

## Get Started: Sign up for Trailhead Playground with Salesforce CPQ

To complete the exercises in this guide, you need a special Developer Edition org that contains Salesforce CPQ and our sample data.

Even if you've recently signed up for a special CPQ-enabled Developer Edition org, sign up for new one now. Also note that the Salesforce CPQ managed package expires after 90 days, so you may need a new org anyway.

1. Sign up for a free [Developer Edition org with Salesforce CPQ](#).
2. Fill out the form. For Email, enter an active email address. For Username, enter a username that looks like an email address and is unique, but it doesn't need to be a valid email account (for example, `yourname@cpq4ever.com`).
3. After you fill out the form, click **Sign me up**. A confirmation message appears.
4. When you receive the activation email (this might take a few minutes), open it and click **Verify Account**.
5. Complete your registration by setting your password and challenge question. Tip: Write down your username, password, and login URL for easy access later
6. You are logged in to your Developer Edition.

## EX1: Update Package Settings

Objective: Enable the calculation service introduced in Winter '16 so advanced features are available throughout further exercises.

1. Navigate to Setup | Installed Packages
2. Click Configure

The screenshot shows the 'Installed Packages' page in the Salesforce setup. A single package is listed:

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits
<a href="#">Uninstall</a>   <a href="#">Configure</a>   <a href="#">Manage Licenses</a>	Salesforce CPQ	Salesforce CPQ Dev	208.1	SBQQ	Trial	99000000	1	10/4/2017	7/6/2017 1:32 PM	

A red box highlights the 'Configure' link in the 'Action' column.

3. Uncheck Use Legacy Calculator

The screenshot shows the 'Settings Editor' for the 'Salesforce CPQ' package, specifically the 'Pricing and Calculation' tab. Several configuration options are listed:

Setting	Value	Description
Currency Symbol	[Input Field]	Use Inactive Prices
Unit Price Scale	2	Calculate Immediately
Enable Quick Calculate	<input type="checkbox"/>	Disable Background Calculation Refresh
Allow Non-Consecutive Custom Segments	<input type="checkbox"/>	Enable Usage Based Pricing
Enable Pricing Guidance	<input type="checkbox"/>	Hide uncalculated quote warning
Use Legacy Calculator	<input checked="" type="checkbox"/>	Run Calculator In Background

A red box highlights the 'Use Legacy Calculator' checkbox, which is currently checked.

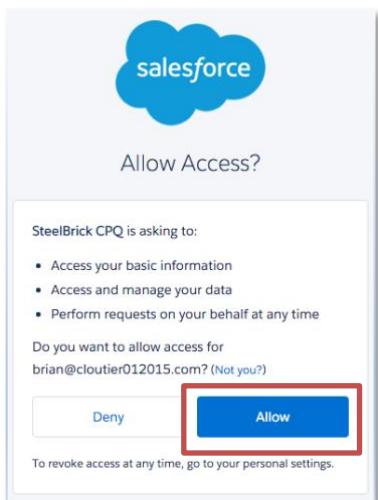
4. Click Authorize new calculation service

The screenshot shows the same 'Settings Editor' and 'Pricing and Calculation' tab as the previous screenshot. However, there is a prominent orange warning message at the top:

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

The configuration options are identical to the previous screenshot, but the 'Use Legacy Calculator' checkbox is now unselected. A red box highlights the 'Authorize new calculation service' button at the bottom of the page.

5. Click Allow



## EX2: Create Sample CPQ Quote

Objective: Create a Salesforce CPQ quote to experience the typical process a sales rep might complete, as well as create a quote record that may be used for further testing.

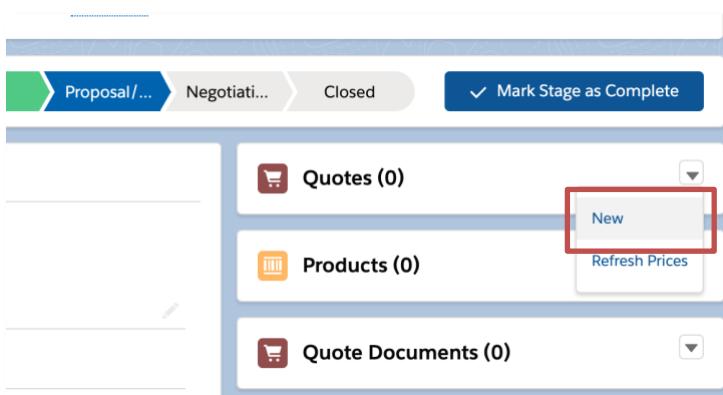
1. Navigate to Accounts tab, change List View to All Accounts
2. Select Burlington Textiles Corp of America
3. Click New Opportunity
4. Set field values, then Save

