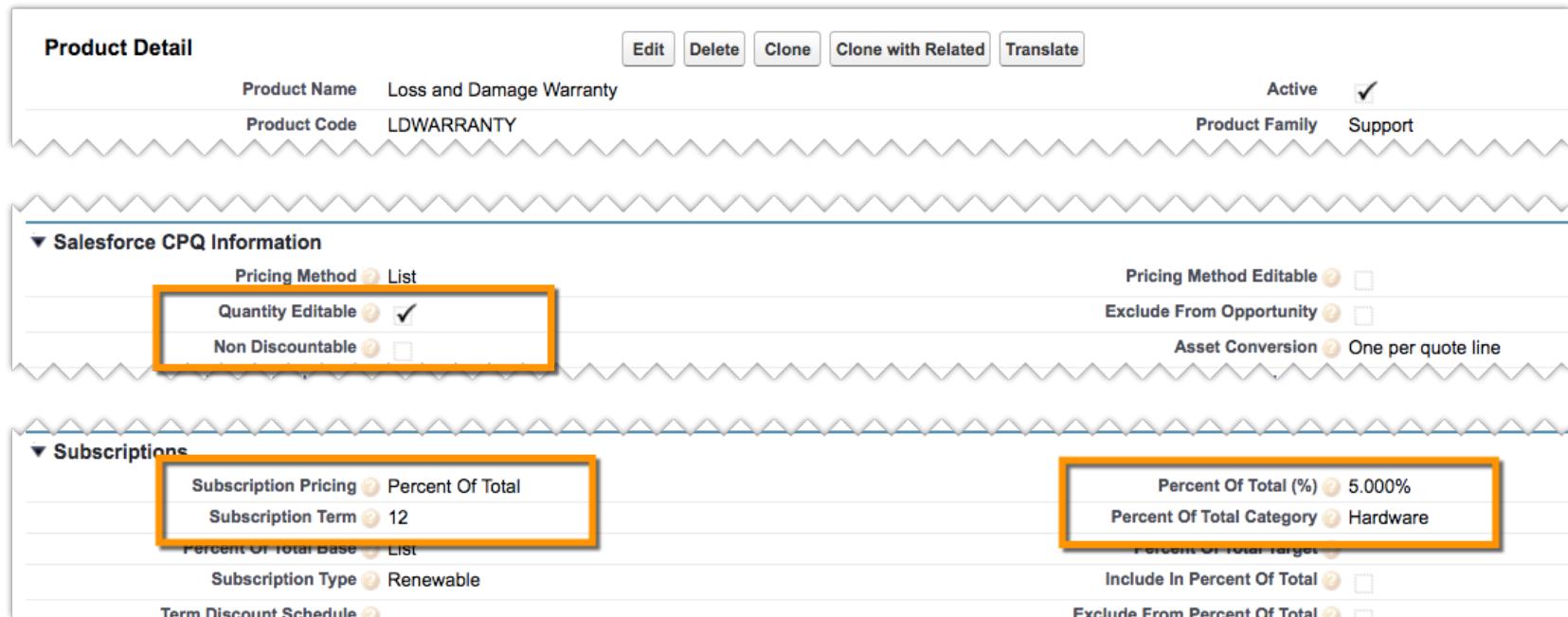
Pricing Method: List
Quantity Editable: (highlighted)
Non Discountable:

Pricing Method Editable:
Exclude From Opportunity:
Asset Conversion: One per quote line

Subscriptions

Subscription Pricing: Percent Of Total
Subscription Term: 12
Percent Of Total Base: LIST
Subscription Type: Renewable

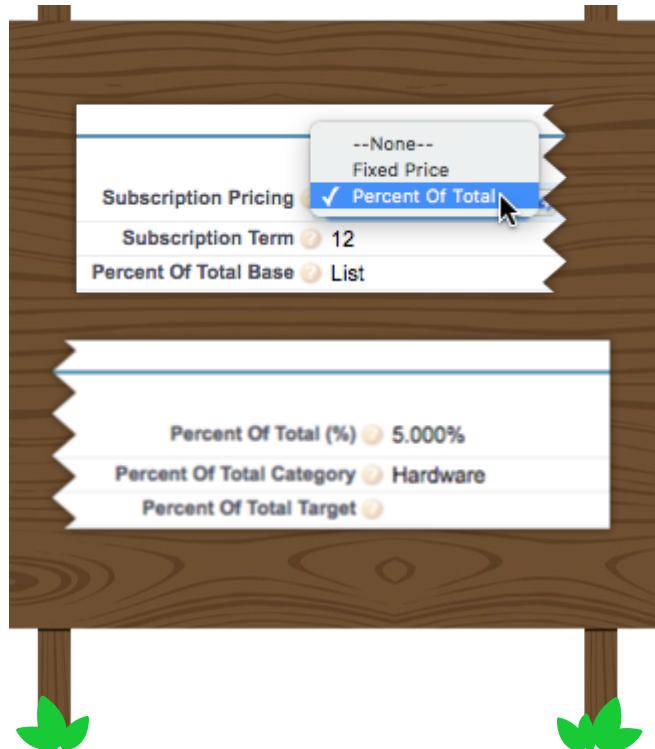
Percent Of Total (%): 5.000%
Percent Of Total Category: Hardware
Percent Of Total Target:
Include In Percent Of Total:
Exclude From Percent Of Total:



Products Tab > Product Views & "Go" > Loss and Damage Warranty

Subscription Pricing

Percent of Total



End-User Experience



#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE
1	AP-MAGICMOUSE	Apple Magic Mouse	1.00	\$80.00
2	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00
3	LJ-PAPERLETTER	LaserJet Paper Letter	1.00	\$10.00
4	LJ-PRINTER	LaserJet Printer	1.00	\$275.00
5	LDWARRANTY	Loss and Damage Warranty	1.00	\$63.75

Products Tab > Product Views & Go > Loss and Damage Warranty

Key Concepts

POT

- Understand how POT products are set up
 - For Subscriptions > Pricing Method: List and Subscription Pricing: Percent of Total
 - For Assets > Pricing Method: Percent of Total and Subscription Pricing: NULL and
 - Appear as \$0 on Renewal Quote
 - Subscription Term
 - Percent of Total Base
 - Percent of Total Scope
 - Percent of Total Category
 - For Assets > Pricing Method: Percent of Total and Subscription Pricing: NULL and
 - For Subscriptions > Pricing Method: List and Subscription Pricing: Percent of Total do the same thing
- Importance of assigning POT Category on associated products
- Related Knowledge Base Articles:
 - [Percent of Total Pricing](#)
 - [Percent of Total Calculations of Parent Bundles](#)

Pricing Methods

- Most common pricing methods are available out-of-the-box
 - List Pricing
 - Cost + Markup Pricing
 - Block Pricing, with optional overage rate
 - Custom Pricing (“Special Price”)
 - Contract Prices (Customer-Specific Price)

Cost and Margin

Cost and Margin

Cost Object

- Related List on Product object
- Use the same way as a Price Book entry
- Can be extended

Margin

- Calculated on the Quote Line object
- Create rollup summary fields to aggregate at the Quote level

Key Concepts

Cost and Margin

- Best used when Sales User needs the ability to mark-up from cost
- Pricing Method set to Cost
- Cost is a related list entry on the Product
- Markup is entered by Sales User on Quote Line UI
- Related Knowledge Base Articles:
 - [Cost and Markup Pricing](#)



Block Pricing

AM

SP

5

AM

Watch and Learn

Block Pricing already built out for Toner Recycling Product

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	TONERRECYCLE	Toner Recycling	1.00	\$15.00	<input type="text"/>	%	\$15.00	\$15.00			

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	TONERRECYCLE	Toner Recycling	20.00	\$15.00	<input type="text"/>	%	\$15.00	\$15.00			

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	TONERRECYCLE	Toner Recycling	21.00	\$25.00	<input type="text"/>	%	\$25.00	\$25.00			

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	TONERRECYCLE	Toner Recycling	51.00	\$26.00	<input type="text"/>	%	\$26.00	\$26.00			

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

- Makes special OverageRate field to define an overage price per unit

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

- Makes special OverageRate field to define an overage price per unit

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Update Product Price Method

▼ SteelBrick Information

Pricing Method  Block	Pricing Method Editable  <input type="checkbox"/>
Quantity Editable  <input checked="" type="checkbox"/>	Exclude From Opportunity  <input type="checkbox"/>
Non Discountable  <input type="checkbox"/>	Asset Conversion  One per quote line
Discount Schedule  <input type="checkbox"/>	Hidden  <input type="checkbox"/>

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

- Makes special OverageRate field to define an overage price per unit

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Create tiers

Information		= Required Information	
Price Name	1-20 Units	Owner	Admin User
Lower Bound	1	Product	Toner Recycling
Upper Bound	21	Price Book	Standard Price Book
		Price	15.00

Information		= Required Information	
Price Name	21-50 Units	Owner	Admin User
Lower Bound	21	Product	Toner Recycling
Upper Bound	51	Price Book	Standard Price Book
		Price	25 .00

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

- Makes special OverageRate field to define an overage price per unit

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Create special Block Price currency field

Step 2. Enter the details Step 2 of 4

Field Label [i](#)

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Number of digits to the left of the decimal point

Field Name [i](#)

Decimal Places Number of digits to the right of the decimal point

[Previous](#) [Next](#) [Cancel](#)

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

- Makes special OverageRate field to define an overage price per unit

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Create Overage tier

Information ! = Required Information

Price Name	51+
Lower Bound	51
Upper Bound	
OverageRate	1.00

Owner	Admin User
Product	Toner Recycling
Price Book	Standard Price Book
Price	26.00

Contract Pricing

Watch and Learn

Burlington Textiles Weaving Plant Generator set up with Contract Pricing

- A contracted price of \$150 for LJ-PRINTER has been set up
- A contracted price for 15% discount on the Consumable product family has been set up
- Create quote and add printer related items to observe the contracted prices in effect



Pricing Structure

Standard Item
Subscription Item

Extended Price = Unit x Quantity
Extended Price = Unit x Quantity x Prorated Term

Original Price		\$100.00
List Price		\$100.00
- System Discounts	Discount Schedules	10%
Regular Price (*)		\$90.00
- Additional Discount	Manually entered by the sales rep	20%
Customer Price		\$72.00
- Partner Discount		10%
Partner Price		\$64.80
- Distributor Discount		10%
Net Price	Goes into Pipeline/Forecast Amount	\$58.32

* Regular Price also represents Special Price or Contracted Price after
Discount Schedules

Contracted Pricing Considerations

Parent – Child Accounts

Child Accounts inherit Contracted Prices from Parent Accounts. Two ways to prevent this...

- Establish a new Contracted Price Record on the Child Account

Information	
Account	Parent Account
Product	LaserJet Printer
Price	150

Dashed arrow pointing to:

Information	
Account	Child Account
Product	LaserJet Printer
Price	175

- Use the “Ignore Parent Contracted Prices” Checkbox on the Child Account

Account Detail	
Account Owner	Admin User [Change]
Account Name	Child Account [View Hierarchy]
Parent Account	Parent Account
Ignore Parent Contracted Prices	
Account Number	

Key Concepts

Contract Pricing

- Understand the Contract Pricing assembly process
 - Effective/Expiration Date
 - Discount
 - Product
 - Discount Schedules can be assigned (highest precedent)
- Inheritance options for Parent/Child accounts
- Note: 'Generate Contracted Price' will auto-generate a contracted price when the Opportunity is Contracted

- Related Knowledge Base Articles:
 - [Contract Pricing](#)
 - [Auto-Generating a Contracted Price](#)
 - [Ignore Parent Contracted Pricing](#)

Discount Schedules

Discount Schedules

Volume Discount

- Discounts based on quantity

Term Discount (multi-year discount)

- Discounts based on number of months

Cost Discount

- Discounts applied directly to the product cost instead of list price

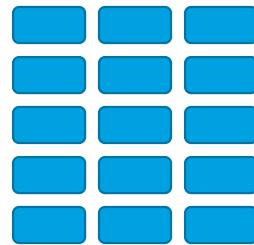


Discount Schedule Overview

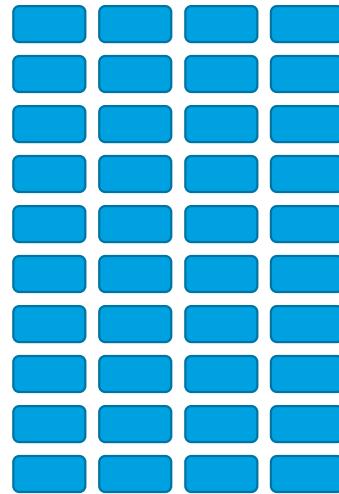
Automatically apply discounts based on quantity



\$1.00 per unit



\$0.90 per unit



\$0.75 per unit



Discount Schedule Overview

Automatically apply discounts based on term length

\$1.00 per unit per year



\$0.80 per unit per year



Discount Schedule Fields

Field	Description
Schedule Name	Enter a meaningful name for the discount schedule.
Type	<ul style="list-style-type: none">Range: Discounted at the rate of whatever tier applies to the quote quantity.Slab: Discounted at the blended rate of whatever tier applies to the quoted quantity and all preceding tiers.
Discount Unit	<ul style="list-style-type: none">Percent: Will allow you to enter the discount as a percentage.Amount: Will allow you to enter a static value for the discount. This means that sales users can arrive at an exact price without having to calculate discount percentages with a large amount of decimals.
Aggregation Scope	<ul style="list-style-type: none">None: Uses only the quantity of the individual line to determine tierQuote: Combines quantity of all quote line items of same productGroup: Combines quantity of line items of same product in same group

Discount Schedule Variations

Type – Range vs Slab



\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98
\$0.98

10 units

\$11.76 total



\$0.98
\$0.98
\$1.00
\$1.00
\$1.00
\$1.00
\$1.00
\$1.00
\$1.00
\$1.00
\$1.00
\$1.00

10 units

\$11.96 total



Discount Schedule Variations

Aggregation Scope – None vs Quote

Add quantities of like products

Aggregation Scope

- None--
- Quote
- Group

PRODUCT CODE	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	NET UNIT PRICE	NET TOTAL
LJ-PAPERLETTER	7.00	\$10.00	\$10.00	\$10.00	\$70.00
LJ-PAPERLETTER	7.00	\$10.00	\$10.00	\$10.00	\$70.00



Aggregation Scope

- None--
- Quote
- Group

PRODUCT CODE	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	NET UNIT PRICE	NET TOTAL
LJ-PAPERLETTER	7.00	\$10.00	\$9.80	\$9.80	\$68.60
LJ-PAPERLETTER	7.00	\$10.00	\$9.80	\$9.80	\$68.60



Discount Schedule Variations

Aggregation Scope – Group

Aggregation Scope --None--
Product **Group**

★ Alfa Add Products ▾ Optional Subscription Term
Additional Disc. (%)

#	PRODUCT CODE	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	NET UNIT PRICE	NET TOTAL
1	LJ-PAPERLETTER	8.00	\$10.00	\$9.80	\$9.80	\$78.40
2	LJ-PAPERLETTER	8.00	\$10.00	\$9.80	\$9.80	\$78.40
						SUBTOTAL: \$156.80

★ Beta Add Products ▾ Optional Subscription Term
Additional Disc. (%)

#	PRODUCT CODE	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	NET UNIT PRICE	NET TOTAL
3	LJ-PAPERLETTER	8.00	\$10.00	\$10.00	\$10.00	\$80.00
						SUBTOTAL: \$80.00

Discount Schedule Use Case

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL			
<input type="checkbox"/>	1	LJ-PAPERLETTER	LaserJet Paper Letter	10.00	\$10.00	\$10.00				\$10.00	\$100.00			

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL			
<input type="checkbox"/>	1	LJ-PAPERLETTER	LaserJet Paper Letter	11.00	\$10.00	\$9.80				\$9.80	\$107.80			

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL			
<input type="checkbox"/>	1	LJ-PAPERLETTER	LaserJet Paper Letter	21.00	\$10.00	\$9.50				\$9.50	\$199.50			



Build and Learn

Create a Discount Schedule

Give customers increasingly larger discounts the more LJ-PAPERLETTER they buy

Number of Reams	Discount
1-10	0%
11-20	2%
21-30	5%
31-40	8%
41+	10%

PRODUCT CODE	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	NET UNIT PRICE	NET TOTAL
LJ-PAPERLETTER	50.00	\$10.00	\$9.00	\$9.00	\$450.00
SUBTOTAL:					\$450.00

1. Create Discount Schedule Record
2. Create Tier Records
3. Apply to a Product

Discount Schedule

Implementation Process Overview

Create Discount Schedule

- Defines a general purpose discount schedule

Create tiers

- Determines that price breaks occur at steps of 10 units

Associate Discount Schedule to a Product

- Leverages discount schedule on the LJ-PAPERLETTER product



Discount Schedule

Implementation Process Overview

Create Discount Schedule

- Defines a general purpose discount schedule

Create tiers

- Determines that price breaks occur at steps of 10 units

Associate Discount Schedule to a Product

- Leverages discount schedule on the LJ-PAPERLETTER product



Discount Schedule

Implementation Process Overview

Create Discount Schedule

Information ■ = Required Information

Schedule Name <input type="text" value="Steps of 10 units"/>	Owner <input type="text" value="Brian Cloutier"/>
Type <input type="radio"/> Range	Cross Products <input type="checkbox"/>
Discount Unit <input type="radio"/> Percent	Cross Orders <input type="checkbox"/>
Aggregation Scope <input type="radio"/> Quote	Include Bundled Quantities <input type="checkbox"/>
Product <input type="text"/>	Price Book <input type="text"/>



Discount Schedule

Implementation Process Overview

Create Discount Schedule

- Defines a general purpose discount schedule

Create tiers

- Determines that price breaks occur at steps of 10 units

Associate Discount Schedule to a Product

- Leverages discount schedule on the LJ-PAPERLETTER product



Discount Schedule

Implementation Process Overview

Create tiers

Excluded value

#	Tier Name	Lower Bound	Upper Bound	Discount (%)	
1	No Discount	1.00	11.00	0	[+/-]
2	11-20 Units	11.00	21.00	2	[+/-]
3	21-30 Units	21.00	31.00	5	[+/-]
4	31-40 Units	31.00	41.00	8	[+/-]
5	41+ Units	41.00		10	[+/-]

Save Cancel



Exercise

Create a Discount Schedule



Key Concepts

Discount Schedule

- Understand what can Discount Schedules be attached to and trump order (hierarchy):
 - Contracted Price (Account)
 - Product Option
 - Product Feature
 - Product
- Understand the Assembly process setup options
 - Type, Discount Unit, Aggregation Scope, Override Behavior picklist
 - Cross Products/Cross Orders checkboxes
- Understand Slab vs Range Discount calculations
- Lower bound is inclusive, Upper bound is exclusive
- Slab is not compatible with Cross Products
- Related Knowledge Base Articles:
 - [Discount Methods: Discount Schedule Overview](#)
 - [User Defined Discount Schedules](#)

Pricing Rules

AM

SE

ES

AM

Price Rule Overview

Similar Structure as a Product Rule

- Price Rule (general properties)
- Price Conditions (with possible Advanced Condition Logic)
- Price Actions

Inject a value into a Quote or Quote Line Field

- Static Value
- Field Value (usually a formula field)
- Summary Variable

Price Rule Fields

Field	Description
Product Rule Name	Enter a meaningful name for this rule.
Evaluation Scope	<ul style="list-style-type: none">Configurator: The rule will be evaluated while configuring the productCalculator: The rule will be evaluated on the quote
Conditions Met	<ul style="list-style-type: none">All: Triggers the action only when all conditions are metAny: Triggers the action only when any conditions are metCustom: Use with the Advanced Conditions field to define how the conditions should apply. For example, this enables a rule with 3 conditions to be handled as: 1 AND (2 OR 3)
Calculator Evaluation Event	<ul style="list-style-type: none">On Initialization: Price rule will be evaluated when the quote line editor loadsBefore Calculate: Price rule will be evaluated before the price is calculatedOn Calculate: Price rule will be evaluated as the price is being calculatedAfter Calculate: Price rule will be evaluated after the price is calculated
Configurator Evaluation Event	<ul style="list-style-type: none">None or Save: Configurator-scoped price rules will fire after Save is selected within the Configurator.Edit: Configurator-scoped price rules will fire immediately after edits to quantity have been made within the Configurator, as well as after Save is selected.

Price Rule Fields

Field	Description
Configurator Evaluation Event	<ul style="list-style-type: none">• None or Save: Configurator-scoped price rules will fire after Save is selected within the Configurator.• Edit: Configurator-scoped price rules will fire immediately after edits to quantity have been made within the Configurator, as well as after Save is selected.
Active	<ul style="list-style-type: none">• Select to active the rule for users

Price Condition Fields (IF)

Field	Description
Object	Choose the object against which the rule is evaluated, such as Quote Line or Summary Variable. Admins may need to manually add values to this picklist in the Price Condition's Page Layout.
Field	Choose the field that should contain the value you enter in the subsequent Value field. Admins may need to manually add fields to this picklist in the Price Condition's Page Layout.
Operator	Choose the logical operator you want to apply when comparing the Field to the Value.
Tested Variable	Enter or lookup the Summary Variable if you created one, to compare against the Value field.
Tested Formula	Enter a formula with operators, functions and available fields on quote and target object. You can construct a formula using many of Salesforce's available operators and functions. You can also add in information from the quote or the target object field (i.e., SBQQ__QuoteLine__c.SBQQ__ListPrice__c). Add Caution.
Index	Allows the user to assign a unique number to this Condition if they wish to reference it within a Price Rule's Advanced Condition. Advanced Conditions allow user to establish conditional logic under which a Price Rule will fire - I.e., IF (1 AND 2) OR 3.

Price Condition Fields (IF)

Field	Description
Filter Type	Value: Evaluate this rule against a specific value Variable: Evaluate this rule against another Summary Variable Formula: Evaluate this rule against the result of a Filter Formula
Filter Variable	Enter or lookup the Summary Variable to evaluate against in the Tested Variable field
Filter Value	Enter the value you want to match in the field you selected using the Operator chosen.
Filter Formula	Enter a formula with operators, functions, and available fields on quote and target object. You can construct a formula using many of Salesforce's available operators and functions. You can also add in information from the quote or the target object field (i.e., SBQQ__QuoteLine__c.SBQQ__ListPrice__c).

Price Action Fields (THEN)

Field	Description
Target Object	Select the object on which the field is defined. Admins may need to manually add values to this picklist in the Price Condition's Page Layout.
Target Field	Select the field you want updated when the related Price Conditions are met. Admins may need to manually add values to this picklist in the Price Condition's Page Layout.
Value	Enter the value you want inserted into the target field.
Source Field	Enter a source field if the value you want inserted is calculated in another Quote Line field.
Source Variable	Enter the Summary Variable that sources value for this action.
Formula	Enter a formula with operators, functions, and available fields on quote and target object. You can construct a formula using many of Salesforce's available operators and functions. You can also add in information from the quote or the target object field (i.e., SBQQ__QuoteLine__c.SBQQ__ListPrice__c).
Order	Enter number order for a set of actions

Summary Variables

Composite Summary Variable

A Summary Variable with an additional calculation

- Add
- Subtract
- Multiply
- Divide

Calculate using

- Static Value
- Another Summary Variable

Summary Variables

Field	Description
Variable Name	Enter a meaningful name for the summary variable.
Aggregate Function	Choose the method to use for calculations (Count, Sum, Average, Min, Max).
Aggregate Field	Choose the quote line field that is acted upon by the aggregate function.
Target Object	Choose the object to aggregate: Quote Line, Product Option, Asset, or Subscription .
Composite Operator	Choose how you will combine the summary variables : Add, Subtract, Multiply or Divide .
Value Element	Enter a static value to be combined with the summary variable.
Variable Element	Enter or lookup another summary variable if your condition is based on both results. Note: <i>This was previously known as the Combine With field.</i>
Filter Field	Choose the field to use when filtering line items for inclusion in the summary variable.
Operator	Choose the operator for the filter.
Filter Value	Enter the value to match in this filter.
Constraint Field	Choose a Constraint Field . <i>If you want to limit the records further based on a Quote field, select the field that you want to match against the same field on the quote. This assumes you have added the API name of the quote field to the list of values in the Constraint Field definition on the Summary Variable object.</i>

Maintenance Kit Price Rule

Scenario: A client wants their users to only configure quotes with twice the number of Maintenance Kits to Printers whenever Maintenance Kits are added.

Q-00000

Quote Line Editor

Save Quick Save Cancel Add Products ▾ Calculate Delete Lines Groups ▾

Quote Information

Start Date 3/1/2016 Subscription Term 12 Target Customer Amount

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL			
<input type="checkbox"/>	1	LJ-MAINTKIT	LaserJet Maintenance Kit	4.00	\$20.00	\$20.00			%	\$20.00	\$80.00			
<input type="checkbox"/>	2	LJ-PRINTER	LaserJet Printer	2.00	\$275.00	\$275.00			%	\$275.00	\$550.00			

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when LJ-MAINTKIT line items are encountered

Create Summary Variable

- Provides sum total quantity value of LJ-PRINTER, multiplied by 2

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when LJ-MAINTKIT line items are encountered

Create Summary Variable

- Provides sum total quantity value of LJ-PRINTER, multiplied by 2

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

Information = Required Information

Price Rule Name	Set quantity of LJ-MAINTKIT to twice the quantity of LJ-PRINTER	Active	<input checked="" type="checkbox"/>
Evaluation Scope	Calculator	Evaluation Order	10
Conditions Met	All	Product	<input type="text"/>
Evaluation Event	Available On Load After Calculate	Chosen	On Calculate
Lookup Object		--None--	

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when LJ-MAINTKIT line items are encountered

Create Summary Variable

- Provides sum total quantity value of LJ-PRINTER, multiplied by 2

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Condition

Information

Price Rule ? Set quantity of LJ-MAIN

Object ? Quote Line

Field ? Product Code

Tested Variable

Tested Formula

Filter Information

Operator ? equals

Filter Type ? Value

Filter Value ? LJ-MAINTKIT

Filter Variable

Filter Formula

| = Required Information



Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when LJ-MAINTKIT line items are encountered

Create Summary Variable

- Provides sum total quantity value of LJ-PRINTER, multiplied by 2

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Summary Variable

Information |= Required Information

Variable Name <input type="text" value="Total quantity of LJ-PRINTER multiplied by 2"/>	Aggregate Function <input type="text" value="Sum"/>
Target Object <input type="text" value="Quote Line"/>	Aggregate Field <input type="text" value="Quantity"/>

Filter Information

Filter Field <input type="text" value="Product Code"/>	Operator <input type="text" value="equals"/>
Filter Value <input type="text" value="LJ-PRINTER"/>	Constraint Field <input type="text" value="--None--"/>

Composite Information

Composite Operator <input type="text" value="Multiply"/>	Variable Element <input type="text"/>
	Value Element <input type="text" value="2"/>

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when LJ-MAINTKIT line items are encountered

Create Summary Variable

- Provides sum total quantity value of LJ-PRINTER, multiplied by 2

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Action

Information = Required Information

Target Object <input type="text" value="Quote Line"/>	Rule <input type="text" value="Set quantity of LJ-MAIN"/>
Target Field <input type="text" value="SBQQ_Quantity_c"/>	<input type="button" value="Search"/>
Formula <input type="text"/>	

Price Action Sources

Source Field <input type="text"/>	Source Variable <input type="text" value="Total quantity of LJ-PRINTER multiplied by 2"/>
Source Lookup Field <input type="text" value="--None--"/>	<input type="button" value="Search"/>

EX: Maintenance Kit Price Rule

Steps to set quantity of LJ-MAINTKIT to always be twice the quantity of LJ-PRINTER

Q-00000

Quote Line Editor

Save Quick Save Cancel C Add Products ▾ Calculate Delete Lines Groups ▾

Start Date 3/1/2016 Subscription Term 12 Target Customer Amount

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	LJ-MAINTKIT	LaserJet Maintenance Kit	4.00	\$20.00	\$20.00		%	\$20.00	\$80.00	☆	trash	copy	
<input type="checkbox"/>	2	LJ-PRINTER	LaserJet Printer	2.00	\$275.00	\$275.00		%	\$275.00	\$550.00	☆	trash	copy	

WiFi Access Point Price Rule

Scenario: Our clients want their users to sell Macbook Pros with access points. Each WiFi Access Point can support up to 12 MacBook Pros. Create a rule that calculates how many access points are needed given how many MacBook Pros a user adds to a quote.

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL					
<input type="checkbox"/>	1	AP-MBPRO	Apple MacBook Pro	14.00	\$1,500.00	\$1,500.00			<input type="text"/>	% ▾	\$1,500.00	\$21,000.00				
2	CPU22GHZI7	 CPU 2.2GHz i7		14.00	Included	\$0.00	Included				\$0.00	\$0.00				
3	RAM8GB	 RAM 8GB		14.00	Included	\$0.00	Included				\$0.00	\$0.00				
4	SSD256	 SSD Hard Drive 256GB		14.00	Included	\$0.00	Included				\$0.00	\$0.00				
<input type="checkbox"/>	5	WIFIAP	WiFi Access Point	2.00	\$60.00	\$60.00			<input type="text"/>	% ▾	\$60.00	\$120.00				

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

- Provides sum total quantity value of AP-MBPRO, divided by 12

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field



WiFi Access Point Price Rule

Implementation Process Overview Continued



Create second Price Action

- Injects ceiling formula result into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

- Provides sum total quantity value of AP-MBPRO, divided by 12

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

Information ■ = Required Information

Price Rule Name <input type="text" value="Set quantity of WIFIAP based on quantity of AP-MBPRO"/>	Active <input checked="" type="checkbox"/>
Evaluation Scope <input type="text" value="Calculator"/>	Evaluation Order <input type="text" value="20"/>
Conditions Met <input type="text" value="All"/>	Product <input type="text"/>
Evaluation Event <input type="text" value="Available
On Load
After Calculate"/> ▶ <input type="text" value="Chosen
On Calculate"/> ◀	Lookup Object <input type="text" value="--None--"/>

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

- Provides sum total quantity value of AP-MBPRO, divided by 12

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Condition

Information

Price Rule ! Set quantity of WIFIAP

Object ! Quote Line

Field ! Product Code

Tested Variable

Tested Formula

Filter Information

Operator ! equals

Filter Type ! Value

Filter Value ! WIFIAP

Filter variable

! = Required Information

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

- Provides sum total quantity value of AP-MBPRO, divided by 12

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Summary Variable

Information ■ = Required Information

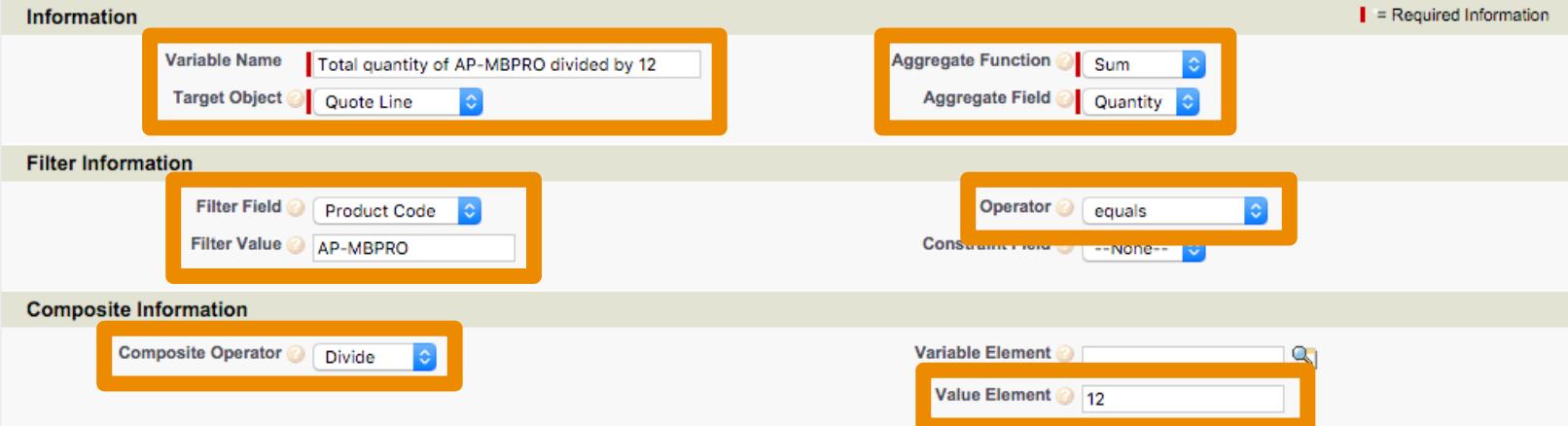
Variable Name <input type="text" value="Total quantity of AP-MBPRO divided by 12"/>	Aggregate Function <input type="text" value="Sum"/>
Target Object <input type="text" value="Quote Line"/>	Aggregate Field <input type="text" value="Quantity"/>

Filter Information

Filter Field <input type="text" value="Product Code"/>	Operator <input type="text" value="equals"/>
Filter Value <input type="text" value="AP-MBPRO"/>	Constraint Field <input type="text" value="--None--"/>

Composite Information

Composite Operator <input type="text" value="Divide"/>	Variable Element <input type="text"/>
	Value Element <input type="text" value="12"/>



WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

- Provides sum total quantity value of AP-MBPRO, divided by 12

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create first Price Action

Information = Required Information

Target Object <input type="text" value="Quote Line"/>	Rule <input type="text" value="Set quantity of WiFiAP.h"/>
Target Field <input type="text" value="SBQQ__Quantity__c"/>	Order <input type="text" value="1"/>
Formula <input type="text"/>	

Price Action Sources

Source Field <input type="text"/>	Source Variable <input type="text" value="Total quantity of AP-MBPRO divided by 12"/>
Source Lookup Field <input type="text" value="--None--"/>	

WiFi Access Point Price Rule

Implementation Process Overview



Create second Price Action

- Injects ceiling formula result into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create second Price Action

Information ■ = Required Information

Target Object <input type="text" value="Quote Line"/> Required	Rule <input type="text" value="Set quantity of WiFiAP.h"/> Required
Target Field <input type="text" value="SBQQ__Quantity__c"/> Required	Order <input type="text" value="2"/> Required
Formula <input type="text" value="CEILING(SBQQ__Quantity__c)"/> Required	

Price Action Sources

Source Field <input type="text"/>	Source Variable <input type="text"/> Required
Source Lookup Field <input type="text" value="--None--"/> Required	

EX: WiFi Access Point Price Rule

Create Price rule to set quantity of WIFIAP so there is always 1 for every 12 AP-MBPRO

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	AP-MBPRO	Apple MacBook Pro	14.00	\$1,500.00	\$1,500.00			% ▾	\$1,500.00	\$21,000.00	   			
2	CPU22GHZI7	↳ CPU 2.2GHz i7		14.00	Included	\$0.00	Included			\$0.00	\$0.00				
3	RAM8GB	↳ RAM 8GB		14.00	Included	\$0.00	Included			\$0.00	\$0.00				
4	SSD256	↳ SSD Hard Drive 256GB		14.00	Included	\$0.00	Included			\$0.00	\$0.00				
<input type="checkbox"/>	5	WIFIAP	WiFi Access Point	2.00	\$60.00	\$60.00			% ▾	\$60.00	\$120.00	  			

Total Cost of Hardware Use Case

Sum the net cost of all products in the Hardware family

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP
<input type="checkbox"/>	1	ADMINHOUR	Admin Hour	1.00	\$75.00	\$1,800.00	\$60.00	
<input type="checkbox"/>	2	AP-REMOTEDesktop	Apple Remote Desktop	1.00	\$80.00	\$80.00	\$50.00	
<input type="checkbox"/>	3	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	\$1,000.00	\$900.00	
<input type="checkbox"/>	4	AP-USKEYBOARD	Apple US Keyboard	2.00	\$50.00	\$50.00	\$35.00	

Quote
Q-00011

[Approvals \[0\]](#) | [Quote Lines \[4\]](#) | [Quote Line Groups \[0\]](#) | [Quote Document \[0\]](#)

[Edit](#) [Delete](#) [Clone](#)
[Import Lines](#) [Merge](#)

Quote Detail

Quote Number	Q-00011
Primary	<input checked="" type="checkbox"/>
Status	Draft
Expires On	7/22/2016
Sales Rep	Admin User
Primary Contact	Korben Dallas
Subscription Term	24
Delivery Method	
Master Contract	
Region	
Total Cost of Hardware Products	\$970.00

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

- Provides Net Cost (unit cost * quantity) for each line item

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c



Total Cost of Hardware Price Rule

Implementation Process Overview Continued



Create Price Action

- Injects variable value into Total_Cost_of_Hardware_Products__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

- Provides Net Cost (unit cost * quantity) for each line item

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

The screenshot shows the Salesforce formula editor. At the top left, there's an example: "Gross Margin = Amount - Cost_c". Below it are buttons for "Simple Formula" and "Advanced Formula". In the center, there's a text input field containing the formula: "SBQQ__Cost__r.SBQQ__UnitCost__c * SBQQ__Quantity__c". This entire input field is highlighted with an orange rectangle. To the right of the input field is a "Functions" section with a dropdown menu set to "All Function Categories". Underneath the dropdown, three functions are listed: "ABS", "AND", and "BEGINS". At the top right of the editor, there's a link to "Operators & Functions".

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

- Provides Net Cost (unit cost * quantity) for each line item

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote currency field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	Total Cost of Hardware Products	i
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".		
Length	16	Number of digits to the left of the decimal point
Field Name	Total_Cost_of_Hardware	i
Decimal Places	2	Number of digits to the right of the decimal point

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

- Provides Net Cost (unit cost * quantity) for each line item

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Price Rule

Information ! = Required Information

Price Rule Name <input type="text" value="Total Cost of Hardware Products"/>	Active <input checked="" type="checkbox"/>
Evaluation Scope <input type="text" value="Calculator"/>	Evaluation Order <input type="text" value="40"/>
Conditions Met <input type="text" value="All"/>	Product <input type="text"/>
Calculator Evaluation Event <input type="text" value="Available On Initialization Before Calculate"/> <input type="button" value="Chosen On Calculate"/>	Lookup Object <input type="text" value="--None--"/>

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

- Provides Net Cost (unit cost * quantity) for each line item

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Summary Variable

Summary Variable Edit

Save Save & New Cancel

Information

Variable Name: Total Cost of Hardware Products
Target Object: Quote Line

Aggregate Function: Sum
Aggregate Field: Net_Cost__c

Filter Information

Filter Field: Product Family
Filter Value: Hardware

Operator: equals
Constraint Field: --None--

Composite Information

Composite Operator: --None--

Variable Element:

Value Element:

= Required Information

The screenshot shows the 'Summary Variable Edit' interface in Salesforce. It's a step in the implementation process for a 'Total Cost of Hardware Price Rule'. The 'Information' section is highlighted with an orange border. Inside, the 'Variable Name' is set to 'Total Cost of Hardware Products' and the 'Target Object' is 'Quote Line'. To the right, the 'Aggregate Function' is set to 'Sum' and the 'Aggregate Field' is 'Net_Cost__c'. Below this, the 'Filter Information' section is also highlighted with an orange border. It contains a 'Filter Field' set to 'Product Family' with a value of 'Hardware', and an 'Operator' set to 'equals'. The 'Composite Information' section at the bottom has a 'Composite Operator' set to '--None--'. There are two input fields: 'Variable Element' and 'Value Element', each with a search icon to its right.

Total Cost of Hardware Price Rule

Implementation Process Overview



Create Price Action

- Injects variable value into Total_Cost_of_Hardware_Products__c

Total Cost of Hardware Price Rule

Implementation Process Overview

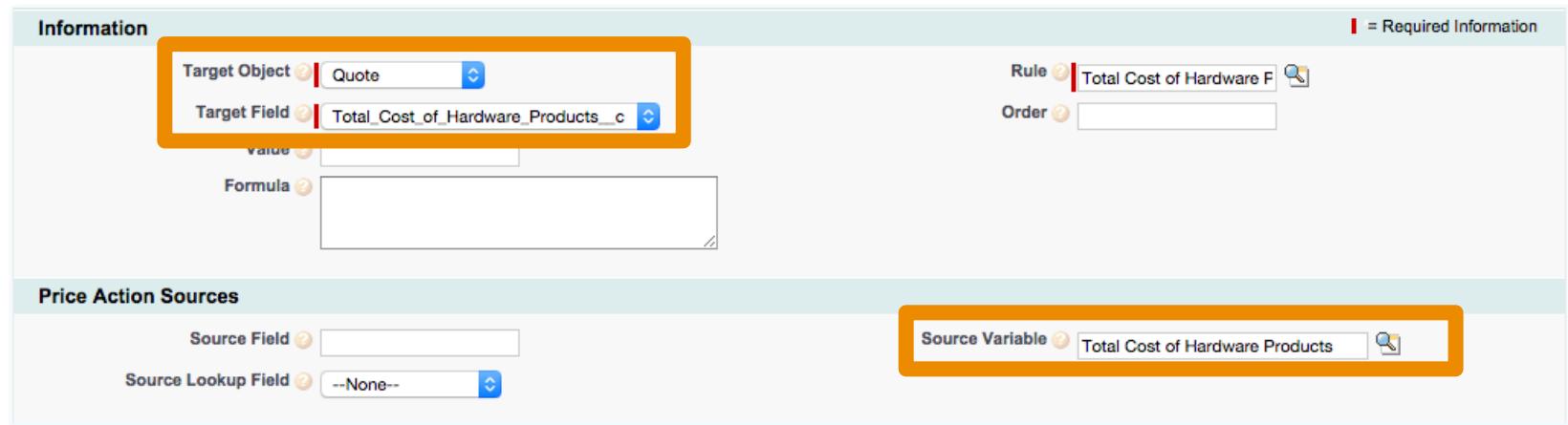
Create Price Action

Information ! = Required Information

Target Object <input type="text" value="Quote"/> ?	Rule <input type="text" value="Total Cost of Hardware P"/> ? 🔍
Target Field <input type="text" value="Total_Cost_of_Hardware_Products_c"/> ?	Order <input type="text"/> ?
Formula <input type="text"/> ?	

Price Action Sources

Source Field <input type="text"/> ?	Source Variable <input type="text" value="Total Cost of Hardware Products"/> ? 🔍
Source Lookup Field <input type="text" value="--None--"/> ?	



EX: Total Cost of Hardware Price Rule

Sum the net cost of all products in the Hardware family

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP
<input type="checkbox"/>	1	ADMINHOUR	Admin Hour	1.00	\$75.00	\$1,800.00	\$60.00	
<input type="checkbox"/>	2	AP-REMOTEDesktop	Apple Remote Desktop	1.00	\$80.00	\$80.00	\$50.00	
<input type="checkbox"/>	3	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	\$1,000.00	\$900.00	
<input type="checkbox"/>	4	AP-USKEYBOARD	Apple US Keyboard	2.00	\$50.00	\$50.00	\$35.00	

Quote
Q-00011

Approvals [0] | Quote Lines [4] | Quote Line Groups [0] | Quote Document Tra

Quote Detail

Quote Number Q-00011
Primary ✓
Status Draft
Expires On 7/22/2016
Sales Rep Admin User
Primary Contact Korben Dallas
Subscription Term 24
Delivery Method
Master Contract
Region
Total Cost of Hardware Products \$970.00

Edit **Delete** **Clone**
Import Lines **Modify**

Partner Discount Use Case

Account Detail Save Cancel

Account Owner	Admin User [Change]							
Account Name	MondoCorp [View Hierarchy]							
Parent Account								
Account Number								
Account Site	--None--							
Partner Level	<input checked="" type="checkbox"/> Silver							
Quantity	LIST UNIT PRICE	PARTNER DISCOUNT	PARTNER UNIT PRICE	NET UNIT PRICE	NET TOTAL			
1.00	\$75.00	0.00	\$1,800.00	\$1,800.00	\$1,800.00			
<input type="checkbox"/> 2 AP-TBDISPLAY Apple Thunderbolt Display	1.00	\$1,000.00	0.00	\$1,000.00	\$1,000.00			
#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	PARTNER DISCOUNT	PARTNER UNIT PRICE	NET UNIT PRICE	NET TOTAL
<input type="checkbox"/>	1 ADMINHOUR	Admin Hour	1.00	\$75.00	10.00	\$1,620.00	\$1,620.00	\$1,620.00
<input type="checkbox"/>	2 AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	10.00	\$900.00	\$900.00	\$900.00
#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	PARTNER DISCOUNT	PARTNER UNIT PRICE	NET UNIT PRICE	NET TOTAL
<input type="checkbox"/>	1 ADMINHOUR	Admin Hour	1.00	\$75.00	20.00	\$1,440.00	\$1,440.00	\$1,440.00
<input type="checkbox"/>	2 AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	20.00	\$800.00	\$800.00	\$800.00



Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank



Partner Discount Price Rule

Implementation Process Overview Continued



Create Price Action

- Injects correct discount into SBQQ__PartnerDiscount__c

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

Field Label **Partner Level** 

Enter values for the picklist, with each value separated by a new line.