New Opportunity

Opportunity Information

Opportunity Owner Eric Chen	Amount <input type="text"/>
Private <input type="checkbox"/>	* Close Date 1/31/2020 <input type="button" value="Calendar"/>
* Opportunity Name First Big Sale	Next Step <input type="text"/>
Account Name Burlington Textiles Corp of America <input type="button" value="X"/>	* Stage Proposal/Price Quote

5. Navigate to the newly created Opportunity
6. Click New Quote



7. Set field values, then Save

New Quote

**Information**

Quote Number	Opportunity
Primary <input checked="" type="checkbox"/>	First Big Sale
Type	Primary Contact
Quote	Search Contacts...
Status	Sales Rep
Draft	Search People...
Expires On	Owner
2/22/2020	Eric Chen

**Contract Information**

Start Date	Contracting Method
2/1/2020	By Subscription End Date
End Date	Generate Contracted Price
	--None--
Subscription Term	Ordered
12	<input type="checkbox"/>

8. Click Edit Lines action on newly created Quote

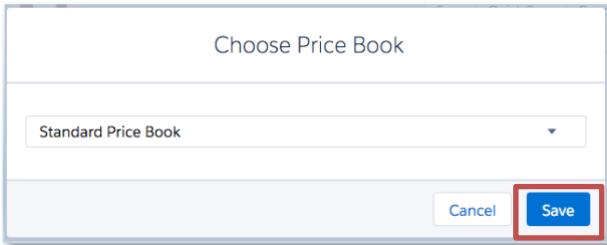
Quote  
Q-00106

Edit **Edit Lines** Preview Document

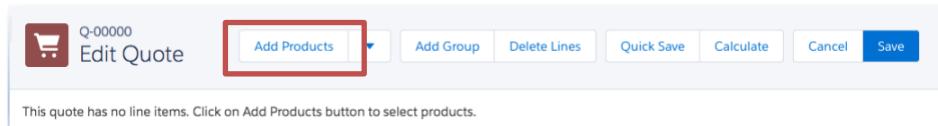
Details Related

Related List Quick  
 Quote Lines (4)  
 Quote Documents

9. Click Save to Choose Price Book popup



10. Click Add Products



11. Choose the following products, then click Select

Product Code
LDWARRANTY
LTEHOTSPOT
PRODUCTIVITYSUITE

12. Enter these quantities, click Calculate to verify subtotal, then click Save

Product Code	Quantity
LDWARRANTY	1
LTEHOTSPOT	3
PRODUCTIVITYSUITE	20

## EX3: Update Product Fields

Objective: Change how specific products behave when added to a Salesforce CPQ quote, mainly in regards to subscription pricing calculations.

1. Navigate to Products | Admin Hour
2. Update field values, then Save

The screenshot shows the 'Salesforce CPQ Pricing' page. The 'Subscription Pricing' section is highlighted with a red box. Inside this box, the 'Subscription Term' field contains the value '1'. Other fields in this section include 'Subscription Pricing' (set to 'Fixed Price') and 'Subscription Term' (set to '1').

3. Update remaining products per table:

Product Code	Sub Pricing	Sub Term	PoT Category	PoT %	Non Discountable
ADMINHOUR	Fixed Price	1			
MONITOR1080P			Hardware		
LASERPRINTER			Hardware		
LDWARRANTY	Percent of Total	12	Hardware	5.0	
PRODUCTIVITYSUITE	Fixed Price	1			True
WARRANTY	Percent of Total	12	Hardware	0.5	
ROUTER			Hardware		

4. Create the following product:

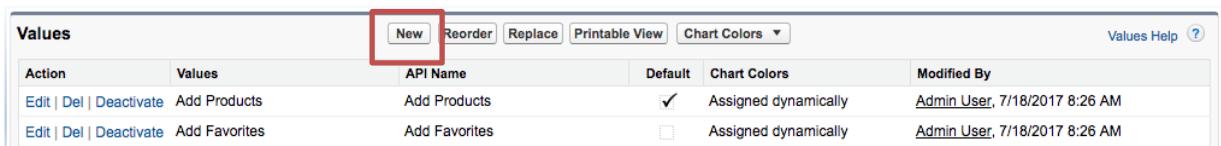
Product Name	Product Code	Active	Non Discountable
IT Professional Pack	ITPROPACK	True	True

5. Navigate to the Price Books Related tab for IT Professional Pack, click Add Standard Price, set List Price to 0

## EX4: Hardware Products Custom Action

Objective: Create a button in the Quote Line Editor that when clicked, will only show products from the Hardware product family in the Product Selection screen, while still being able to filter by Product Family and Product Name.