Bronze
Silver
Gold

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.
 Use first value as default value

Field Name **Partner_Level** 

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Quote text formula field

Step 3. Enter formula Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & ", " & FirstName [More Examples ...](#)

[Simple Formula](#) [Advanced Formula](#)

[Insert Field](#) [Insert Operator ▾](#)

Partner Level (Text) ▾

`TEXT(SBQQ__Account__r.Partner_Level__c)`

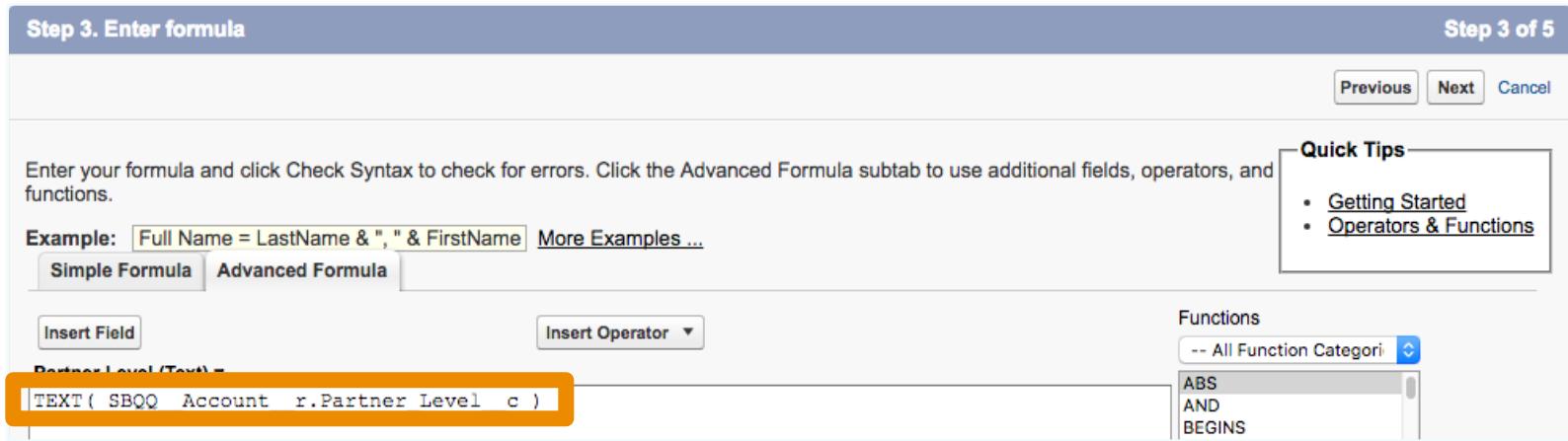
Functions

[-- All Function Categories ▾](#)

- ABS
- AND
- BEGINS

Quick Tips

- [Getting Started](#)
- [Operators & Functions](#)



Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Price Rule

Information ! = Required Information

Price Rule Name <input type="text" value="Partner Discount"/>	Active <input checked="" type="checkbox"/>						
Evaluation Scope <input type="text" value="Calculator"/> (1)	Evaluation Order <input type="text" value="50"/> (2)						
Conditions Met <input type="text" value="All"/> (3)	Product <input type="text"/> (4)						
Calculator Evaluation Event (5)	Lookup Object <input type="text" value="--None--"/> (6)						
<table border="1"><tr><td>Available</td><td>Chosen</td></tr><tr><td>On Initialization</td><td>On Calculate</td></tr><tr><td>Before Calculate</td><td></td></tr></table>	Available	Chosen	On Initialization	On Calculate	Before Calculate		
Available	Chosen						
On Initialization	On Calculate						
Before Calculate							

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Condition

Information

Price Rule ! = Required Information

Object !

Field !

Tested Variable

Tested Formula

Filter Information

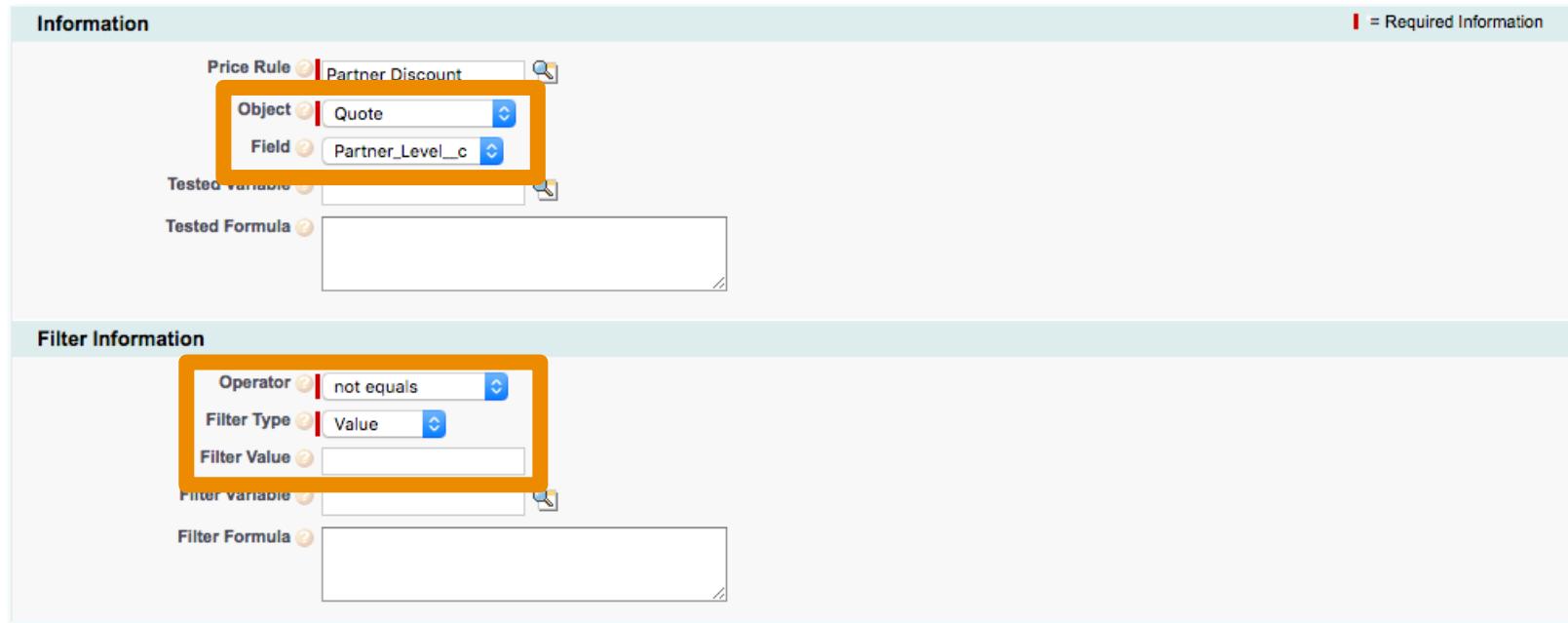
Operator !

Filter Type !

Filter Value

Filter Variable

Filter Formula



Salesforce

Partner Discount Price Rule

Implementation Process Overview



Create Price Action

- Injects correct discount into SBQQ__PartnerDiscount__c

Partner Discount Price Rule

Implementation Process Overview

Create Price Action

Information ■ = Required Information

Target Object ? <input type="text" value="Quote Line"/>	Rule ? <input type="text" value="Partner Discount"/> 🔍
Target Field ? <input type="text" value="SBQQ__PartnerDiscount__c"/>	Order ? <input type="text"/>
Formula ? <input 10,<br="" bronze",="" type="text" value="CASE(SBQQ__Quote__r.Partner_Level__c,
"/> "Silver", 20, "Gold", 30, 0)"/>	

Price Action Sources

Source Field ? <input type="text"/>	Source Variable ? <input type="text"/> 🔍
Source Lookup Field ? <input type="text" value="--None--"/> 🔍	

EX: Partner Discount Price Rule

Create a rule that automatically applies a partner discount based on the Account partner level

Key Concepts

Pricing Rule

- Understand the Pricing Rule assembly process
 - Detail
 - Evaluation Scope and Order
 - Configuration vs Calculator Evaluation Event
 - Price Conditions
 - Tested and Filter fields
 - Actions
 - Target Object or Target Field injects
 - static Value
 - values from a Formula (ie. WiFi Access Point)
 - Source Variable from a Summary variable (ie. Maintenance Kit)



Key Concepts

Pricing Rule (continued)

- Summary Variable assembly process
 - Composite Information (ie. WiFi Access Point)
- Related Knowledge Base Articles:
 - [Price Rules](#)
 - [Adding Summary Variables](#)
 - [Real-Time Price Rules in Configuration](#)
 - [Writing Advanced Calculator Compatible Formulas](#)
 - [Original Price - MSRP Pricing](#)





Creating a Lookup Object

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

Create Object

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Partner Level Discount	Example: Account
Plural Label	Partner Level Discounts	Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Partner_Level_Discount	Example: Account
-------------	------------------------	------------------

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Partner Level Discount	Example: Account Name
-------------	------------------------	-----------------------

Data Type	Auto Number	
Display Format	PLD-{0000}	Example: A-{0000} What Is This?
Starting Number	0001	

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

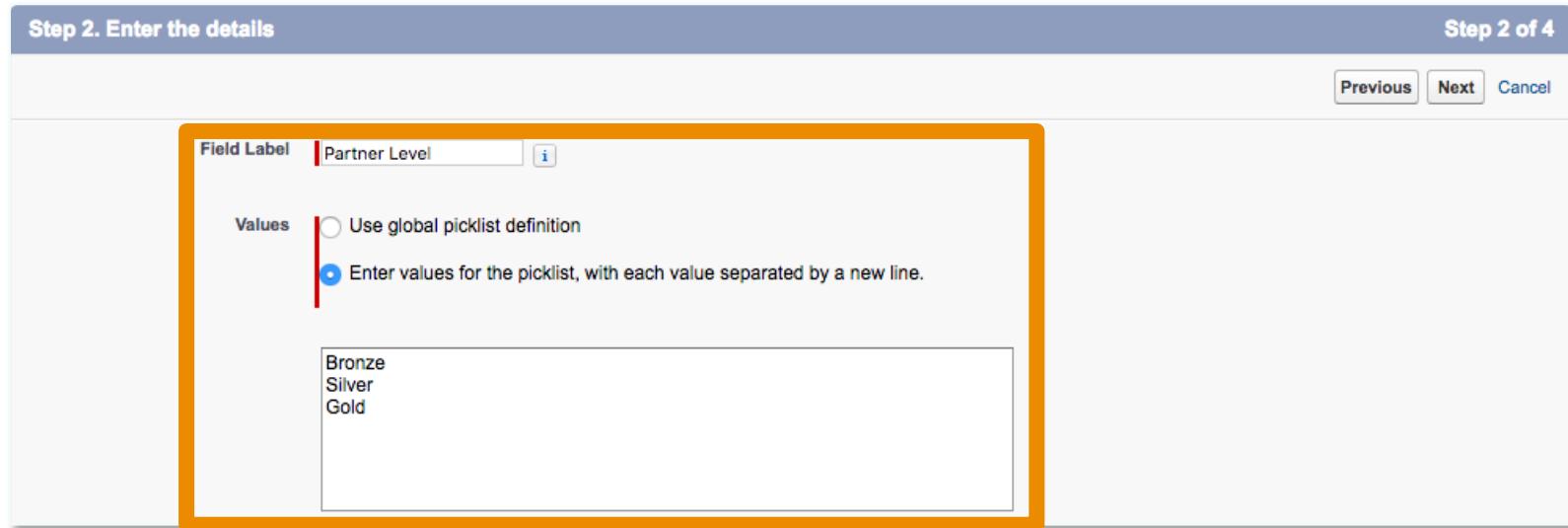
Create Object fields

Step 2. Enter the details Step 2 of 4

Field Label Partner Level [i](#)

Values Use global picklist definition Enter values for the picklist, with each value separated by a new line.

Bronze
Silver
Gold



Lookup Object

Implementation Process Overview

Create Object fields

Step 2. Enter the details Step 2 of 4

Field Label Product Family [i](#)

Values Use global picklist definition
 Enter values for the picklist, with each value separated by a new line.

Hardware
Software
Support



Lookup Object

Implementation Process Overview

Create Object fields

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	Partner Discount	i
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".		
Length	18	
Number of digits to the left of the decimal point		
Decimal Places	0	
Number of digits to the right of the decimal point		
Field Name	Partner_Discount	i

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

Create Object records

Information	
Partner Level	Bronze
Product Family	Hardware
Partner Discount	5
Owner	Brian Cloutier

Lookup Object

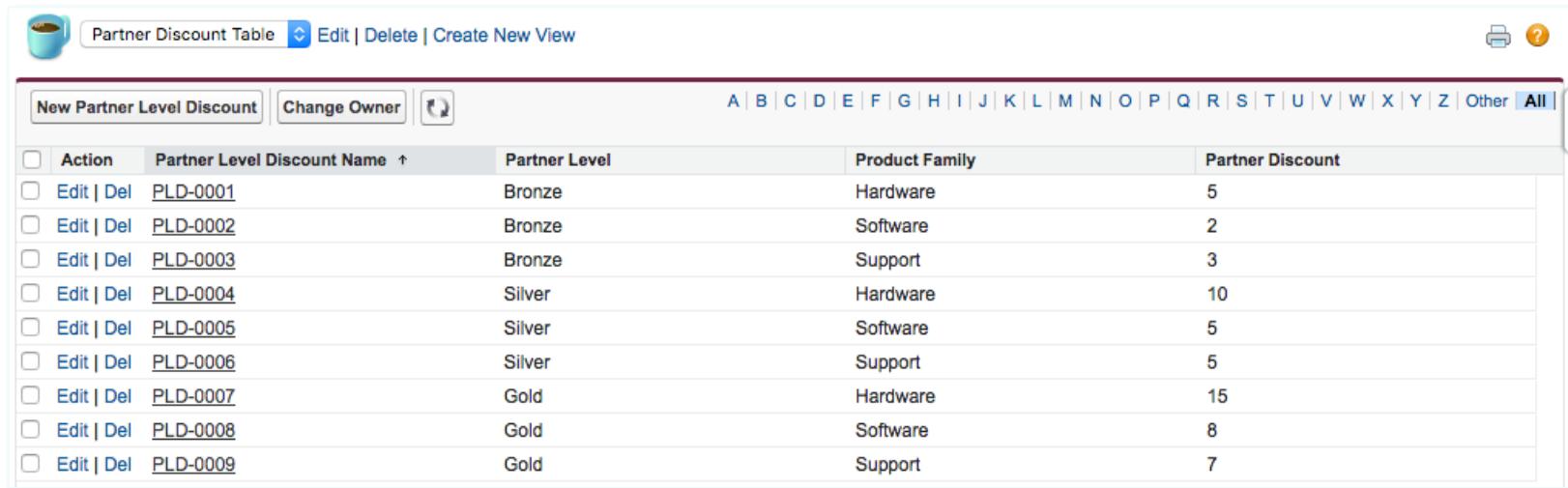
Implementation Process Overview

Create Object records

Partner Level Discount Name	Partner Level	Product Family	Partner Discount
PLD-0001	Bronze	Hardware	5
PLD-0002	Bronze	Software	2
PLD-0003	Bronze	Support	3
PLD-0004	Silver	Hardware	10
PLD-0005	Silver	Software	5
PLD-0006	Silver	Support	5
PLD-0007	Gold	Hardware	15
PLD-0008	Gold	Software	8
PLD-0009	Gold	Support	7

EX: Create a Lookup Object

Create a custom object to house partner level discount data for future reference



The screenshot shows a Salesforce interface for a custom object named "Partner Discount Table". The page includes a header with a coffee cup icon, a title bar with "Partner Discount Table", and navigation links for "Edit | Delete | Create New View". There are also icons for printing and help.

The main area displays a table with the following data:

Action	Partner Level Discount Name	Partner Level	Product Family	Partner Discount
Edit Del	PLD-0001	Bronze	Hardware	5
Edit Del	PLD-0002	Bronze	Software	2
Edit Del	PLD-0003	Bronze	Support	3
Edit Del	PLD-0004	Silver	Hardware	10
Edit Del	PLD-0005	Silver	Software	5
Edit Del	PLD-0006	Silver	Support	5
Edit Del	PLD-0007	Gold	Hardware	15
Edit Del	PLD-0008	Gold	Software	8
Edit Del	PLD-0009	Gold	Support	7

Partner Discount by Product Family Use Case

Account Detail Save Cancel

Account Owner	Admin User [Change]							
Account Name	MondoCorp [View Hierarchy]							
Parent Account								
Account Number								
Account Site	--None-- Bronze Silver Gold							
Partner Level								
Quantity	List Unit Price	Partner Discount	Partner Unit Price	Net Unit Price	Net Total			
1.00	\$75.00		\$1,800.00	\$1,800.00	\$1,800.00			
<input type="checkbox"/> 2 AP-TBDISPLAY Apple Thunderbolt Display	1.00	\$1,000.00		\$1,000.00	\$1,000.00			
#	Product Code	Product Name	Quantity	List Unit Price	Partner Discount	Partner Unit Price	Net Unit Price	Net Total
<input type="checkbox"/>	1 ADMINHOUR	Admin Hour	1.00	\$75.00	3.00	\$1,746.00	\$1,746.00	\$1,746.00
<input type="checkbox"/>	2 AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	5.00	\$950.00	\$950.00	\$950.00
#	Product Code	Product Name	Quantity	List Unit Price	Partner Discount	Partner Unit Price	Net Unit Price	Net Total
<input type="checkbox"/>	1 ADMINHOUR	Admin Hour	1.00	\$75.00	5.00	\$1,710.00	\$1,710.00	\$1,710.00
<input type="checkbox"/>	2 AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	10.00	\$900.00	\$900.00	\$900.00



Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is set on the account

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is set on the account

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

Information ! = Required Information

Price Rule Name <input type="text" value="Partner Discount by Product Family"/>	Active <input checked="" type="checkbox"/>
Evaluation Scope <input type="text" value="Calculator"/>	Evaluation Order <input type="text" value="60"/>
Conditions Met <input type="text" value="All"/>	Product <input type="text"/>
Calculator Evaluation Event	Available <input type="text" value="On Initialization"/> Chosen <input type="text" value="On Calculate"/>
Lookup Object <input type="text" value="Partner_Level_Discount__c"/>	

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is set on the account

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Condition

Information

Price Rule

Object

Field

Tested Variable

Tested Formula

Filter Information

Operator

Filter Type

Filter Value

Filter Variable

Filter Formula

= Required Information



Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is set on the account

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Lookup Queries

Information ■ = Required Information

Match Type ? Field Value ▼

Tested Object ? Quote Line ▼

Tested Field ? SBQQ_ProductFamily_c ▼

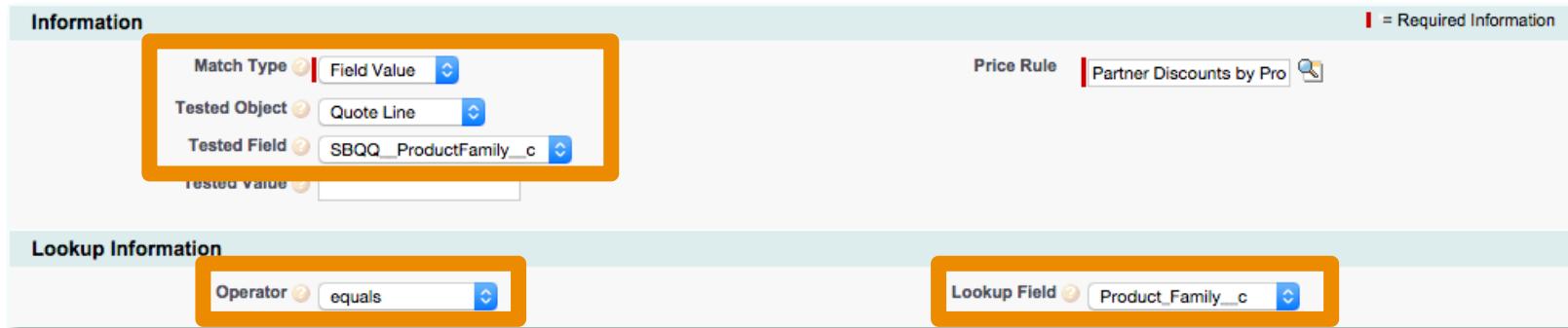
Tested Value ▼

Price Rule ? Partner Discounts by Pro 🔍

Lookup Information

Operator ? equals ▼

Lookup Field ? Product_Family_c ▼



Partner Discounts by Product Family

Implementation Process Overview

Create Lookup Queries

Information ■ = Required Information

Match Type Required

Tested Object Required

Tested Field Required

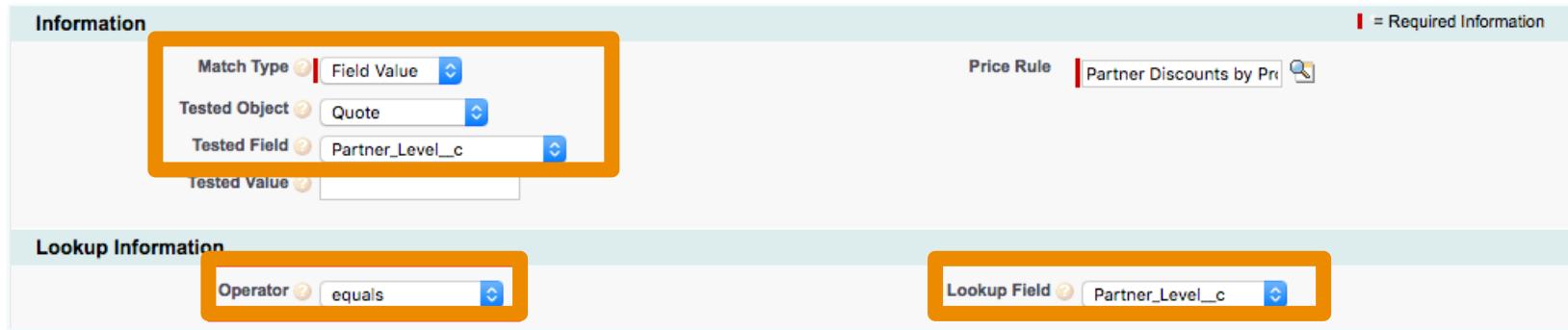
Tested Value

Price Rule Required

Lookup Information

Operator Required

Lookup Field Required



Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is set on the account

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Price Action

Information ■ = Required Information

Target Object <input type="text" value="Quote Line"/>	Rule <input type="text" value="Partner Discounts by Pr"/>
Target Field <input type="text" value="SBQQ_PartnerDiscount__c"/>	Order <input type="text" value="1"/>
Value <input type="text"/>	
Formula <input type="text"/>	

Price Action Sources

Source Field <input type="text"/>	Source Variable <input type="text"/>
Source Lookup Field <input type="text" value="Partner_Discount__c"/>	

EX: Partner Discounts by Product Family

Create a price rule that leverages a lookup object to apply a partner discount based on Product Family and Partner Level

Key Concepts

Pricing Rule (continued)

- Understand the Pricing Rule capabilities to support Lookup Objects
 - Lookup Object and Lookup Field fields
 - Tested Field and Target Field on the Price Action
- Related Knowledge Base Articles:
 - [Price Rules](#)
 - [Lookup Object / Table](#)



Quote Templates

Quote Template Use Case

Quotation				
Quote #:	Q-00011			
Date:	Jun 22, 2016			
Expires On:	Jul 22, 2016			
SALESPERSON	EXT	EMAIL	DELIVERY METHOD	PAYMENT TERMS
Korben Dallas MondoCorp 234 Second St Chicago, IL 60657 United States korben.dallas@gmail.com	x	kappap@salesforce.com		Net 30
QTY	PART #	DESCRIPTION	UNIT PRICE	DISC (%)
1.00	CLOUDSTORAGE		\$40.00	\$40.00
1.00	CLOUDSTORAGE		\$20.00	\$20.00
2.00	CLOUDSTORAGE		\$20.00	\$40.00
5.00	CLOUDSTORAGE		\$20.00	\$100.00
5.00	AP-MBPRO	15" Apple MacBook Pro (2016)	\$1,500.00	\$7,500.00
5.00	CPU28GZH7		\$250.00	\$1,250.00
5.00	RAM16GB		\$125.00	\$625.00
5.00	SSD512		\$150.00	\$750.00
5.00	AP-USKEYBOARD		\$50.00	\$250.00
5.00	AP-TBDISPLAY		\$1,000.00	\$5,000.00
1.00	LJ-PRINTER		\$275.00	\$275.00
1.00	LJ-TONER		\$125.00	\$125.00
1.00	LJ-MAINTKIT		\$20.00	\$20.00
1.00	WIFIROUTER		\$100.00	\$100.00
1.00	WIFIP		\$60.00	\$60.00
1.00	WIFINSTAL		\$300.00	\$300.00
1.00	LOWARRANTY		\$643.75	\$1,931.25
5.00	MS-OFFICE365		\$10.00	\$1,800.00
10.00	ADMIN-HOUR		\$75.00	\$72,000.00
TOTAL:				\$47,196.25

Terms & Conditions

This quote is presented to the customer under the condition that it remains a valid quote for only 15 days after the stated Quote Date, after which the quote becomes null and void.

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritas et quasi architecto beatae vitae dictis sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magna aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi

Page 1 of 2

ut aliquid ex ea commodi consequatur? Quia autem vel cum lura reprehendunt qui in ea voluntate vel esse quam nihil molestias consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla peritur?
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed ut etiam eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit animi, id est laborum.
At vero eos et accusamus et iusto odio doloremque dolorem qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepti sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem semper levibus et安然若素。 Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit qui minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe evenant ut et voluptates repudiandae sint est, natus error sit voluptatis consequuntur rerum hic tendet a sepe delecta, ut at recensendis voluptatis mores alias consequatur aut perferendas doloribus asperiores repellat.

This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.



Quote Template Overview

There are five main steps to creating a functional quote template

1. Creating a Quote Template
2. Storing your logo in Documents
3. Creating Template Content
4. Creating Template Sections
5. Creating Line Columns

Quote Template Structure

Quote Template Information

- Page Information
- Header/Footer Information
- Company Information
- Style Information
- Section Titles

Related Lists

- Line Columns
- Template Sections
- Additional Documents

Create a Quote Template

Implementation Process Overview

Create Quote Template

- Define basic company information and layout details

Create a Quote Template

Create Quote Template

Information	
Template Name	Training Proposal
Deployment Status	In Development
Generator Name	
Default <input type="checkbox"/>	
Logo Document Id	
Watermark ID	
Page Information	
Page Width	8.50
Top Margin	0.50
Left Margin	0.50
Page Height	11.00
Bottom Margin	0.50
Right Margin	0.50
Corporate Information	
Company Name	SteelBrick
Company Slogan	Next Generation Quote-to-Cash
Company Phone	(650) 627-7030
Company Fax	
Company Email	info@steelbrick.com
Company Street	1730 S El Camino Real
Company City	San Mateo
Company State	CA
Company Postal Code	94402
Company Country	United States

EX: Create a Quote Template

SteelBrick
Next Generation Quote-to-Cash

1730 S El Camino Real, San Mateo, CA 94402, United States
Phone: (650) 627-7030 Fax:
Email: info@steelbrick.com

Ship To:
Koren Dallas
MondoCorp
234 Second St
Chicago, IL 60657
United States
koren.dallas@gmail.com

Quotation

Quote #: Q-00011
Date: Jun 22, 2016
Expires On: Jul 22, 2016

SALESPERSON	EXT	EMAIL	DELIVERY METHOD	PAYMENT TERMS
Admin User	x	kapp@salesforce.com		Net 30

QTY	PART #	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
1.00	CLOUDSTORAGE		\$40.00		\$40.00
1.00	CLOUDSTORAGE		\$20.00		\$20.00
2.00	CLOUDSTORAGE		\$20.00		\$40.00
5.00	CLOUDSTORAGE		\$20.00		\$100.00
5.00	AP-MBPRO	15" Apple MacBook Pro (2016)	\$1,500.00		\$7,500.00
5.00	CPU20GHZ7		\$290.00		\$1,450.00
5.00	RAM16GB		\$125.00		\$625.00
5.00	SSD512		\$150.00		\$750.00
5.00	AP-KEYBOARD		\$50.00		\$250.00
5.00	AP-TDISPLAY		\$1,000.00		\$5,000.00
1.00	LJ-PRINTER		\$275.00		\$275.00
1.00	LJ-TONER		\$125.00		\$125.00
1.00	LJ-MANTIKIT		\$20.00		\$20.00
1.00	WIFROUTER		\$100.00		\$100.00
1.00	WIFIAP		\$80.00		\$80.00
1.00	WIFINSTALL		\$300.00		\$300.00
1.00	LOWARRANTY		\$64.75		\$64.75
5.00	MS-OFFICE365		\$10.00		\$1,800.00
10.00	ADMINHOUR		\$75.00		\$750.00
TOTAL:					\$47,186.25

Terms & Conditions

This quote is presented to the customer under the condition that it remains a valid quote for only 15 days after the stated Quote Date, after which the quote becomes null and void.

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi nonnulla sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia nonnumquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi

Page 1 of 2

ut aliquid ex ea commoda consequat? Quis autem vel eum luge repperendit qui in ea voluptate velit esse quam nihil molestias consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla paratur?

Quisne ipsum dolor sit amet, consectetur adipisci velit, sed ut eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis nisi ut aliquip ex ea commodo consequat. Duis autem vel eetur in rebus primis invenitur, et iusto odio cum quod esse illum dolorem eum fugiat quo voluptas nulla paratur.

Ali vero eis et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque coriacti quod dolores et quae molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem sunt facilis et expedita distinctio.

Nam liber tempore cum quida nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placet facere possimus, omnis volutes assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet ut et volutes repudiandae sint et molestiae non recusandae. Itaque earum rerum hic tenetur a sapiente delectus, ut aut reiciens voluptatibus maiores alias consequuntur aut perferendis doloribus asperiores repellat.

This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.

Signature: _____ Effective Date: _____ / _____ / _____
Name (Print): _____ Title: _____

Please sign and email to Admin User: at kapp@salesforce.com

THANK YOU FOR YOUR BUSINESS!

Page 2 of 2



Upload Logo File


SteelBrick
Next Generation Quote-to-Cash

1730 S El Camino Real, San Mateo, CA 94402, United States
Phone: (650) 627-7030 Fax:
Email: info@steelbrick.com

Ship To: Korben Dallas
MicroCorp
224 Second St
Chicago, IL 60657
United States
korben.dallas@gmail.com

Bill To: MicroCorp
224 Second St
Chicago, IL 60657
United States

SALESPERSON	EXT	EMAIL	DELIVERY METHOD	PAYMENT TERMS
Admin User	x	kapp@salesforce.com		Net 30

QTY	PART #	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
1.00	CLOUDSTOR4GE		\$40.00		\$40.00
1.00	CLOUDSTOR4GE		\$20.00		\$20.00
2.00	CLOUDSTOR4GE		\$20.00		\$40.00
5.00	CLOUDSTOR4GE		\$20.00		\$100.00
5.00	AP-MBPRO	15" Apple MacBook Pro (2016)	\$1,500.00		\$7,500.00
5.00	CPU28GHZ27		\$250.00		\$1,250.00
5.00	RAM16GB		\$125.00		\$625.00
5.00	SSD512		\$150.00		\$750.00
5.00	AP-USKEYBOARD		\$50.00		\$250.00
5.00	AP-TBDISPLAY		\$1,000.00		\$5,000.00
1.00	LJ-PRINTER		\$275.00		\$275.00
1.00	LJ-TONER		\$125.00		\$125.00
1.00	LJ-MAINTKIT		\$20.00		\$20.00
1.00	WIFIROUTER		\$100.00		\$100.00
1.00	WIFIAP		\$60.00		\$60.00
1.00	WIFIINSTALL		\$300.00		\$300.00
1.00	LOWWARRANTY		\$643.75		\$1,381.25
5.00	MS-OFFICE365		\$10.00		\$1,800.00
10.00	ADMINHOUR		\$75.00		\$72,000.00
TOTAL:					\$47,186.25

Terms & Conditions

This quote is presented to the customer under the condition that it remains a valid quote for only 15 days after the stated Quote Date, after which the quote becomes null and void.

Upload Logo File

Implementation Process Overview

Create Document and copy SFID

- Makes logo file externally available to document renderer



Update Quote Template field

- References logo SFID

Upload Logo File

Implementation Process Overview

Create Document and copy SFID

- Makes logo file externally available to document renderer



Update Quote Template field

- References logo SFID

Upload Logo File

Implementation Process Overview

Create Document

1. Enter details = Required Information

Document Name	Company Logo
Document Unique Name	Company_Logo
Indicate Document is Internal	<input type="checkbox"/> i
Externally Available Image	<input checked="" type="checkbox"/>
Folder	Output Document Resources
Description	
Keywords	

← → C <https://na30.salesforce.com/01536000000LB5d>

Upload Logo File

Implementation Process Overview

Create Document and copy SFID

- Makes logo file externally available to document renderer



Update Quote Template field

- References logo SFID

Upload Logo File

Implementation Process Overview

Update Quote Template field

Quote Template

Training Proposal

[« Back to List: Documents](#)

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Line Columns \[5+\]](#) | [Sections \[0\]](#) | [Additional Documents \[0\]](#)

Quote Template Detail

Save	Cancel
Template Name	Training Proposal
Deployment Status	In Development
Generator Name	

Default

Logo Document Id 01536000000LB5d

Watermark ID

EX: Upload a Logo File

Add a logo to your output document

Add Draft Watermark

Quotation					
		Quote #:	Q-00011		
		Date:	Jun 22, 2016		
		Expires On:	Jul 22, 2016		
SteelBrick Next Generation Quote-to-Cash					
1730 S El Camino Real, San Mateo, CA 94402, United States Phone: (855) 827-7030 Fax: Email: info@steelbrick.com					
Bill To:					
Korben Dallas MondoCorp 234 Second St Chicago, IL 60657 United States korben.dallas@gmail.com		MondoCorp 234 Second St Chicago, IL 60657 United States			
SALESPERSON		EXT	EMAIL	DELIVERY METHOD	PAYMENT TERMS
Admin User		x	kpapp@salesforce.com		Net 30
QTY	PART #	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
1.00	CLOUDSTORGE		\$40.00		\$40.00
1.00	CLOUDSTORGE		\$20.00		\$20.00
2.00	CLOUDSTORGE		\$20.00		\$40.00
5.00	CLOUDSTORGE		\$20.00		\$100.00
5.00	AP-MBPRO15	15" Apple MacBook Pro (2016)	\$1,500.00		\$7,500.00
5.00	CPUP8GQD7		\$250.00		\$1,250.00
5.00	RAM16GB		\$125.00		\$625.00
5.00	SSDS12		\$150.00		\$750.00
5.00	AP-USKEYBOARD		\$50.00		\$250.00
5.00	AP-TBDISPLAY		\$1,000.00		\$5,000.00
1.00	LJ-PRINTER		\$275.00		\$275.00
1.00	LJ-TONER		\$125.00		\$125.00
1.00	LJ-MAINTKIT		\$20.00		\$20.00
1.00	WIFIROUTER		\$100.00		\$100.00
1.00	WIFIAP		\$60.00		\$60.00
1.00	WIFINSTALL		\$300.00		\$300.00
1.00	LDWARRANTY		\$643.75		\$1,931.25
6.00	MS-OFFICE365		\$10.00		\$1,800.00
10.00	ADMINHOUR		\$75.00		\$727.00
TOTAL:					\$47,186.25

DRAFT

Terms & Conditions

This quote is presented to the customer under the condition that it remains a valid quote for only 15 days after the stated Quote Date, after which the quote becomes null and void.

Sed ut perspicaciis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, esque ipsa quae ab illo inventore vertatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsum volutatem quia voluptas sit aspernatur aut odit aut fugit, sed quis doloremque magnum vellet non eos qui relictorum volutatem sequi resurunt. Neque porro eiusmodi qui relictum quia voluntate, adspicitur velit, sed quia non numquam eius modi tempora incident ut labore et dolore magna aliquip ex ea commodo consequat? Quis autem vel eum lire reprehenderit in ea voluptate velit esse nihil molestiae consequatur, vel illum qui doloremque sequitur, nisi priorem.

Alioquin est et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluntatum delenti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem similitudinibus.

At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluntatum delenti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. Et harum quidem similitudinibus.

Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet ut et voluptates recusandae sunt perferendis debet, et ea temere omnia rerum eum harum hic tenetur a sapiente delectus, ut et recedens voluptatis maiores alias consequatur aut perferendis debet, et asperiores ipsorum.

This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.



Add Draft Watermark

Implementation Process Overview

Update Quote Template field

- References watermark SFID



Update Quote layout

- Allows users to see Watermark Shown field

Add Draft Watermark

Implementation Process Overview

Update Quote Template field

- References watermark SFID

Update Quote layout

- Allows users to see Watermark Shown field

Add Draft Watermark

Implementation Process Overview

Update Quote Template field

The screenshot shows the 'Quote Template Detail' page for a template named 'Training Proposal'. The page includes fields for 'Template Name' (Training Proposal), 'Deployment Status' (In Development), and 'Generator Name'. On the right side, there are sections for 'Default' (with a checkbox), 'Logo Document ID' (01536000001UINB), and 'Watermark ID' (01536000001dJ2V). The 'Watermark ID' field is highlighted with a red box.

Quote Template
Training Proposal

Customize Page | Edit Layout | Printable View | Help for this Page ?

« Back to List: Documents

Line Columns [5+] | Sections [0] | Additional Documents [0] | DocuSign Recipients [0]

Quote Template Detail

Save Cancel

Template Name Training Proposal

Deployment Status In Development

Generator Name

Default

Logo Document ID 01536000001UINB

Watermark ID 01536000001dJ2V

Add Draft Watermark

Implementation Process Overview

Update Quote Template field

- References watermark SFID



Update Quote layout

- Allows users to see Watermark Shown field

Add Draft Watermark

Implementation Process Overview

Update Quote layout

Discount Information	
Additional Disc. (%)	451.39%
Avg. Customer Disc. (%)	8,146.7%
Total Customer Disc. Amount	\$123.45
Partner Discount	40.47%
Avg. Partner Disc. (%)	7,378.1%
Addl. Disc. Amount	\$123.45
Quote Options	
Group Line Items	<input checked="" type="checkbox"/>
Print Line Items <input checked="" type="checkbox"/>	
Watermark Shown <input checked="" type="checkbox"/>	
Address Information	
Bill To Name	Sample Bill To Name
Bill To Street	Sample Bill To Street
Ship To Name	Sample Ship To Name
Ship To Street	Sample Ship To Street

EX: Add Draft Watermark

Add a draft watermark to your output document and the controlling field to the quote layout

Add Additional Documents

Q-00011

Preview Document

Document Options

Template ? Training Proposal ▼

Additional Documents

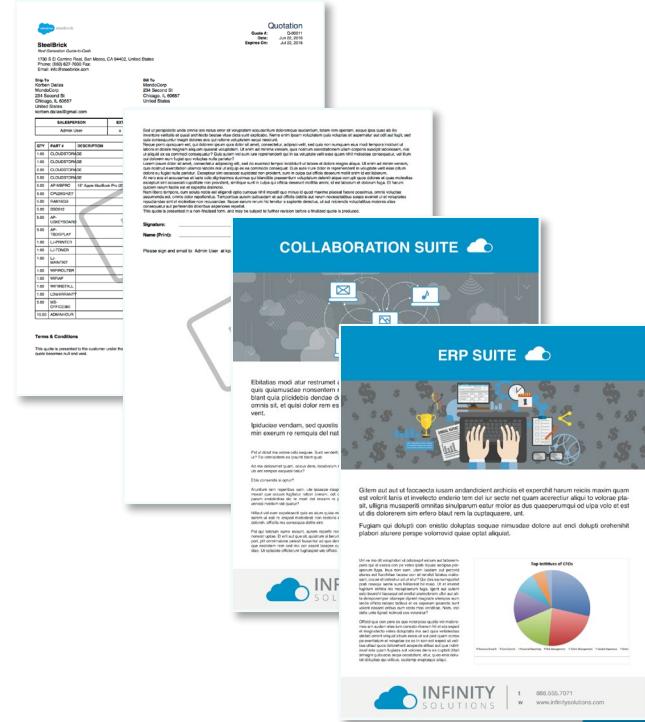
Available Content ?

- Quote Template: Collaboration Suite Data Sheet
- Quote Template: ERP Suite Data Sheet.pdf

Included Content

Quote Document

Can also source Additional Documents from Product, Quote, Opportunity



Add Additional Documents

Implementation Process Overview

Create Additional Document

- References SFID of an existing Salesforce document record

Add Additional Documents

Implementation Process Overview

Create Additional Document

Information		<small>■ = Required Information</small>
External Id	01536000001dJ2Y	
Document Name	Collaboration Suite Data	
Display Order	10	
Quote Template	Training Proposal	
Required	<input type="checkbox"/>	
<small>Save Cancel</small>		

EX: Add Additional Documents

Add two user-selectable documents to your output document

Key Concepts

Quote Template

- Understand how to add an attachment to the document generation
- Understand when it's appropriate to check the "Watermark Shown" quote field
- Related Knowledge Base Articles:
 - [Generate Documents](#)
 - [Draft Watermark Added to Quote PDF](#)



Template Sections

Template Content Basics

Content driven by HTML markup

For layout and branding of the content in HTML sections

Types of Template Content

- HTML
- Line Items
- Quote Terms
- Template Top
- Template Bottom
- Custom

Assemble Custom Document

**INFINITY
SOLUTIONS**

**Software Solution
Proposal For
MondoCorp**

Even simple business processes can expose a firm to financial and legal risks. The more complex your business, the greater effect inaccurate data and ineffective reporting may have on your business process as well as your company's bottom line.

DRAFT

Page 1 of 4

**INFINITY
SOLUTIONS**

1730 S El Camino Real
San Mateo, CA 94402
Phone: (650) 627-7000
Email: info@steelbrick.com

DRAFT

Page 2 of 4

**INFINITY
SOLUTIONS**

1730 S El Camino Real
San Mateo, CA 94402
Phone: (650) 627-7000
Email: info@steelbrick.com

Prepared For:
MondoCorp
23rd Second St
Chicago, IL 60667
United States

QTY	PART #	DESCRIPTION
1.00	CLOUDSTORAGE	
1.00	CLOUDSTORAGE	
2.00	CLOUDSTORAGE	
5.00	CLOUDSTORAGE	
5.00	AP-MBPRO	15' Apple MacBook Pro (2016)
5.00	CPUBGKZ17	
5.00	RAM16GB	
5.00	SSDS12	
5.00	AP-USKEYBOARD	
5.00	AP-TBDISPLAY	
1.00	LJ-PRINTER	
1.00	LJ-TONER	
1.00	LJ-MAINTKIT	
1.00	WIFIROUTER	
1.00	WIFIAP	
1.00	WIFINSTALL	
1.00	LDWARRANTY	
5.00	MS-OFFICE365	
10.00	ADMINHOUR	

Please fax a signed copy of this SO and other referenced documents to and mail two sets of original to:
Steelbrick
Attn: Legal Contracts
1730 S El Camino Real
San Mateo, CA 94402

DRAFT

Page 3 of 4

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives whose signatures appear below.