1. Navigate to Setup | Object Manager | Custom Action
2. Under Fields & Relationships, click the Label field
3. Click New in Values



Values		Action	Values	API Name	Default	Chart Colors	Modified By
<a href="#">Edit</a>	<a href="#">Del</a>	<a href="#">Deactivate</a>	Add Products	Add Products	<input checked="" type="checkbox"/>	Assigned dynamically	<a href="#">Admin User, 7/18/2017 8:26 AM</a>
<a href="#">Edit</a>	<a href="#">Del</a>	<a href="#">Deactivate</a>	Add Favorites	Add Favorites	<input type="checkbox"/>	Assigned dynamically	<a href="#">Admin User, 7/18/2017 8:26 AM</a>

4. Enter Add Hardware, then Save



5. Navigate to Custom Actions tab, then click New

6. Set field values, then Save

New Custom Action

**Information**

* Name Add Hardware	Active <input checked="" type="checkbox"/>
* Display Order 10	Default <input type="checkbox"/>
Type <input type="button" value="i"/> Button	Brand Button <input type="checkbox"/>
Parent Custom Action <input type="button" value="i"/>	URL Target <input type="button" value="i"/> --None--
Search Custom Actions... <input type="button" value=""/>	URL <input type="button" value="i"/>

**Layout**

Page <input type="button" value="i"/> Quote Line Editor	Icon <input type="button" value="i"/> --None--
Location <input type="button" value="i"/> Quote/Group	Label <input type="button" value="i"/> Add Hardware
Action <input type="button" value="i"/> Add Products	Description <input type="button" value="i"/>

7. Under the Related tab, click New in Search Filters

Custom Action  
**Add Hardware**

**Related** Details

**Search Filters (0)**

**Custom Action Conditions (0)**

8. Set field values

New Search Filter

Information

* Filter Name Product Name	* Display Order 10
* Target Object Product	Filter Value
* Target Field Name	Hidden
* Operator contains	Action Add Hardware

9. Click Save & New

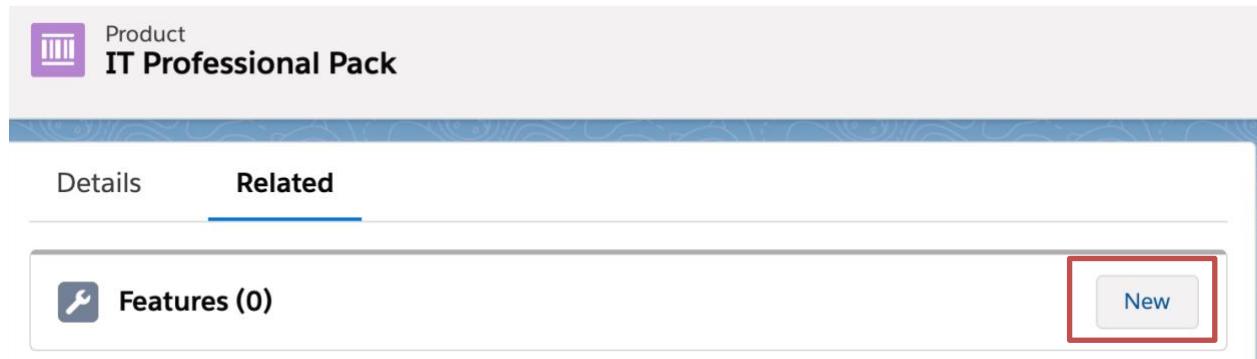
10. Create additional Search Filters with the following values

Filter Name	Target Object	Target Field	Operator	Display Order	Filter Value	Hidden
Product Code	Product	Product Code	starts with	20		
Product Family	Product	Product Family	equals	30	Hardware	True

## EX5: Create Features

Objective: Create Features that will give the ITPROPACK bundle some organization once Product Options are created. The effect of this exercise is only seen after EX6 is complete.

1. Navigate to the ITPROPACK product
2. Click New Product Feature in the Features related list



3. Set field values, then Save

A screenshot of the 'New Product Feature' dialog box. The 'Information' section contains the following fields:

- \* Feature Name: Computers
- \* Min Options: 0
- \* Number: 10
- \* Configured SKU: IT Professional Pack

The 'Feature Name' and 'Number' fields are highlighted with a red border.

4. Create remaining features per table:

Feature Name	Min Options	Number
Computers	0	10
Peripherals	0	20
Printing	0	30
Networking	0	40
Subscriptions	0	50

## EX6: Create Options

Objective: Create a series of Product Options to be presented when the ITPROPACK is configured, defining properties that effect how the sales rep may interact with the options. Also, update the ITPROPACK so that users enter configuration immediately after selecting the product.

1. Navigate to the ITPROPACK product
2. Click New Product Option in the Options related list
3. Set field values, then Save

New Product Option

**Information**

* Optional SKU <span style="color: #800000;">i</span>	Option Name
<input laptop"="" type="text" value="13\"/>	<input type="text" value="IT Professional Pack"/>
* Number <span style="color: #800000;">i</span>	Configured SKU <span style="color: #800000;">i</span>
<input type="text" value="10"/>	<input type="text" value="Computers"/>
Selected <span style="color: #800000;">i</span>	Feature <span style="color: #800000;">i</span>
<input checked="" type="checkbox"/>	<input type="text" value="Related Product"/>
Required <span style="color: #800000;">i</span>	Type <span style="color: #800000;">i</span>
<input type="checkbox"/>	<input type="text" value="--None--"/>
Quantity <span style="color: #800000;">i</span>	Quote Line Visibility <span style="color: #800000;">i</span>
<input type="text" value="1.00"/>	
Quantity Editable <span style="color: #800000;">i</span>	
<input checked="" type="checkbox"/>	

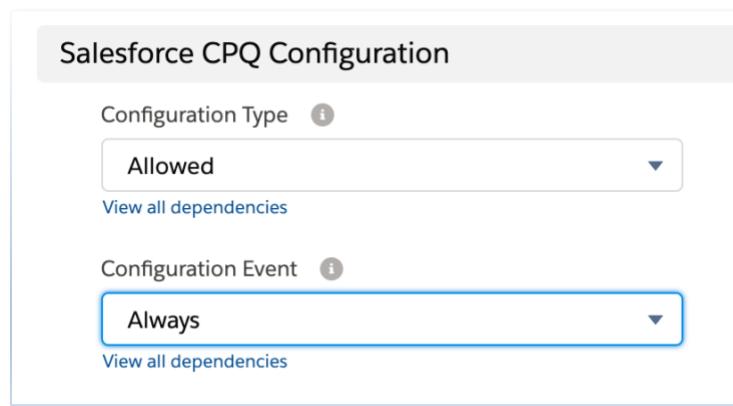
4. Create remaining options per table:

Optional SKU	Feature	Type	Num	Qty	Qty Edit	Select	Min Qty
13" Laptop	Computers	Related Product	10	1	True	True	
15" Laptop	Computers	Related Product	20	1	True		
Keyboard US Layout	Peripherals	Related Product	10	1	True		
Keyboard UK Layout	Peripherals	Related Product	20	1	True		
Mouse	Peripherals	Related Product	30	1	True		
Monitor 1080p	Peripherals	Related Product	40	1	True		
Laser Printer	Printing	Accessory	10	1	True		
Printer Toner Cartridge	Printing	Accessory	20	1	True		
Printer Maintenance Kit	Printing	Accessory	30	1			
Printer Paper Letter	Printing	Related Product	40	1	True		

Optional SKU	Feature	Type	Num	Qty	Qty Edit	Select	Min Qty
Printer Paper A4	Printing	Related Product	50	1	True		
Router	Networking	Accessory	10	1			
WiFi Access Point	Networking	Accessory	20	1			
WiFi Installation	Networking	Accessory	30	1			
Warranty	Subscriptions	Accessory	10	1			
Loss and Damage Warranty	Subscriptions	Accessory	20	1			
Productivity Suite	Subscriptions	Related Product	30	1	True		
Cloud Storage 1GB	Subscriptions	Related Product	40	1	True		
Admin Hour	Subscriptions	Accessory	50	20	True		10

5. Navigate to the ITPROPACK product

6. Set below field values, then Save



## EX7: Create Option Constraints

Objective: Prevent the sales rep from mistakenly selling products such as the WiFi Access Point and WiFi Installation without the requisite WiFi Router. Also, prevent the sales rep from selling more than one type of warranty. All constraints apply only to the ITPROPACK.