SteelBrick	MondoCorp
Signature: _____	Signature: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Dated: _____	Dated: _____

DRAFT

Page 4 of 4

Assemble Custom Document

Implementation Process Overview

Create Template Sections

- References provided training template content

Assemble Custom Document

Implementation Process Overview

Create Template Sections

Information = Required Information

Section Name <input type="text" value="Cover Page"/>	Template <input type="text" value="Training Proposal"/> 
Top Margin <input type="text" value="0.00"/>	Content <input type="text" value="Bootcamp Cover Page"/> 
Display Order <input type="text" value="10"/>	Bottom Margin <input type="text" value="0.00"/>
Conditional Print Field <input type="text" value="--None--"/>	Summary Display <input type="text" value="--None--"/>
Print Quote Totals <input type="checkbox"/>	Group Field <input type="text" value="--None--"/>
Roll-Up Field <input type="text" value="--None--"/>	Border Color <input type="text"/>
Hide Column Header <input type="checkbox"/>	

EX: Assemble Custom Document

Create sections for the following template content:

- Training Cover Page (display order 10)
- Training Cover Letter (display order 20, set page break to Before)
- Training Tail Header (display order 30, set page break to Before)
- Training Prepared For (display order 40)
- Training Line Items (display order 50)
- Training Signature Block (display order 70)



Key Concepts

Quote Template (continued)

- Understand the Template Section assembly process
 - Roll-up field settings
 - Show All Package Products
 - Show Bundled Products
 - Hide Component Products
 - Group defining capabilities
- Understand the Template Content assembly process
- Related Knowledge Base Articles:
 - [Create Template Sections](#)
 - [Create Template Content](#)

Line Item Section

Adjust Line Columns

INFINITY SOLUTIONS

Proposal Q-00011-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

Prepared For:
MondoCorp
294 Second St
Chicago, IL 60657
United States

Prepared By:
Admin User
kpapp@salesforce.com

QTY	PART #	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
5.00	AP-MBPRO	15" Apple MacBook Pro (2016)	\$1,500.00		\$7,500.00
5.00	CPU28GHz7		\$250.00		\$1,250.00
5.00	RAM16GB		\$125.00		\$625.00
5.00	SSD512		\$150.00		\$750.00
5.00	AP-USKEYBOARD		\$50.00		\$250.00
5.00	AP-TBDISPLAY		\$1,000.00		\$5,000.00
1.00	LI-PRINTER		\$275.00		\$275.00
1.00	LI-TONER		\$125.00		\$125.00
1.00	LI-MANTKIT		\$20.00		\$20.00
1.00	WIFIROUTER		\$100.00		\$100.00
1.00	WIFIAP		\$60.00		\$60.00
1.00	WIFIINSTALL		\$300.00		\$300.00
1.00	LOWARRANTY		\$643.75		\$1,931.25
5.00	MS-OFFICE365		\$10.00		\$1,800.00
10.00	ADMINHOUR		\$75.00		\$72,000.00
TOTAL:					\$46,986.25

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:
SteelBrick
Attn: Sales Contracts
1730 S El Camino Real
San Mateo, CA 94402

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives whose signatures appear below.

SteelBrick **MondoCorp**

Page 3 of 4

INFINITY SOLUTIONS

Proposal Q-00011-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

Prepared For:
MondoCorp
294 Second St
Chicago, IL 60657
United States

Prepared By:
Admin User
kpapp@salesforce.com

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
5.00	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00		\$7,500.00
5.00	CPU 2.8GHz i7		\$250.00		\$1,250.00
5.00	RAM 16GB		\$125.00		\$625.00
5.00	SSD Hard Drive 512GB		\$150.00		\$750.00
5.00	Apple US Keyboard		\$50.00		\$250.00
5.00	Apple Thunderbolt Display		\$1,000.00		\$5,000.00
1.00	LaserJet Printer		\$275.00		\$275.00
1.00	LaserJet Toner Cartridge		\$125.00		\$125.00
1.00	LaserJet Maintenance Kit		\$20.00		\$20.00
1.00	WiFi Router		\$100.00		\$100.00
1.00	WiFi Access Point		\$60.00		\$60.00
1.00	WiFi Installation		\$60.00		\$60.00
1.00	Loss and Damage Warranty		\$643.75		\$1,931.25
5.00	Microsoft Office 365		\$10.00		\$1,800.00
10.00	Admin Hour		\$75.00		\$72,000.00
TOTAL:					\$46,986.25

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:
SteelBrick
Attn: Sales Contracts
1730 S El Camino Real
San Mateo, CA 94402

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SteelBrick **MondoCorp**

Signature: _____ Signature: _____

Page 3 of 4



Adjust Line Columns

Implementation Process Overview

Update Line Columns

- Change Part # and Description records to show full product name

Adjust Line Columns

Implementation Process Overview

Update Line Columns

Information = Required Information

Column Heading	PRODUCT
Display Order	20
Width	20.00
Section	

Template Training Proposal

Field Name	SBQQ_ProductName_c
Alignment	Left

Adjust Line Columns

Implementation Process Overview

Update Line Columns

Information = Required Information

Column Heading	<input type="text" value="DESCRIPTION"/>	Template	<input type="text" value="Training Proposal"/>
Display Order	<input type="text" value="30"/>	Field Name	<input type="text" value="SBQQ_Description_c"/>
Width	<input style="outline: 2px solid orange; border: 1px solid #ccc; border-radius: 5px; padding: 5px; width: 150px; height: 30px; font-size: 14px; font-family: inherit; margin-bottom: 5px;" type="text" value="40.00"/>	Alignment	<input type="text" value="Left"/>
Section	<input type="text"/>		

EX: Adjust Line Columns

Change the header and data of the Part # column, adjust columns sizes accordingly

Conditional Discount Column

INFINITY SOLUTIONS

1730 S El Camino Real
San Mateo, CA 94402
Phone: (650) 627-7030
Email: info@steelbrick.com

Proposal Q-00011-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

Prepared For:
MondoCorp
294 Second St
Chicago, IL 60657
United States

Prepared By:
Admin User
kpapp@salesforce.com

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
5.00	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00		\$7,500.00
5.00	CPU 2.8GHz i7		\$250.00		\$1,250.00
5.00	RAM 16GB		\$125.00		\$625.00
5.00	SSD Hard Drive 512GB		\$150.00		\$750.00
5.00	Apple US Keyboard		\$50.00		\$250.00
5.00	Apple Thunderbolt Display		\$1,000.00		\$5,000.00
1.00	LaserJet Printer		\$275.00		\$275.00
1.00	LaserJet Toner Cartridge		\$125.00		\$125.00
1.00	LaserJet Maintenance Kit		\$20.00		\$20.00
1.00	WiFi Router		\$100.00		\$100.00
1.00	WiFi Access Point		\$60.00		\$60.00
1.00	WiFi Installation		\$300.00		\$300.00
1.00	Loss and Damage Warranty		\$643.75		\$1,931.25
5.00	Microsoft Office 365		\$10.00		\$1,800.00
10.00	Admin Hour		\$75.00		\$775.00
TOTAL:					\$46,986.25

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:
SteelBrick
Attn: Sales Contracts
1730 S El Camino Real
San Mateo, CA 94402

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives whose signatures appear below.

SteelBrick
Signature: _____

MondoCorp
Signature: _____

Page 3 of 4

INFINITY SOLUTIONS

1730 S El Camino Real
San Mateo, CA 94402
Phone: (650) 627-7030
Email: info@steelbrick.com

Proposal Q-00011-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

Prepared For:
MondoCorp
294 Second St
Chicago, IL 60657
United States

Prepared By:
Admin User
kpapp@salesforce.com

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED	
5.00	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00	\$7,500.00	
5.00	CPU 2.8GHz i7		\$250.00	\$1,250.00	
5.00	RAM 16GB		\$125.00	\$625.00	
5.00	SSD Hard Drive 512GB		\$150.00	\$750.00	
5.00	Apple US Keyboard		\$50.00	\$250.00	
5.00	Apple Thunderbolt Display		\$1,000.00	\$5,000.00	
1.00	LaserJet Printer		\$275.00	\$275.00	
1.00	LaserJet Toner Cartridge		\$125.00	\$125.00	
1.00	LaserJet Maintenance Kit		\$20.00	\$20.00	
1.00	WiFi Router		\$100.00	\$100.00	
1.00	WiFi Access Point		\$60.00	\$60.00	
1.00	WiFi Installation		\$300.00	\$300.00	
1.00	Loss and Damage Warranty		\$643.75	\$1,931.25	
5.00	Microsoft Office 365		\$10.00	\$1,800.00	
10.00	Admin Hour		\$75.00	\$775.00	
TOTAL:					\$46,986.25

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:
SteelBrick
Attn: Sales Contracts
1730 S El Camino Real
San Mateo, CA 94402

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives whose signatures appear below.

SteelBrick
Signature: _____

MondoCorp
Signature: _____

Page 3 of 4



Conditional Discount Column

Implementation Process Overview

Update Line Column

- Uses SBQQ__AdditionalDiscountAmount__c to drive column visibility

Conditional Discount Column

Implementation Process Overview

Update Line Columns

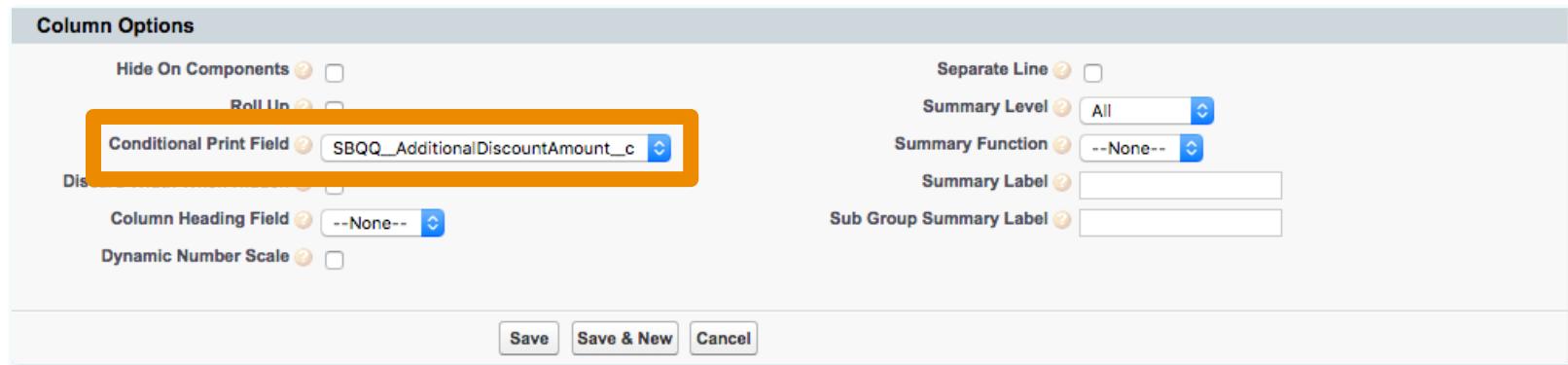
Column Options

Conditional Print Field: SBQQ__AdditionalDiscountAmount__c

Summary Level: All

Summary Function: --None--

Save, Save & New, Cancel



EX: Conditional Discount Column

Update the discount column to display only when a discount is present on any line item

Conditional Pricing Columns

Proposal Q-00011-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

1730 S El Camino Real
San Mateo, CA 94402
Phone: (650) 627-7030
Email: info@steelbrick.com

Prepared For:

Mono Corp
224 Second St
Chicago, IL 60657
United States

Prepared By:

Admin User:
kpapp@salesforce.com

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
5.00	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00	\$7,500.00
5.00	CPU 2.8GHz i7		\$250.00	\$1,250.00
5.00	RAM 16GB		\$125.00	\$625.00
5.00	SSD Hard Drive 512GB		\$150.00	\$750.00
5.00	Apple US Keyboard		\$50.00	\$250.00
5.00	Apple Thunderbolt Display		\$1,000.00	\$5,000.00
1.00	LaserJet Printer		\$75.00	\$75.00
1.00	LaserJet Toner Cartridge		\$125.00	\$125.00
1.00	LaserJet Maintenance Kit		\$20.00	\$20.00
1.00	WiFi Router		\$100.00	\$100.00
1.00	WiFi Access Point		\$60.00	\$60.00
1.00	WiFi Installation		\$300.00	\$300.00
1.00	Loss and Damage Warranty		\$643.75	\$1,931.25
5.00	Microsoft Office 365		\$10.00	\$1,800.00
10.00	Admin Hour		\$75.00	\$750.00
				TOTAL: \$46,986.25

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:

SteelBrick
Attn: Sales Contracts
1730 S El Camino Real
San Mateo, CA 94422

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives whose signatures appear below.

SteelBrick

Signature:

MondoCorp

Signature:

Page 3 of 4

Proposal Q-000111-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

1730 S El Camino Real
San Mateo, CA 94402
Phone: (650) 627-7030
Email: info@steelbrick.com

Prepared For:

MondoCorp
224 Randolph St
Chicago, IL 60657
United States

Prepared By:

Admin User
lpapp@salesforce.com

QTY	PRODUCT	DESCRIPTION
5.00	Apple MacBook Pro	15" Apple MacBook Pro (2016)
5.00	CPU 2.8GHz i7	
5.00	RAM 16GB	
5.00	SSD Hard Drive 512GB	
5.00	Apple US Keyboard	
5.00	Apple Thunderbolt Display	
1.00	LaserJet Printer	
1.00	LaserJet Toner Cartridge	
1.00	LaserJet Maintenance Kit	
1.00	WiFi Router	
1.00	WiFi Access Point	
1.00	WiFi Installation	
1.00	Loss and Damage Warranty	
5.00	Microsoft Office 365	
10.00	Admin Hour	
TOTAL:		\$46,966.25

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:

SteelBrick
Attn: Sales Contracts
1730 S El Camino Real
San Mateo, CA 94402

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives whose signatures appear below.

SteelBrick

Signature: _____

MondoCorp

Signature: _____

Page 3 of 4



Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

- Places Show_Pricing_Columns__c into the user interface



Update Line Columns

- Uses Show_Pricing_Columns__c to drive visibility of price columns

Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

- Places Show_Pricing_Columns__c into the user interface

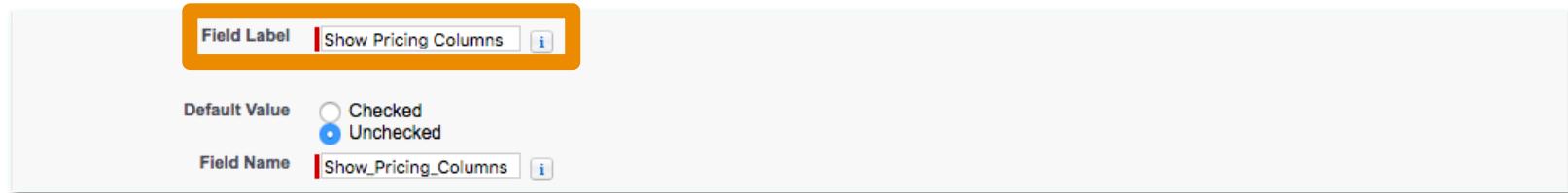
Update Line Columns

- Uses Show_Pricing_Columns__c to drive visibility of price columns

Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field



The screenshot shows a configuration interface for a new field. The field is a checkbox type, indicated by the orange border around the label and input area. The label is "Show Pricing Columns". The default value is set to "Unchecked", with the radio button being blue. The field name is "Show_Pricing_Columns".

Field Label	Show Pricing Columns	
Default Value	<input checked="" type="radio"/> Checked <input checked="" type="radio"/> Unchecked	
Field Name	Show_Pricing_Columns	

Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

- Places Show_Pricing_Columns__c into the user interface



Update Line Columns

- Uses Show_Pricing_Columns__c to drive visibility of price columns

Conditional Pricing Columns

Implementation Process Overview

Update Line Columns

Column Options

Conditional Print Field 

Summary Level 

Summary Function 

Summary Label

Sub Group Summary Label

Save Save & New Cancel

EX: Conditional Pricing Columns

Allow sales reps to remove pricing columns from line item table by using a controlling field on the quote

Conditional Line Item Tables

INFINITY SOLUTIONS

Proposal Q-00011-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

Prepared For:
MondoCorp
294 Second St
Chicago, IL 60657
United States

Prepared By:
Admin User
kpapp@salesforce.com

One-time				
QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
1.00	LaserJet Toner Cartridge		\$125.00	\$125.00
1.00	LaserJet Maintenance Kit		\$20.00	\$20.00
	Consumable Subtotal			\$145.00
5.00	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00	\$7,500.00
5.00	CPU 2.8GHz i7		\$250.00	\$1,250.00
5.00	RAM 16GB		\$125.00	\$625.00
5.00	SSD Hard Drive 512GB		\$150.00	\$750.00
5.00	Apple US Keyboard		\$80.00	\$400.00
5.00	Apple Thunderbolt Display		\$1,000.00	\$5,000.00
1.00	LaserJet Printer		\$275.00	\$275.00
1.00	WiFi Router		\$100.00	\$100.00
1.00	WiFi Access Point		\$80.00	\$80.00
	Hardware Subtotal			\$15,810.00
1.00	WiFi Installation		\$300.00	\$300.00
	Service Subtotal			\$300.00
	One-time Subtotal			\$16,255.00
One-time TOTAL: \$16,255.00				

Subscription				
QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
5.00	Microsoft Office 365		\$10.00	\$1,800.00
	Software Subtotal			\$1,800.00
1.00	Loss & Damage Warranty		\$843.75	\$1,931.25
10.00	Admin Hour		\$75.00	\$27,000.00

Page 3 of 4

INFINITY SOLUTIONS

Proposal Q-00011-1

Date: 6/22/2016 11:17 AM
Expires On: 7/22/2016

Prepared For:
MondoCorp
294 Second St
Chicago, IL 60657
United States

Prepared By:
Admin User
kpapp@salesforce.com

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
1.00	LaserJet Toner Cartridge		\$125.00	\$125.00
1.00	LaserJet Maintenance Kit		\$20.00	\$20.00
	Consumable Subtotal			\$145.00
5.00	Apple MacBook Pro	15" Apple MacBook Pro (2016)	\$1,500.00	\$7,500.00
5.00	CPU 2.8GHz i7		\$250.00	\$1,250.00
5.00	RAM 16GB		\$125.00	\$625.00
5.00	SSD Hard Drive 512GB		\$150.00	\$750.00
5.00	Apple US Keyboard		\$80.00	\$400.00
5.00	Apple Thunderbolt Display		\$1,000.00	\$5,000.00
1.00	LaserJet Printer		\$275.00	\$275.00
1.00	WiFi Router		\$100.00	\$100.00
1.00	WiFi Access Point		\$80.00	\$80.00
	Hardware Subtotal			\$15,810.00
1.00	WiFi Installation		\$300.00	\$300.00
	Service Subtotal			\$300.00
5.00	Microsoft Office 365		\$10.00	\$1,800.00
	Software Subtotal			\$1,800.00
1.00	Loss and Damage Warranty		\$643.75	\$1,931.25
10.00	Admin Hour		\$75.00	\$27,000.00
	Support Subtotal			\$28,931.25
	Subtotal			\$46,986.25

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:
Steelbrick
Attn: Sales Contracts
1730 S El Camino Real
San Mateo, CA 94402

Page 3 of 4

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

Field Label	Separate by Subscription Type	i
Default Value	<input type="radio"/> Checked <input checked="" type="radio"/> Unchecked	i
Field Name	Separate_by_Subscription_Type	i

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

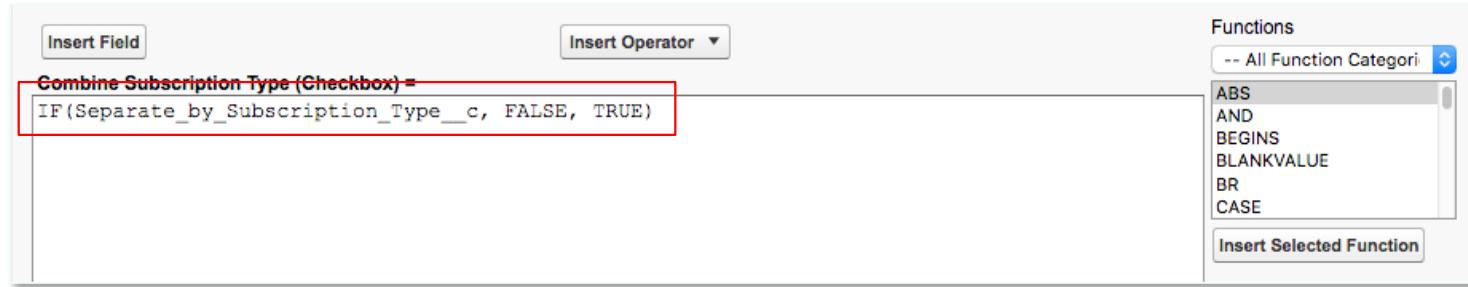
Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox formula field



The screenshot shows the Salesforce formula editor. At the top, there are buttons for "Insert Field" and "Insert Operator". To the right, a "Functions" panel is open under the heading "All Function Categories". The panel lists several functions: ABS, AND, BEGINS, BLANKVALUE, BR, CASE, and an "Insert Selected Function" button at the bottom. A red box highlights the formula text area, which contains the following code:

```
Combine Subscription Type (Checkbox) =  
IF(Separate_by_Subscription_Type__c, FALSE, TRUE)
```

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Update Template Section

Information = Required Information

Section Name <input type="text" value="Line Items"/>	Template <input type="text" value="Training Proposal"/>
Top Margin <input type="text" value="0.00"/>	Content <input type="text" value="Bootcamp Line Items"/> 
Display Order <input type="text" value="50"/>	Bottom Margin <input type="text" value="0.00"/>
Conditional Print Field <input type="text" value="Separate_by_Subscription_Type__c"/> 	Summary Display <input type="text" value="--None--"/> 
<input type="checkbox"/> Print Quote Totals	<input type="text" value="Subscription_Type__c"/> 
Roll-Up Field <input type="text" value="--None--"/> 	Border Color <input type="text"/>
<input type="checkbox"/> Hide Column Header	

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Clone Template Section and Update Fields

Information = Required Information

Section Name <input type="text" value="Combined Line Items"/>	Template <input type="text" value="Training Proposal"/> 
Top Margin <input type="text" value="0.00"/>	Content <input type="text" value="Bootcamp Line Items"/> 
Display Order <input type="text" value="51"/>	Bottom Margin <input type="text" value="0.00"/>
Conditional Print Field <input type="text" value="Combine_Subscription_Type_c"/> 	Summary Display <input type="text" value="--None--"/> 
Print Quote Totals <input type="checkbox"/>	Group Field <input type="text" value="--None--"/> 
Roll-Up Field <input type="text" value="--None--"/> 	Border Color <input type="text"/> 

EX: Conditional Line Item Tables

Allow sales reps to choose whether or not the line item table will be separated by subscription type

Key Concepts

Quote Template (continued)

- Understand how to conditionally display Line Columns and Sections
 - Conditional Print Field
- Related Knowledge Base Articles:
 - [Dynamically Displaying Quote Line Columns](#)



Quote Terms

AM

AM

Quote Terms Section

Terms and Conditions

This quote is presented to the customer under the condition that it remains a valid quote for only 15 days after the stated Quote Date, after which the quote becomes null and void.