1. Navigate to the ITPROPACK product
2. Click New Option Constraint in the Option Constraints related list



3. Set field values, then click Save & New

The screenshot shows the 'New Option Constraint' dialog. The constraint name is 'Installation Option'. The 'Constrained Option' field contains 'PO-000065' and the 'Constraining Option' field contains 'PO-000063'. Both fields are highlighted with red boxes. The 'Router Option' checkbox at the bottom is also highlighted with a red box. Other fields include 'Active' (checked), 'Configured SKU' (IT Professional Pack), and 'Type' (Dependency). The 'Information' section header is visible at the top left.

4. Set field values, then click Save & New

The screenshot shows the 'New Option Constraint' dialog for 'Access Point Option'. The constraint name is 'Access Point Option'. The 'Constrained Option' field contains 'PO-000064' and the 'Constraining Option' field contains 'PO-000063'. Both fields are highlighted with red boxes. The 'Router Option' checkbox at the bottom is also highlighted with a red box. Other fields include 'Active' (checked), 'Configured SKU' (IT Professional Pack), and 'Type' (Dependency). The 'Information' section header is visible at the top left.

5. Set field values, then Save

New Option Constraint

Information

\* Constraint Name **Warranty Option**

Only one warranty may be selected

\* Constrained Option **PO-000066**

\* Constraining Option **PO-000067**

Check Prior Purchases

Active

\* Configured SKU **IT Professional Pack**

\* Type **Exclusion**

Option Constraint Group

**LD Warranty Option**

## EX8: Create Option Constraint with Grouping

Objective: Prevent the sales rep from selling Cloud Storage unless both the WiFi Router AND the WiFi Access Point have been selected. This constraint only applies to the ITPROPACK.

1. Navigate to the ITPROPACK product
2. Click New Option Constraint in the Option Constraints related list
3. Set field values, then click Save & New

New Option Constraint

Information

\*Constraint Name **Cloud Storage Option**  
Cloud Storage requires WiFi Router

\*Constrained Option **PO-000069**

\*Constraining Option **PO-000063**

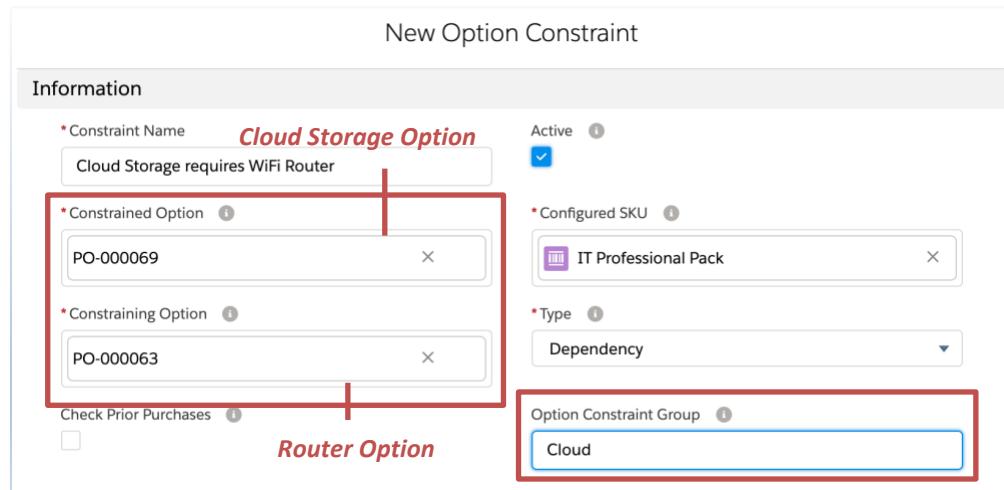
Check Prior Purchases

Active

\*Configured SKU **IT Professional Pack**

Type **Dependency**

Option Constraint Group **Cloud**



4. Set field values, then Save

New Option Constraint

\*Constraint Name **Cloud Storage Option**  
Cloud Storage requires WiFi Access Point