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusamus etLorem ipsum dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magna aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

Unde omnis iste natus error sit voluptatem accusamus et ea commodo consequatur. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupiditate non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quod dolores et quae molestias excepturi sint occaecati ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur. Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:

SteelBrick
Attn: Sales Contracts
1736 S El Camino Real
San Mateo, CA 94402

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives whose signatures appear below.

DRAFT

SteelBrick	MondoCorp
Signature: _____	Signature: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Dated: _____	Dated: _____

Page 4 of 4

CONFIDENTIAL

Quote Terms Section

Implementation Process Overview

Create Template Content

- Makes a new piece of template content to display quote terms



Create Template Sections

- Places Terms Header and Terms content after subtotals

Quote Terms Section

Implementation Process Overview

Create Template Content

- Makes a new piece of template content to display quote terms

Create Template Sections

- Places Terms Header and Terms content after subtotals

Quote Terms Section

Implementation Process Overview

Create Template Content

Type of this content.

HTML
 Line Items
 Quote Terms
 Custom
 Template Bottom
 Template Top

Continue **Cancel**

Template Content | = Required Information

Content Name	Quote Terms	Type	Quote Terms
Font Family	--None--	Font Size	<input type="text"/>
Text Color	<input type="text"/>		

Quote Terms Section

Implementation Process Overview

Create Template Content

- Makes a new piece of template content to display quote terms



Create Template Sections

- Places Terms Header and Terms content after subtotals

Quote Terms Section

Implementation Process Overview

Create Template Sections

Information = Required Information

Section Name <input type="text" value="Terms Header"/>	Template <input type="text" value="Training Proposal"/> 
Top Margin <input type="text" value="0.00"/>	Content <input type="text" value="Bootcamp Terms Header"/> 
Display Order <input type="text" value="60"/>	Bottom Margin <input type="text" value="0.00"/>
Conditional Print Field <input type="text" value="--None--"/>	Summary Display <input type="text" value="--None--"/>
Print Quote Totals <input type="checkbox"/>	Group Field <input type="text" value="--None--"/>
Roll-Up Field <input type="text" value="--None--"/>	Border Color <input type="text"/>
Hide Column Header <input type="checkbox"/>	

Page Breaks

Page Break <input type="text" value="Before"/>	Keep Together <input type="text" value="Auto"/>
Keep With Previous <input type="text" value="--None--"/>	Keep With Next <input type="text" value="Auto"/>

Quote Terms Section

Implementation Process Overview

Create Template Sections

Information = Required Information

Section Name <input type="text" value="Quote Terms"/>	Template <input type="text" value="Training Proposal"/> 
Top Margin <input type="text" value="0.00"/>	Content <input type="text" value="Quote Terms"/> 
Display Order <input type="text" value="61"/>	Bottom Margin <input type="text" value="0.00"/>
Conditional Print Field <input type="text" value="--None--"/>	Summary Display <input type="text" value="--None--"/>
Print Quote Totals <input type="checkbox"/>	Group Field <input type="text" value="--None--"/>
Roll-Up Field <input type="text" value="--None--"/>	Border Color <input type="text"/>
Hide Column Header <input type="checkbox"/>	

EX: Quote Terms Section

Update the quote template to include a terms and conditions section, starting on a new page immediately following the quote totals

Quote Terms with Merge Fields



Quote Term with Merge Fields

Implementation Process Overview

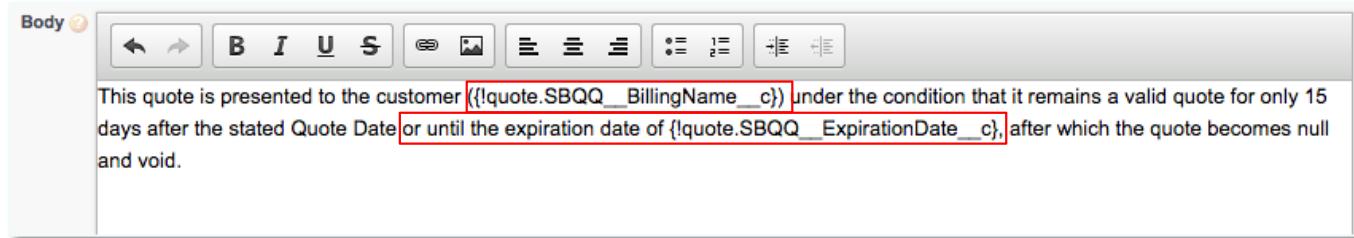
Update Quote Term

- Replaces static text with merge fields

Quote Term with Merge Fields

Implementation Process Overview

Update Quote Term



EX: Quote Term with Merge Fields

Update the first quote term to include data pulled from quote fields

Conditional Quote Term

Terms and Conditions

This quote is presented to the customer (MondoCorp) under the condition that it remains a valid quote for only 15 days after the stated Quote Date or until the expiration date of 7/22/2016, after which the quote becomes null and void.
Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusamus et iusto odio corporis laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi dolores ecco qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consecetur, adipisci velit, sed quis non numquam eius modi tempora incidunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Quis autem vel eum iure reprehenderit qui in voluptate vel esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?
Unde omnes sit at animi constitutus adipiscitur eis, sed et do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate vel esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluntatum delenit atque corrupti quod dolores et quae molestias excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime placeat facere possimus, omnes voluptates assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe eveniet et vel voluptates repudiandae sint et molestiae non recusanda, itaque earum rerum tenetur a sapiente delectus. Ut ac reciendis voluptatibus misterios et
consequatur aut perferendis doloribus asperiores repellat.

This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.

Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:

Steelbrick
Attn: Sales Contracts
1730 S El Ca
San Mateo, C

IN WITNESS
signatures to
Please fax a signed copy of this SO and other referenced documents to and mail two sets of originals to:

Steelbrick
Attn: Sales Contracts
Sig _____
Printed Name: _____
Title: _____
Dated: _____

Printed Name: _____
Title: _____
Dated: _____

Conditional Quote Term

Implementation Process Overview

Create Quote Term

- Makes a new quote term to appear after all others



Create Term Condition

- Uses SBQQ_Status__c to drive quote term visibility

Conditional Quote Term

Implementation Process Overview

Create Quote Term

- Makes a new quote term to appear after all others



Create Term Condition

- Uses SBQQ__Status__c to drive quote term visibility

Conditional Quote Term

Implementation Process Overview

Create Quote Term

Information = Required Information

Print Order 50	Active <input checked="" type="checkbox"/>
Status Draft	Owner Brian Cloutier
Parent Term 	Quote 
Conditions Met All	Standard Term 
Body This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.	

Conditional Quote Term

Implementation Process Overview

Create Quote Term

- Makes a new quote term to appear after all others



Create Term Condition

- Uses SBQQ__Status__c to drive quote term visibility

Conditional Quote Term

Implementation Process Overview

Create Term Condition

Information ■ = Required Information

Quote Term <input type="text" value="QT-0006"/>	Operator <input type="text" value="equals"/>
Tested Field <input type="text" value="SBQQ_Status__c"/>	Value <input type="text" value="Draft,In Review,Denied"/>
Tested Variable <input type="text"/>	

EX: Conditional Quote Term

Create a quote term that appears only when the quote status is Draft, In Review, or Denied

Key Concepts

Quote Terms

- Understand Quote Term assembly process
 - Create Quote Term Template Content then create new Template Section
- Understand how to make Quote Terms conditional
 - Quote Term > Term Condition > Tested Field
- Related Knowledge Base Articles:
 - [Creating Template Sections](#)
 - [Creating Quote Term Template Content](#)
 - [Multiple Quote Term Sections](#)
 - [Building Quote Term Conditions](#)
 - [Creating Standard Terms](#)
 - [Lock Quote Term from Edits](#)

Quote Template Debugging

Template Troubleshooting Process

When receiving an error message that the PDF has failed to render.

- 1) Clone the original Quote Template record
- 2) Delete first section
- 3) Attempt to Preview Document
- 4) Clone the record with the newly deleted section
- 5) Delete another section
- 6) Attempt to Preview Document

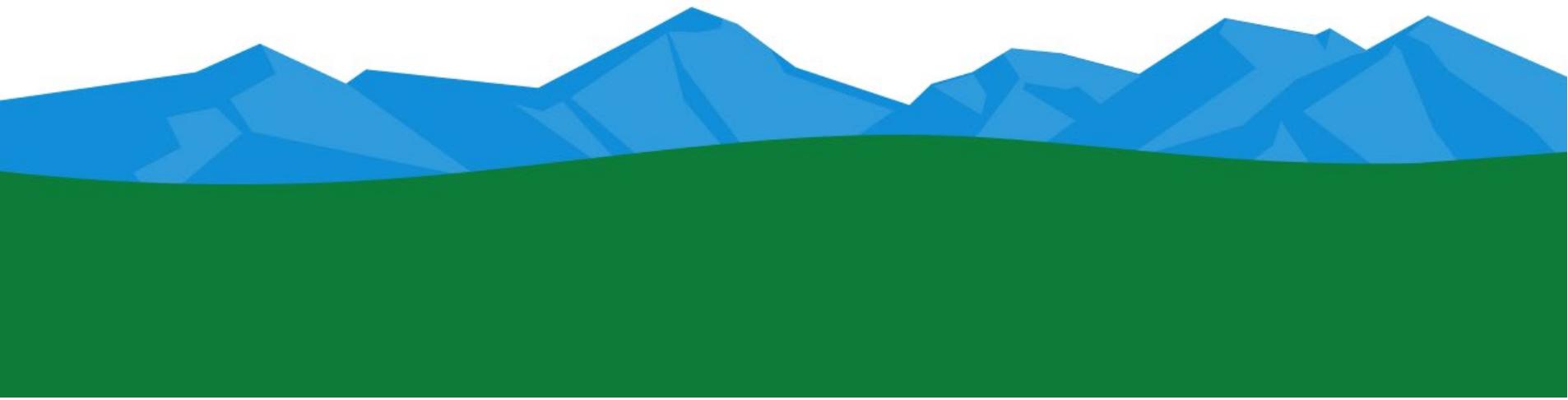
.....continue this process until the document renders, then address the problematic section.



Troubleshooting

Quote Templates

None of my quote terms are appearing. What could be causing this to happen?



Localization

AM

AM

Localization

In Salesforce, you can provide translations or overrides in:

- ✓ Translation Workbench
- ✓ Field names
- ✓ Pick list values
- ✓ Help message

- ✓ Custom Labels
 - ✓ Button names
 - ✓ Messages
 - ✓ Error messages

- ✓ Rename tabs and labels for all tab and object names

All these tools allow you to translate meta-data. But what about translating the data itself?



Localization

Salesforce CPQ provides localization functionality beyond native Salesforce capabilities.

Typical Use cases:

- ✓ Show translated product names and descriptions directly in the UI (product selection, configuration, line editor) or the output document
- ✓ Show translated feature names in bundles
- ✓ Show translated Quote Terms in the output document
- ✓ Show translated Template Content for your quote templates

Localization

Using the Salesforce CPQ Localization object, you can provide translations for:

- ✓ Text, Text area, Long text area, Rich text area fields

On the following objects:

- ✓ Product
- ✓ Product Feature
- ✓ Product Option
- ✓ Price Dimension
- ✓ Quote Template
- ✓ Line Column
- ✓ Quote Term



Languages

The languages supported by Salesforce CPQ are those supported by Salesforce:

Chinese (Simplified)	Japanese
Chinese (Traditional)	Korean
Danish	Norwegian
Dutch	Portuguese (Brazil)
English	Russian
Finnish	Spanish
French	Spanish (Mexico)
German	Swedish
Italian	Thai

Localization

How does it work?

- ✓ Verify Package Setting > Enable Multi-Language Translation is checked
- ✓ Add the “Translate” button in your page layout
- ✓ Click the “Translate” button
- ✓ Salesforce CPQ displays a page with a language pick list, and all the fields that are translatable on the object
- ✓ Select the language from the pick list
- ✓ Enter the translation for the desired fields
- ✓ Click “Save”

You can also mass-upload the data directly into the Localization object.



Localization – Quote Templates

Specific information about Quote Templates:

- ✓ Similar process to store the translated text (Add “Translate” button or mass-load)
- ✓ Quote Templates will default to the user’s specified language.
- ✓ Quote Templates default to the company’s default language if no translation is made.
- ✓ In the Salesforce CPQ package settings, “Allow Output in Different Languages” marked as True (“Documents” tab).
- ✓ If a translation exists for a field in a particular language, that value will be commuted to the document output based on the language selected on the Generate Document page.

Localization – Template Content

Specific information about Template Content (starting in Spring '16)

- ✓ Only Template Content of type HTML can be translated. If you are using Template Top or Template Bottom, we recommend that you convert these into HTML template content records.
- ✓ Each piece of static text in the HTML of the template content can be represented by a “variable” that maps to the translation for a specific language. Example:
- ✓ Title “Proposal” – Click Translate and create a translation variable called “Proposal”:
 - ✓ English: Proposal
 - ✓ French: Offre Commerciale
- ✓ Then, in the template content, replace the “Proposal” static text by:
 {!Text.Proposal}

Localization Demo

Quick demo of localization for:

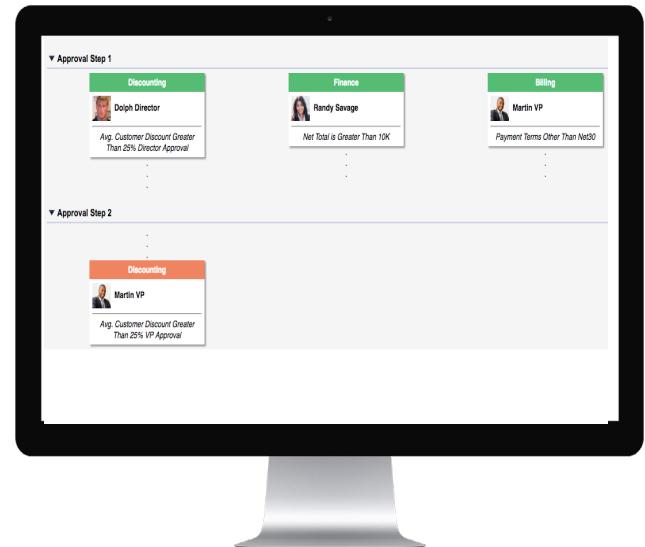
- ✓ Product: product name
- ✓ Template Content (Spring '16 feature): text variables

Advanced Approvals

Advanced Approvals Introduction

Major Advantages:

- Dynamic Approvers – Simplify approval structures by programmatically swapping approvers.
- Approval Chains – Allow for parallel, asynchronous approvals.
- Smart Approvals – Reduce time for approvals when resubmitting by remembering previous approvals.

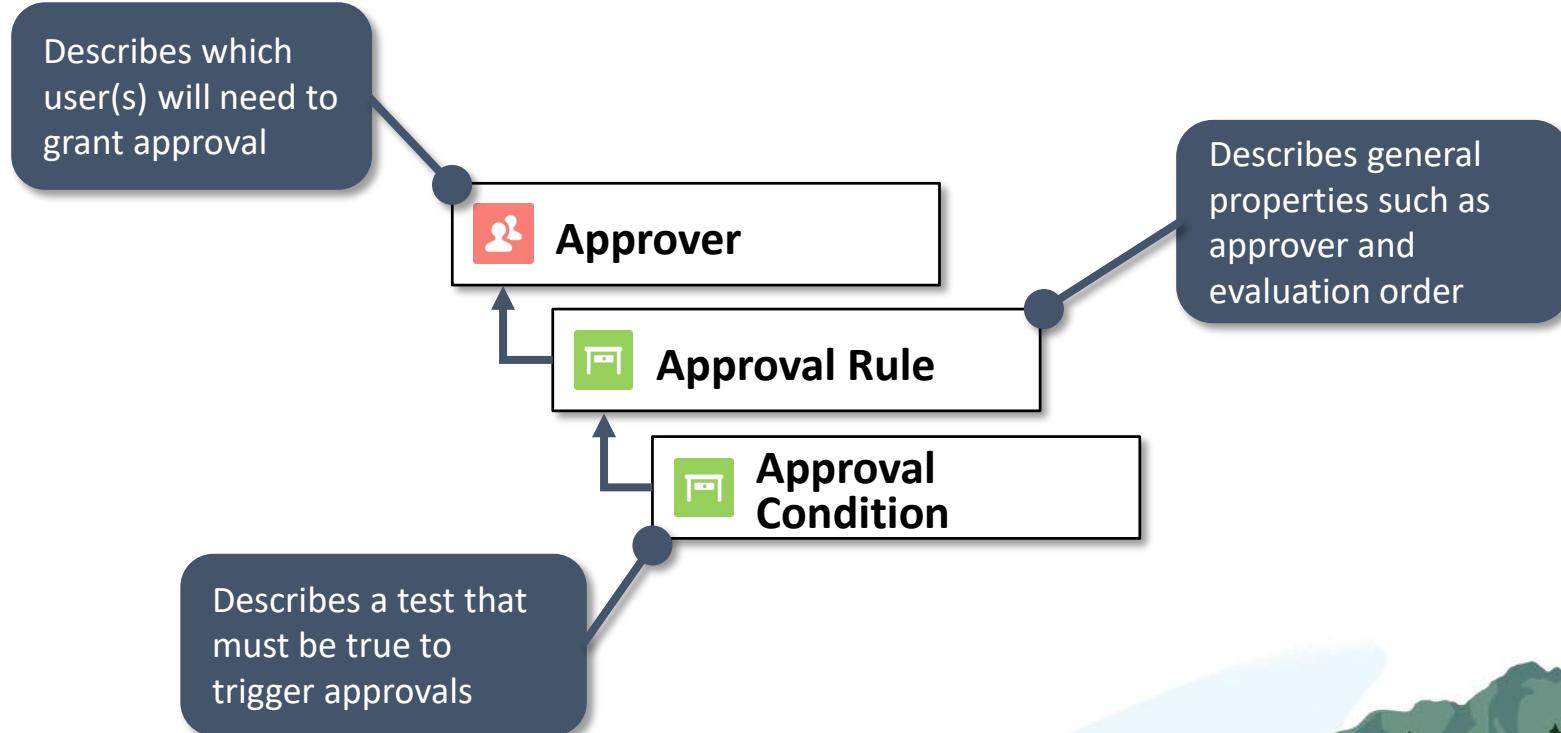


Advanced Approvals Package

- Opportunities may use AA out of the box, but any object may be enabled.
- Enabling is well documented at help.salesforce.com

Uninstall Configure Manage Licenses	 Salesforce CPQ	Salesforce CPQ	214.12.7	SBQQ
Description Salesforce CPQ simplifies configuration and ensures pricing and quoting accuracy across all sales channels.				
Uninstall Configure Manage Licenses	 Advanced Approvals	SteelBrick Advanced Approvals	3.8	sbaa
Description SteelBrick Advanced Approvals takes approval process to the next level by streamlining the review and approval of quotes, contracts, and invoices.				

Basic Approval Configuration



Approval Set Up Demonstration

- Create an Approver
- Create an Approval Rule
- Create an Approval Condition

I need to approve any quote that has **Payment Terms** of anything other than the default of **Net 30**.



Yuko Ishikawa
Sales Operations Director

Field Picklists

Picklists such as Tested Field will start with a few fields to choose from.

You will likely have to add other fields as needed. These may be core field, from other managed packages, or custom fields.

AC-000000

Tested Information

Tested Field: SBQQ__NetAmount__c

Tested Variable: Search Approval Variables...

Amount
Probability
Type
Discount_Percentage__c
SBQQ__PaymentTerms__c
✓ SBQQ__NetAmount__c
SBQQ__AverageCustomerDiscount__c

Filter Field: -None--

Filter Value: 10000

Filter Variable: Search Approval Variables...

Brian Cloutier, 4/18/2018 12:40 PM

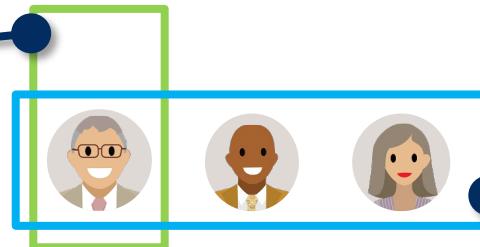
Brian Cloutier, 4/25/2018 9:25 PM

Cancel Save

Approval Groups

Approver records may identify a Public Group by ID instead of an individual User.

By default, only a single member of a group must approve



Setting Unanimous to true requires all approvers to approve



Delegate Approvals

The screenshot shows the 'Approver' record for 'VP of Finance'. The record includes fields for Approver Name (VP of Finance), Owner (Brian Cloutier), User (Brent Bassi), Group ID, Unanimous (checkbox), and Delegation Start/End dates. A red box highlights the 'Delegation Start' and 'Delegated Approver' fields. A blue callout bubble points to the 'Delegated Approver' field with the text: 'The delegated approver must have his or her own Approver record'.

Approver
VP of Finance

RELATED DETAILS

Approver Name
VP of Finance

User Brent Bassi

Next Approver

Owner Brian Cloutier

Group ID

Unanimous

▼ Delegate Information

Delegation Start

Delegated Approver

Delegation End

Delegated User Id

Created By Brian Cloutier, 4/18/2018 12:20 PM

Last Modified By Brian Cloutier, 4/18/2018 12:20 PM

The delegated approver
must have his or her own
Approver record

Approval Notifications Basics

Emails may be sent for different events:

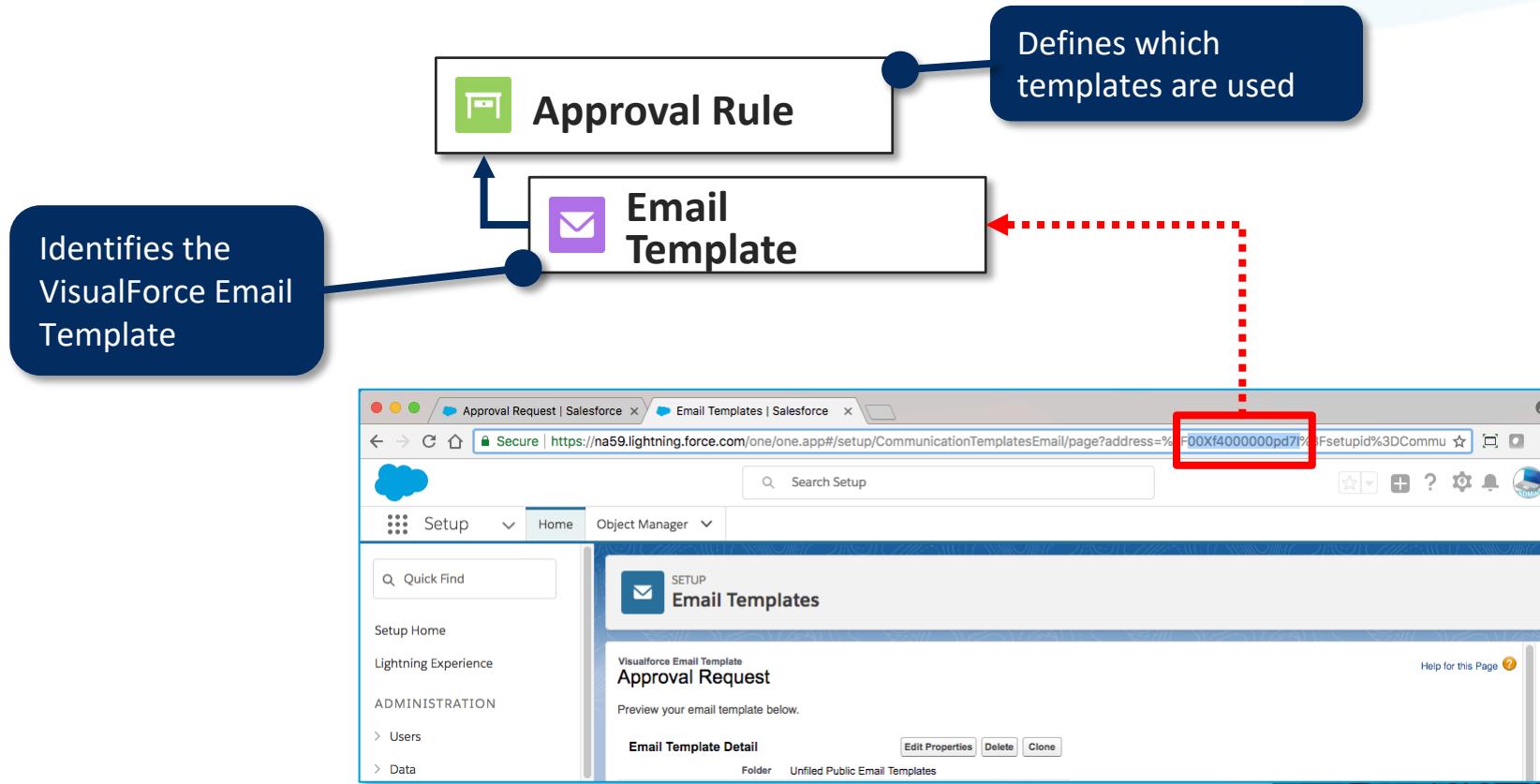
- Approval Requested
- Approval Rejected
- Approval Recalled
- Approvals Complete

VisualForce email templates are used for notifications.

Each Approval Rule may use its own set of templates.

The screenshot shows the 'Email Notifications' section of the Salesforce setup. It includes four search fields for different types of templates: 'Request Template', 'Recall Template', 'Approval Template', and 'Rejection Template'. Each template has a corresponding 'Search Email Templates...' input field and a magnifying glass icon. To the right of these fields are two sections for 'Approval Recipients' and 'Rejection Recipients', each listing three items: 'Record Owner', 'Record Created By', and 'Initial Submitter'. The 'Initial Submitter' item is highlighted with a grey background in both sections.

Email Notifications Data Model



Approval Variables

Approval Variables represent a number based on multiple records.

Quote 00005 Line Items

Quote Line #	Product Code	List Price	Discount %	Discount
QL-0001	LJ-PRINTER	\$280	10	\$140
QL-0002	AP-MBPRO	\$520	5	\$26
QL-0003	LJ-TONER	\$100	50	\$50
QL-0004	MS-OFFICE365	\$100	10	\$10

New Approval Variable

Largest Quote Line Discount = 50

Approval Variable Set Up

New Approval Variable

Information

*Variable Name: Sum Net Total of Hardware Quote Lines

*Type: Summary

Target Object: SBQQ__QuoteLine__c

Filter Field: SBQQ__ProductFamily__c

Aggregate Field: SBQQ__NetTotal__c

Operator: equals

Aggregate Function: Sum

Filter Value: Hardware

Advanced

Combine With: Search Approval Variables...

List Variable: Search Approval Variables...

What are we looking at?

What will we do with found values?

In most cases will be Summary

How do we limit which records contribute?

Approval Variable Extras

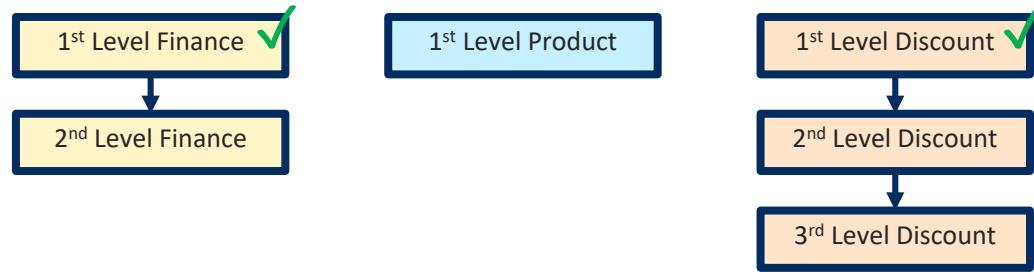
They only work if evaluated records are related to the Approval Rule object through a lookup.

- An Opportunity rule could evaluate Opportunity Products, but not Assets.
- No error message occurs, but conditions using the variable will never be met!

Use the Combine With field to add another Approval Variable to another.

It is very likely you will need to update Target Object, Aggregate Field, and Filter Field picklists.

Require Explicit Approval



Archiving Approvals

- By default, Approval records are deleted upon resubmitting.
- Approvals marked as Archived will be retained.
- Create a formula number field named `ApprovalsArchived__c`. When it returns 1, Approvals are automatically flagged as Archived.

Approve | Reject

Assigned To	Jacob Lerner	Comments
Quote	Q-00000	<input type="checkbox"/> Is Finance Approved
▼ Extras		
Approval Template Id		Recall Template Id
Approver Field		<input type="checkbox"/> Rejected By
Archived	<input type="checkbox"/>	Rejection Template Id
Assigned Group Id		<input type="checkbox"/> Request Template Id
Assigned To Me	<input type="checkbox"/>	<input type="checkbox"/> Require Explicit Approval
Delegated Approver		<input type="checkbox"/> Unanimous
Created By	Brian Cloutier, 4/26/2018 12:27 AM	Last Modified By
		Brian Cloutier, 4/26/2018 12:27 AM

Scalability Concerns – Use Dynamic Approvals

If a given step needs different approvers for different conditions, scalability can be challenging



Dynamic Approvers

Programmatically identify an approver for an Approval Rule by using the Approver Field field.



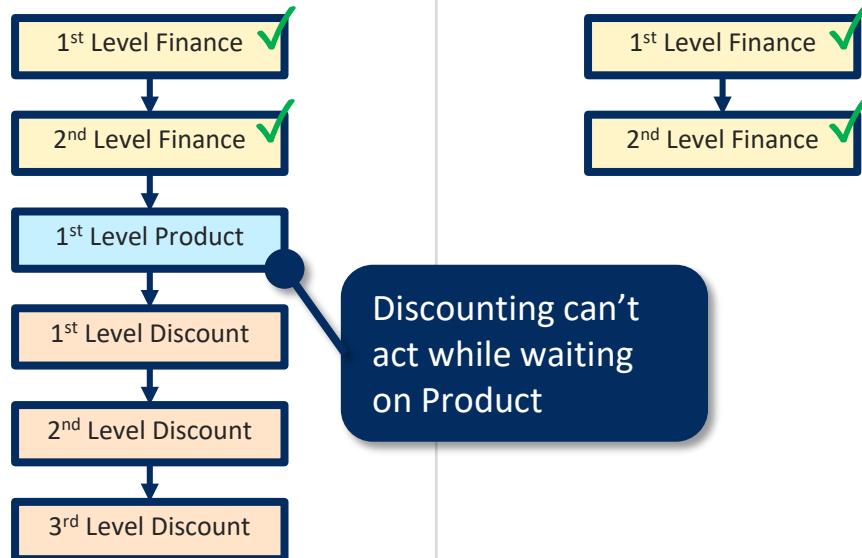
VPApprover__c on Quote

```
CASE(SBQQ_SalesRep_r.Region__c,  
"AMER", "005f4000002BbHP",  
"EMEA", "005f4000002BbHU",  
"APAC", "005f4000002BbHg",  
"LATAM", "005f4000002BbHh",  
"005f4000002BbHA")
```

The screenshot shows the 'Regional VP Approvals' approval rule configuration. The 'Approver Field' dropdown is set to 'VPApprover__c', which is highlighted with a yellow background. Other fields include 'Override Field' (set to 'None'), 'Effective Start Date' (unset), 'Effective End Date' (unset), and 'Owner' (set to Brian Cloutier). The status dropdown shows 'Pending' as the selected option. The bottom right of the screen features the standard Salesforce 'Cancel' and 'Save' buttons.

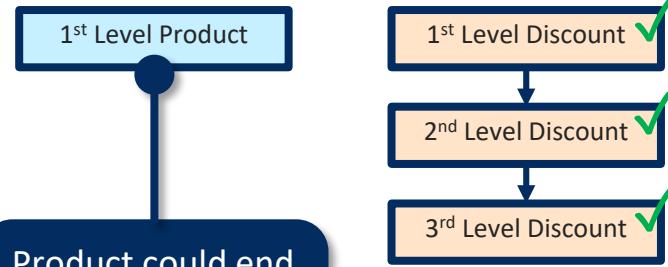
Approval Chains

Standard Approvals



Discounting can't act while waiting on Product

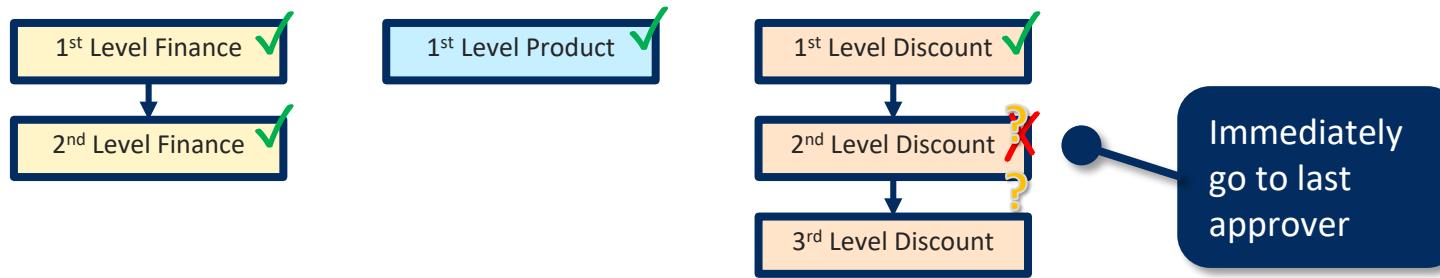
Advanced Approvals



Product could end up being the last approval

Smart Approval Basics

Smart Approvals expedites re-submitted quotes after fixes by remembering what was previously approved.



Enabling Smart Approvals

Individual Approval Conditions may be configured to use Smart Approvals.

A mix of normal and Smart Approvals is possible.

The screenshot shows the 'Approval Condition' page for record AC-000001. The 'DETAILS' tab is selected. On the right side, there is a section titled 'Approval Rule' with the rule description 'Avg. customer discount is 10% or greater'. Below this is a checkbox labeled 'Enable Smart Approval' which is currently unchecked. This checkbox is highlighted with a red rectangular border. The page also contains sections for 'Tested Information' (Tested Field: SBQQ__AverageCustomerDiscount__c) and 'Filtered Information' (Operator: greater or equals, Filter Type: Value). At the bottom, it shows 'Created By' Brian Cloutier and 'Last Modified By' Brian Cloutier.

Approval Condition
AC-000001

RELATED DETAILS

Condition Name: AC-000001

Index:

Approval Rule: Avg. customer discount is 10% or greater

Enable Smart Approval:

Tested Information

Tested Field: SBQQ__AverageCustomerDiscount__c

Tested Variable:

Filtered Information

Operator: greater or equals

Filter Field:

Filter Type:

Value:

Filter Value: 10

Filter Variable:

Created By: Brian Cloutier, 4/18/2018 12:55 PM

Last Modified By: Brian Cloutier, 4/25/2018 9:06 PM

Approval Snapshots

When an approval based on a Smart Approval gets approved, an Approval Snapshot is created, related to the Approval in question.

The screenshot shows the Approval interface with the title "Approval Approve | Reject". It displays the following details:

- Status: Approved
- Approval #: A-00271
- Assigned To: Kathy Cooper
- Approval Chain: Discounting

Below this, there are two tabs: "RELATED" and "DETAILS". The "RELATED" tab is selected, showing a list titled "Approval Snapshots (1)". The snapshot listed is:

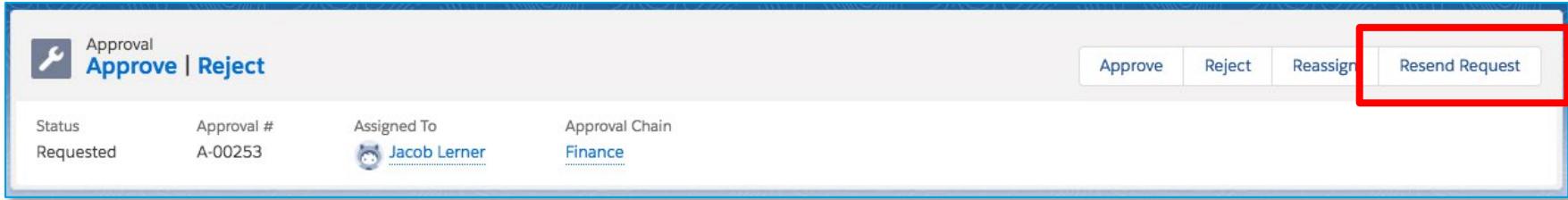
APPROVAL SNAPSHOT #	APPROVAL CONDITION	APPROVED VALUE (DATE)	APPROVED VALUE (NUME...
AS-00048	AC-000001	17.80	(dropdown menu)

At the bottom of the "RELATED" section, there is a "View All" link.

A blue callout bubble points to the "APPROVED VALUE" column with the text: "Any resubmitted value that's ‘better’ will be auto-approved". Another blue callout bubble at the bottom left states: "Resubmitting generates new Approvals and new Snapshots, but snapshot retains originally approved value".

Resubmitting generates new Approvals and new Snapshots, but snapshot retains originally approved value

Resend Request



The screenshot shows the Approval interface for a record. At the top left is a wrench icon labeled "Approval". Below it are buttons for "Approve" and "Reject". To the right of these are buttons for "Reassign" and "Resend Request", with the "Resend Request" button highlighted by a red rectangular box. The main content area displays the following information:

Status	Approval #	Assigned To	Approval Chain
Requested	A-00253	Jacob Lerner	Finance

Sales Reps can resend notification for an outstanding approval.

Resend Request also lives on the record of the object being approved. This allows sales reps to resend in bulk, and allows for commenting.

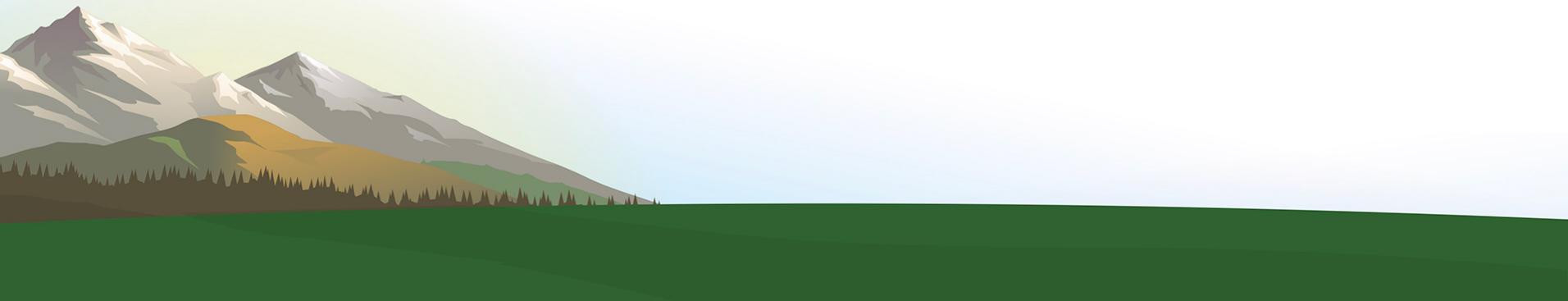
Reassigning Approvers



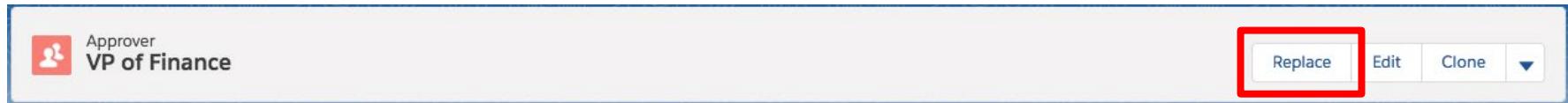
A screenshot of the Salesforce Approval interface. At the top left is a wrench icon labeled "Approval". Below it are buttons for "Approve" and "Reject". To the right are buttons for "Reassign" and "Resend Request". The main area shows the following details:

Status	Approval #	Assigned To	Approval Chain
Requested	A-00253	Jacob Lerner	Finance

- The reassign button on the Approval lets the Approver choose another user to act on the Approval.
- Doing so sends a notification to the selected user.



Replace Approvers



The Replace button performs two major tasks:

- Updates every Approval Rule to use the selected Approver.
- Updates every requested Approval that was originally assigned to the old Approver.

Approval Rule Effective Dates

Make an Approval Rule only evaluate after a specific date.

The screenshot shows the configuration screen for an Approval Rule named "Net Total is \$10,000 or greater". A callout bubble points to the "Effective Date Field" dropdown, which is set to "SBQQ__StartDate__c".

Net Total is \$10,000 or greater

Exclusions

Effective Date Field: SBQQ__StartDate__c

Excluded Statuses: Pending, Approved, Rejected, Recalled

Effective Start Date: 5/1/2018

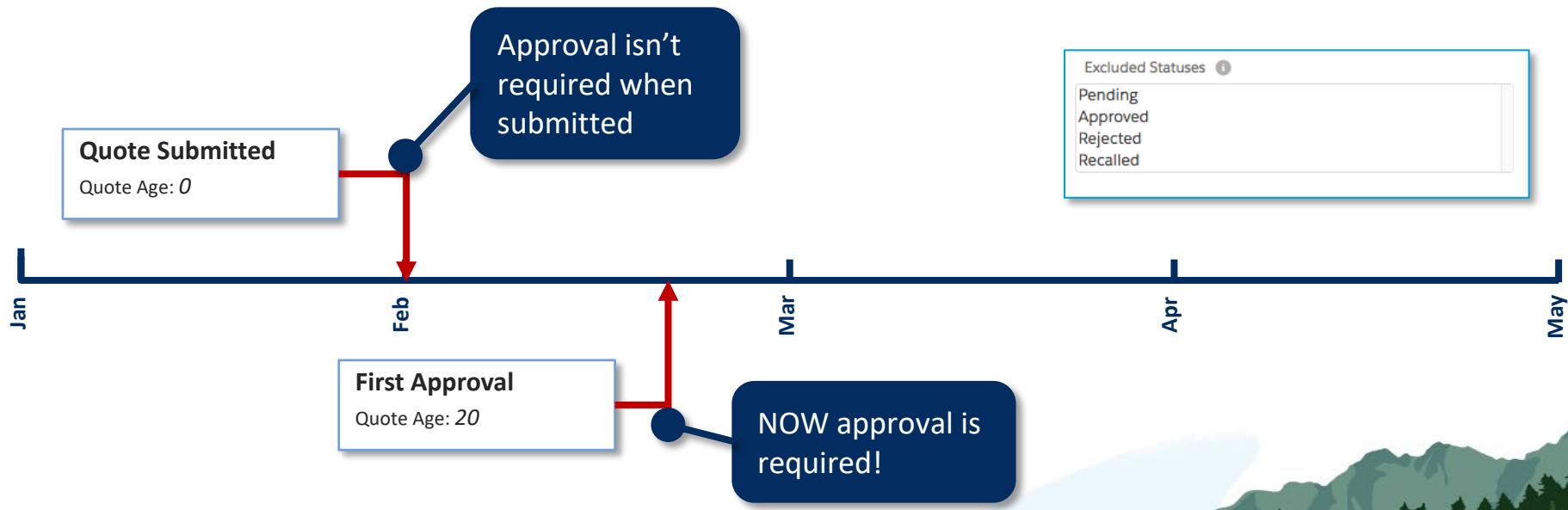
Effective End Date:

Use any field from
the object being
approved

Evaluating Approval Rules and Excluded Status

Approval Rules are evaluated every time an approval occurs.