\*Constrained Option **PO-000069**

\*Constraining Option **PO-000064**

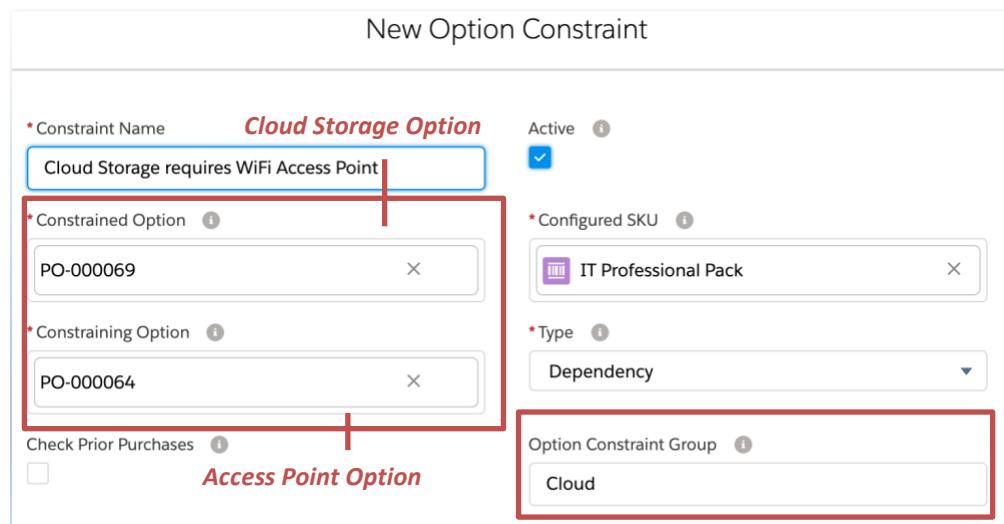
Check Prior Purchases

Active

\*Configured SKU **IT Professional Pack**

Type **Dependency**

Option Constraint Group **Cloud**



## EX9: Printer Options Product Rule

Objective: Automatically check the Printer Toner Cartridge and Printer Maintenance Kit options when the sales rep selects the Laser Printer option, so as to remind the sales rep that those options are frequently sold together when configuring the ITPROPACK.

1. Navigate to Product Rule tab
2. Click New
3. Set Product Rule Name to Setting LASERPRINTER auto-selects PRINTERTONER and PRINTERMAINTKIT, then set field values as shown below, then Save

New Product Rule

Information

* Product Rule Name Setting LASERPRINTER auto-selects PRINTERTONER a	Active <input checked="" type="checkbox"/>
* Type <small>i</small> Selection	* Conditions Met <small>i</small> All
* Scope <small>i</small> Product	Advanced Condition <small>i</small> <input type="text"/>
Evaluation Event <small>i</small> Always	

4. Click New Configuration Rule in Configuration Rule related list
5. Set field values, then Save

New Configuration Rule

Information

Rule #
Active <input checked="" type="checkbox"/>
Product <small>i</small> <input type="text"/> IT Professional Pack <input type="button" value="X"/>
* Product Rule <small>i</small> <input type="text"/> Setting LASERPRINTER auto-selects PRINTERTONER and PRINTERMAINTKIT <input type="button" value="X"/>

6. Click New Error Condition in Error Conditions related list

7. Set field values, then Save

New Error Condition

Information

\* Rule ⓘ  
Setting LASERPRINTER auto-selects PRINTE... X

Tested Object ⓘ  
Product Option

View all dependencies

Tested Field ⓘ  
SBQQ\_\_ProductCode\_\_c

View all dependencies

Tested Attribute ⓘ  
Search Attribute Items...