Scenario: Approval is required if a quote is older than 14 days.



Consolidating Approval Emails

By default, if a single individual needs to approve for multiple reasons, they will receive multiple emails.

Salesforce CPQ Advanced Approvals Settings

Save Cancel

Approval Settings Deal Desk Settings Additional Settings

Approved Keywords: Approved,Approve,Yes

Rejected Keywords: Rejected,Reject,Decline, No

Consolidate Approval Emails

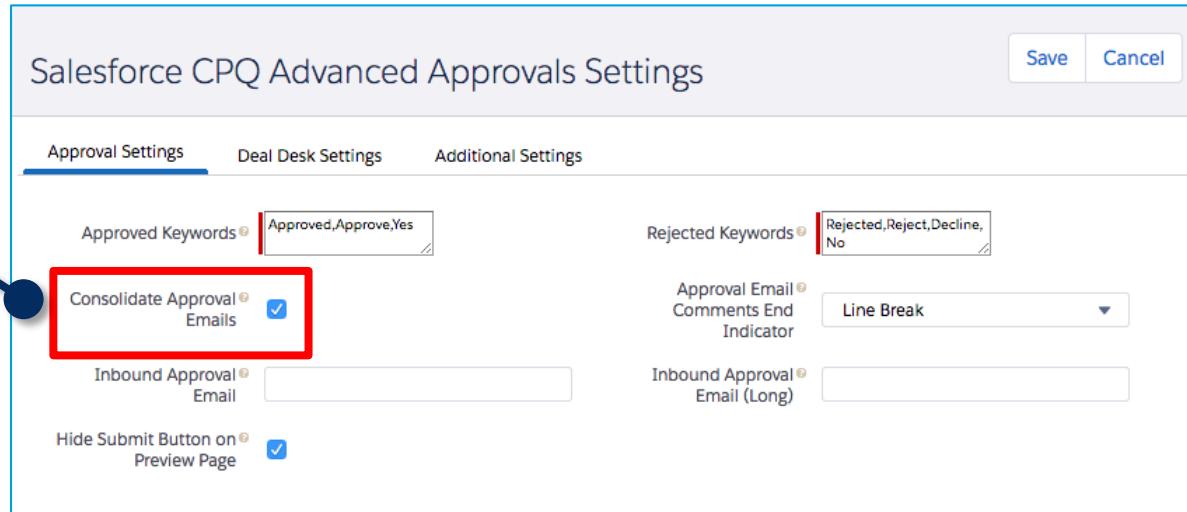
Inbound Approval Email:

Approval Email Comments End Indicator: Line Break

Inbound Approval Email (Long):

Hide Submit Button on Preview Page

Only one email will be sent when true



NOTE:

If two different templates are used, the first created Approval determines which is sent

Email Responses and Keywords

Allow approvers to respond to emails with keywords.

Salesforce CPQ Advanced Approvals Settings

Save Cancel

Approval Settings Deal Desk Settings Additional Settings

Approved Keywords

Rejected Keywords

Consolidate Approval Emails

Inbound Approval Email

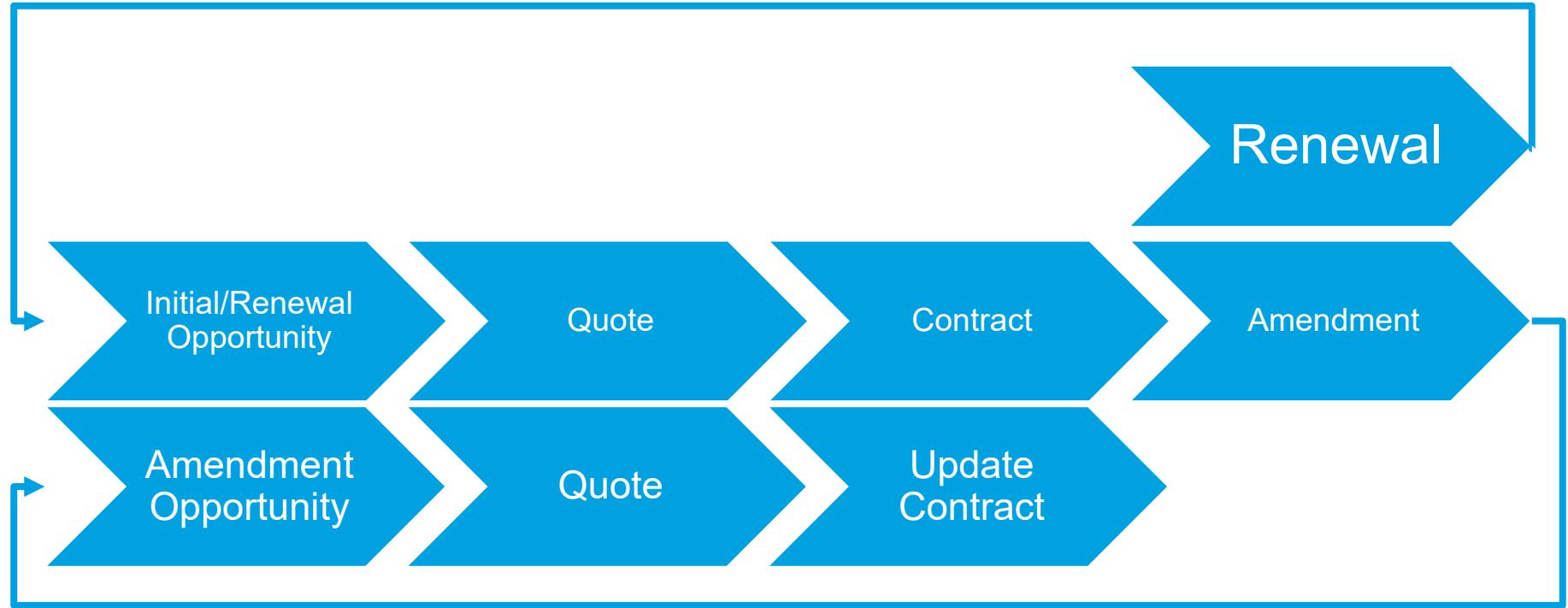
Hide Submit Button on Preview Page

Approval Email Comments End Indicator

Inbound Approval Email (Long)

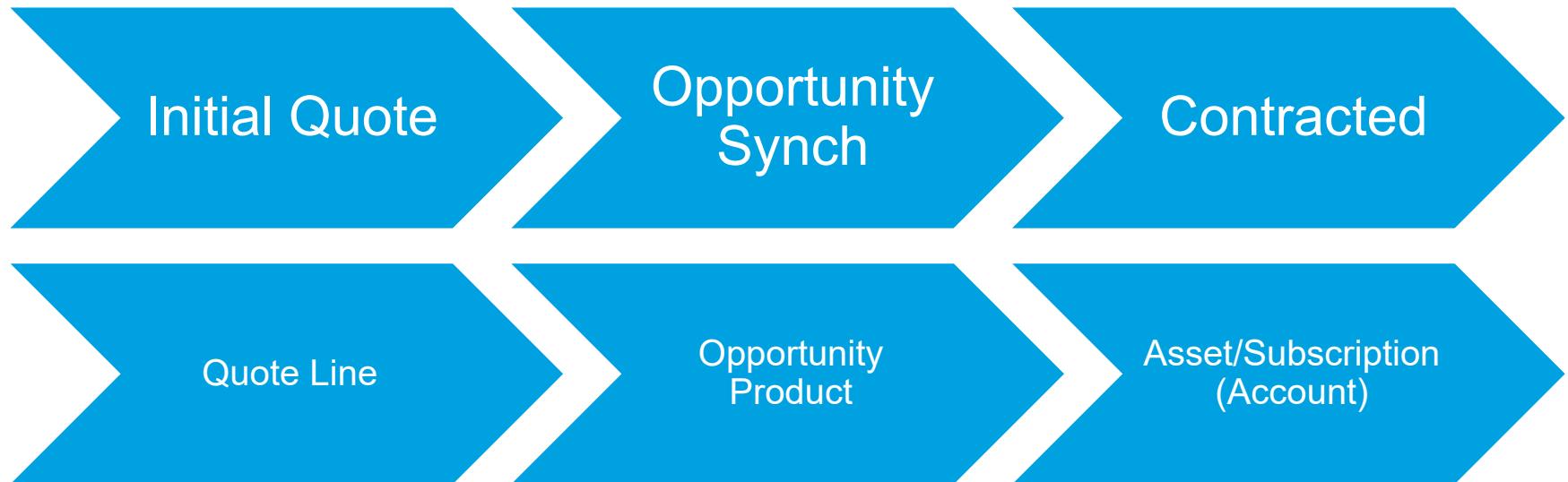
Type a keyword
into the first line
of the response,
the second line
will go into
comments

Contracts and Renewals



Data Flow

Simplified



Auto-Mapping Concerns

Contracting End-to-End



Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

- Generates a new opportunity for renewal

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

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- Generates a new opportunity for renewal

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

Opportunity Information | = Required Information

Opportunity Owner	Brian Cloutier	Amount	<input type="text"/>
Private	<input type="checkbox"/>	Close Date	<input type="text" value="1/31/2016"/> [<u>1/18/2016</u>]
Opportunity Name	<input type="text" value="Second Big Sale"/>	Next Step	<input type="text"/>
Account Name	Bluth Company 	Stage	<input type="text" value="Proposal/Price Quote"/> 
Type	--None-- 	Probability (%)	<input type="text" value="75"/>
Lead Source	--None-- 	Primary Campaign Source	<input type="text"/> 

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

Information ■ = Required Information

<input checked="" type="checkbox"/> Primary	Opportunity <input type="text" value="Second Big Sale"/>
Status <input type="text" value="Draft"/>	Type <input type="text" value="Quote"/>
Expires On <input type="text" value="2/17/2016"/> [1/18/2016]	Payment Terms <input type="text" value="Net 30"/>
Sales Rep <input type="text"/>	Start Date <input type="text" value="2/1/2016"/> [1/18/2016]
Primary Contact <input type="text"/>	
Subscription Term <input type="text" value="36"/>	
Delivery Method <input type="text" value="--None--"/>	
Master Contract <input type="text"/>	

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

Product Selection

4 Products Found

<input type="checkbox"/> PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION
<input checked="" type="checkbox"/> ADMINHOUR	Admin Hour	Support	
<input type="checkbox"/> AP-MAGICMOUSE	Apple Magic Mouse	Hardware	
<input checked="" type="checkbox"/> CLOUDSTORAGE	Cloud Storage 1GB	Software	

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

- Generates a new opportunity for renewal

Create a Contract and Renewal Opportunity

Implementation Process Overview

Update Opportunity

Opportunity Detail

Save Cancel

Opportunity Owner	Brian Cloutier [Change]	Amount	\$2,760.00
Private	<input type="checkbox"/>	Expected Revenue	\$2,070.00
Opportunity Name	Second Big Sale	Close Date	1/31/2016
Account Name	Bluth Company	Next Step	Stage Closed Won
Type		Probability (%)	100
Lead Source		Primary Campaign Source	
Created By	Brian Cloutier, 1/18/2016 9:04 AM	Last Modified By	Brian Cloutier, 1/18/2016 9:25 AM
Description			
Custom Links	Delivery Status		

▼ SteelBrick Information

Primary Quote Q-00001

Contracted

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

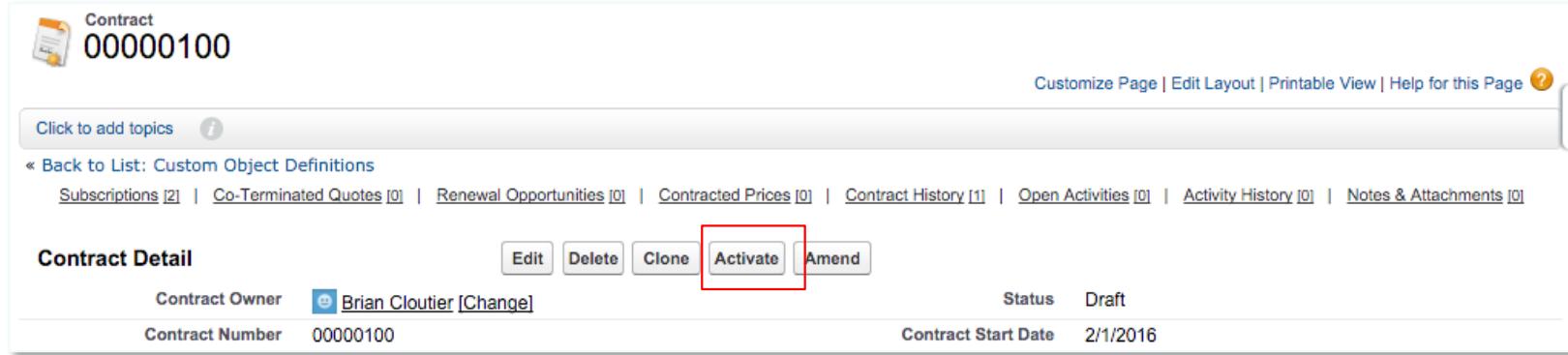
Update Contract

- Generates a new opportunity for renewal

Create a Contract and Renewal Opportunity

Implementation Process Overview

Activate Contract



The screenshot shows the Contract Detail page for a record with ID 00000100. The top navigation bar includes links for Customise Page, Edit Layout, Printable View, and Help for this Page. Below the header, there's a section for Click to add topics. The main content area has a back link to the Custom Object Definitions list. A horizontal menu bar contains buttons for Edit, Delete, Clone, **Activate** (which is highlighted with a red box), and Amend. The Contract Detail section displays the following information:

Contract Owner	Brian Cloutier [Change]	Status	Draft
Contract Number	00000100	Contract Start Date	2/1/2016

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

- Generates a new opportunity for renewal

Create a Contract and Renewal Opportunity

Implementation Process Overview

Update Contract

▼ SteelBrick Information

Renewal Forecast   	Renewal Quoted  
Renewal Opportunity Stage  Proposal/Price Quote 	Renewal Opportunity 
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Subscriptions [New Subscription](#) [Subscriptions Help](#) 

Action	Subscription #	Product	Start Date	End Date	Renewed Date	Terminated Date
Edit Del	SUB-0000000	Admin Hour	2/1/2016	1/31/2019		
Edit Del	SUB-00000001	Cloud Storage 1GB	2/1/2016	1/31/2019		

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

Contract
00000100

Customize Page | Edit Layout | Printable View | Help for this Page ?

Click to add topics ⓘ

[Subscriptions \[2\]](#) | [Co-Terminated Quotes \[0\]](#) | [Renewal Opportunities \[1\]](#) | [Contracted Prices \[0\]](#) | [Contract History \[3\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Contract Detail		Edit	Delete	Clone	Amend
Contract Owner	Brian Cloutier [Change]				Status Activated
Contract Number	00000100				Contract Start Date 2/1/2016
Account Name	Bluth Company				Contract End Date 1/31/2019
Customer Signed By					Contract Term (months) 36
Customer Signed Title					Owner Expiration Notice
Customer Signed Date					Company Signed By

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Update Quote

Quote Information

<input type="text" value="Start Date ?"/> 8/1/2016	<input type="text" value="Subscription Term ?"/>	<input type="text" value="Target Customer Amount ?"/>								
<input type="checkbox"/> #	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	ADMINHOUR	Admin Hour	10.00	\$75.00	\$2,250.00				\$2,250.00	\$20,250.00
2	CLOUDSTORAGE	Cloud Storage 1GB	1.00	\$20.00	\$50.00				\$50.00	\$0.00
										SUBTOTAL: \$20,250.00

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Update Opportunity

Opportunity Detail		Save	Cancel
Opportunity Owner	Brian Cloutier [Change]	Amount	\$20,250.00
Private	<input type="checkbox"/>	Expected Revenue	\$2,025.00
Opportunity Name	Amendment for contract #00000100	Close Date	1/18/2016
Account Name	Bluth Company	Next Step	
Type		Stage	Closed Won 
Lead Source		Probability (%)	100 
Created By	Brian Cloutier, 1/18/2016 10:14 AM	Primary Campaign Source	
Description		Last Modified By	Brian Cloutier, 1/18/2016 10:19 AM
Custom Links	Delivery Status		
▼ SteelBrick Information			
Primary Quote	 Q-00003	Contracted	 

Create a Renewal Quote

Implementation Process Overview

Update Contract

- Marks contract as Renewal Quoted, generating a quote

Create a Renewal Quote

Update Contract

▼ SteelBrick Information

Renewal Forecast

Renewal Opportunity Stage Proposal/Price Quote

Renewal Quoted

Renewal Opportunity [Renewal Opportunity](#)

[Save](#) [Cancel](#)

Subscriptions		New Subscription		Subscriptions Help		
Action	Subscription #	Product	Start Date	End Date	Renewed Date	Terminated Date
Edit Del	SUB-0000000	Admin Hour	2/1/2016	1/31/2019		
Edit Del	SUB-0000001	Cloud Storage 1GB	2/1/2016	1/31/2019		
Edit Del	SUB-0000002	Admin Hour	8/1/2016	1/31/2019		

Additional Contracting Information

Contracting an Opportunity that has only non-subscription products creates asset records

Opportunity Detail	
Opportunity Owner	<input type="button" value="Save"/> Brian Cloutier [Change] <input type="button" value="Cancel"/>
Private	<input type="checkbox"/>
Opportunity Name	Second Big Sale
Account Name	Bluth Company
Type	
Lead Source	
Created By	Brian Cloutier, 1/18/2016 9:04 AM
Description	
Custom Links	Delivery Status
SteelBrick Information	
Primary Quote	Q-00001
Contracted	<input checked="" type="checkbox"/>

Additional Contracting Information

Contracting an Opportunity that has only non-subscription products creates asset records

Assets						New Asset
Action	Asset Name	Install Date	Quantity	Contact Name	Status	
Edit Del	WiFi Access Point		1.00			
Edit Del	WiFi Router		10.00			

Additional Contracting Information

Asset Conversion

Product Detail

Edit	Delete	Clone	Clone with Related
Product Name	WiFi Router	Active	<input checked="" type="checkbox"/>
Product Code	WIFIROUTER	Asset Conversion  One per quote line	

Assets

Action	Asset Name	Install Date	Quantity	Contact Name	Status
Edit Del	WiFi Access Point		1.00		
Edit Del	WiFi Router		10.00		

Additional Contracting Information

Asset Conversion

Product Detail

Product Name	WiFi Router	Edit	Delete	Clone	Clone with Related
Product Code	WIFIROUTER	Active <input checked="" type="checkbox"/>			
Asset Conversion  One per unit					

Assets

[New Asset](#)

Action	Asset Name	Install Date	Quantity	Contact Name	Status
Edit Del	WiFi Access Point		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		
Edit Del	WiFi Router		1.00		

CPQ Platform

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Key Concepts

CPQ Platform > Contracting

- Understand the Contracting operating process
 - What creates a Subscription vs Asset record
 - Best practice:
 - Generate Renewal Opportunity after contracted
 - Generate Renewal Quote start date one day after the contract end date
 - Importance of preserving bundle structure for renewals
- Related Knowledge Base Articles:
 - [Contracting Overview](#)
 - [Asset Amendments](#)
 - [Renewal Overview](#)
 - [Preserve Bundle Structure on Renewals](#)

Key Concepts

CPQ Platform > Automapping

- Typical automapping use case
 - Product > Quote Line
 - custom Asset and Subscription fields for Renewals
- Understand the Configuration Attribute assembly process
 - Must create twin field on Subscription/Assets in order to reconfigure on renewal quotes
- Related Knowledge Base Articles:
 - [Auto-Mapping Twin Fields](#)



Key Concepts

CPQ Platform > Debugging

- Common reasons why
 - Quote Lines don't write back to the Opportunity
 - No Pricebook Entry on the Products
 - "Exclude from Opportunity" is marked on the Product record
 - \$0 products don't transfer
 - Product Options don't appear
 - No Pricebook Entry on the Products
 - Contract is not generated
 - Primary quote, Start Date or no subscription product present on the quote
- All Else: Check the Active checkbox!
 - ie. Quote Process, Quote Terms, Products, etc
- Related Knowledge Base Articles:
 - [Opportunity Product Troubleshooting](#)
 - [Adding Options](#)
 - [Contracts Overview](#)

Key Concepts

CPQ Platform > Miscellaneous

- Localization
 - Package supports all Salesforce Fully Supported Languages
- Understand how to adding fields to the Quote Line Editor
 - Setup > Create > Objects > Quote and Quote Lines > Field Sets and Page Layouts
- Related Knowledge Base Articles:
 - [Localization with SteelBrick Translation Overview](#)
 - [Quote Line Editor Overview](#)



thank you

Family Reunion