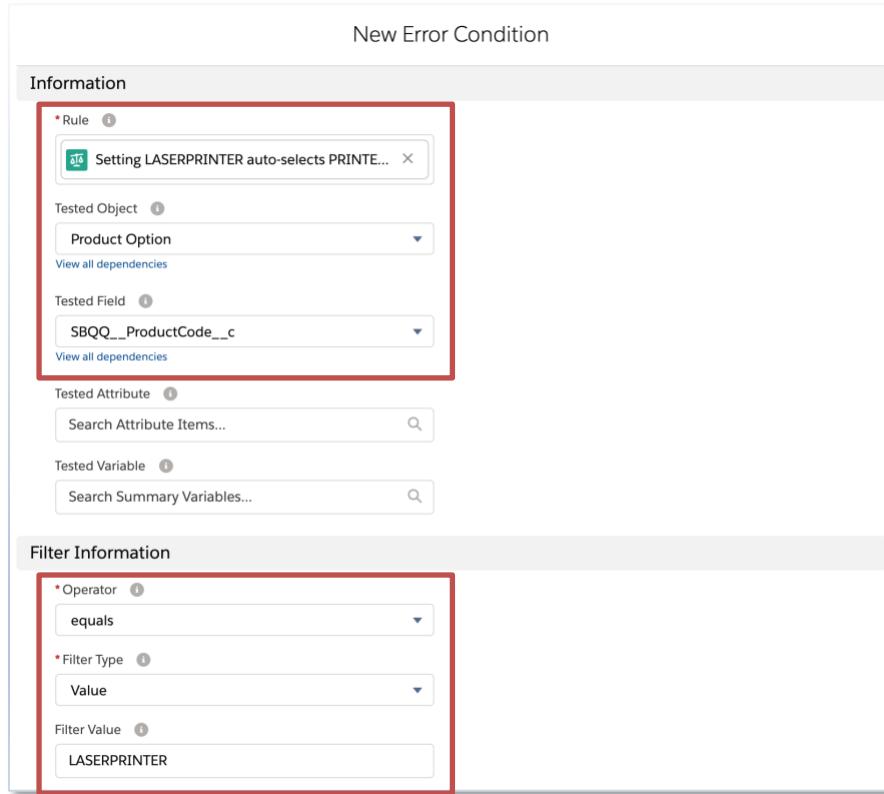
Tested Variable ⓘ  
Search Summary Variables...

Filter Information

\* Operator ⓘ  
equals

\* Filter Type ⓘ  
Value

Filter Value ⓘ  
LASERPRINTER



8. Click New Product Action in Actions

9. Set field values as shown below, then click Save & New

New Product Action

Information

Product Action #

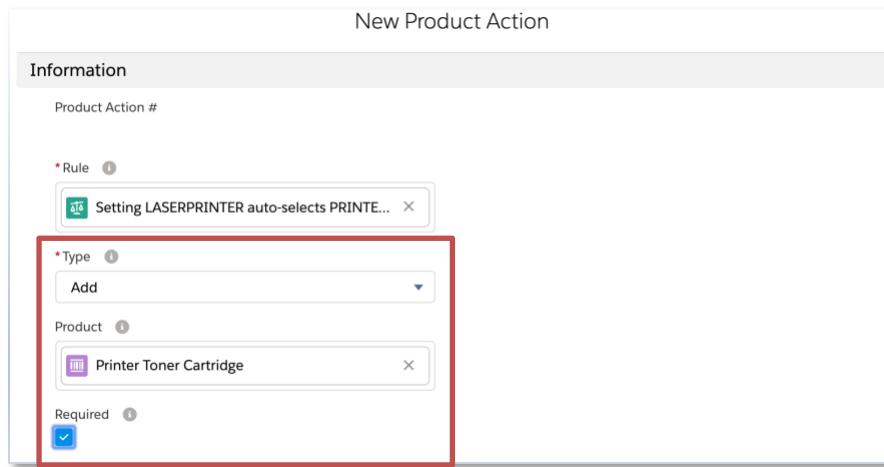
\* Rule ⓘ  
Setting LASERPRINTER auto-selects PRINTE... X

\* Type ⓘ  
Add

Product

Printer Toner Cartridge

Required ⓘ



10. Set field values as shown below, then click Save

New Product Action

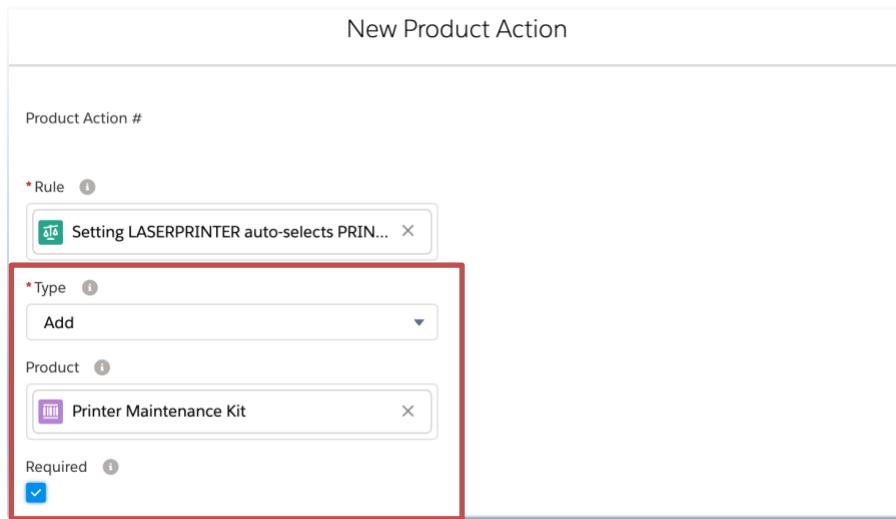
Product Action #

\* Rule ⓘ  
Setting LASERPRINTER auto-selects PRIN... X

\* Type ⓘ  
Add

Product ⓘ  
Printer Maintenance Kit X

Required ⓘ



11. Navigate back to the ITPROPACK

12. Select the LASERPRINTER Product Option

13. Check the Apply Immediately checkbox, then Save

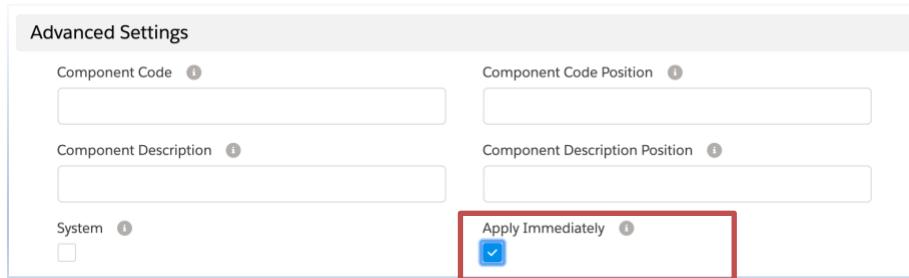
Advanced Settings

Component Code ⓘ Component Code Position ⓘ

Component Description ⓘ Component Description Position ⓘ

System ⓘ

Apply Immediately ⓘ



## EX10: Toner Quantity Product Rule

Objective: Prevent the sales rep from saving the ITPROPACK configuration when they have included too few toners for the number of printers selected. Sales reps must sell at least as many toners as printers.

1. Navigate to Product Rule tab
2. Click New
3. Set field values, then Save

New Product Rule

Information	
* Product Rule Name Toner quantity must be greater than or equal to printer quantity!	Active <input checked="" type="checkbox"/>
* Type Validation	* Conditions Met All
* Scope Product	Advanced Condition <input type="text"/>
Evaluation Event Save	
Evaluation Order <input type="text"/>	Message Toner quantity must be greater than or equal to printer quantity!

4. Click New Configuration Rule in Configuration Rules related list
5. Set field values, then Save

New Configuration Rule

Information	
Rule #	
Active <input checked="" type="checkbox"/>	
Product IT Professional Pack	X
* Product Rule Toner quantity must be greater than or equal to printer quantity	X

6. In a new tab, navigate to Summary Variables object to create a new Summary Variable
7. Click New

8. Set field values, then click Save & New

New Summary Variable

Information

*Variable Name Total quantity of PRINTERTONER	*Aggregate Function Sum
*Target Object Product Option	*Aggregate Field Quantity

Filter Information

Filter Field Product Code	Operator equals
Filter Value PRINTERTONER	Constraint Field --None--

9. Create another Summary Variable, set field values below, then Save

*Variable Name Total quantity of LASERPRINTER	*Aggregate Function Sum
*Target Object Product Option	*Aggregate Field Quantity

Filter Information

Filter Field Product Code	Operator equals
Filter Value LASERPRINTER	Constraint Field --None--

10. Navigate back to the incomplete Product Rule tab

11. Click New Error Condition in Error Conditions

12. Set field values, then Save

Rule [i](#)

**Toner quantity must be greater than or equal to printer quantity**

Tested Object [i](#)

Tested Field [i](#)

Tested Attribute [i](#)

Tested Variable [i](#)

**Total quantity of PRINTERTONER**

Filter Information

Operator [i](#)

less or equals

Filter Type [i](#)

Variable

Filter Value [i](#)

Filter Variable [i](#)

**Total quantity of LASERPRINTER**

## EX11: Create Configuration Attributes

Objective: Create a Location field that is visible when configuring the ITPROPACK. The values gathered by the configuration attribute will be used to drive logic in EX12 and EX13 but will also be saved to the Quote Line record of each bundle for future reference.

1. Navigate to Setup | Object Manager | Product Option
2. Click New in Custom Fields & Relationships
3. Choose Picklist then click Next
4. Set field values per below screenshot, click Next, Next, then click Save

Step 2. Enter the details Step 2 of 4

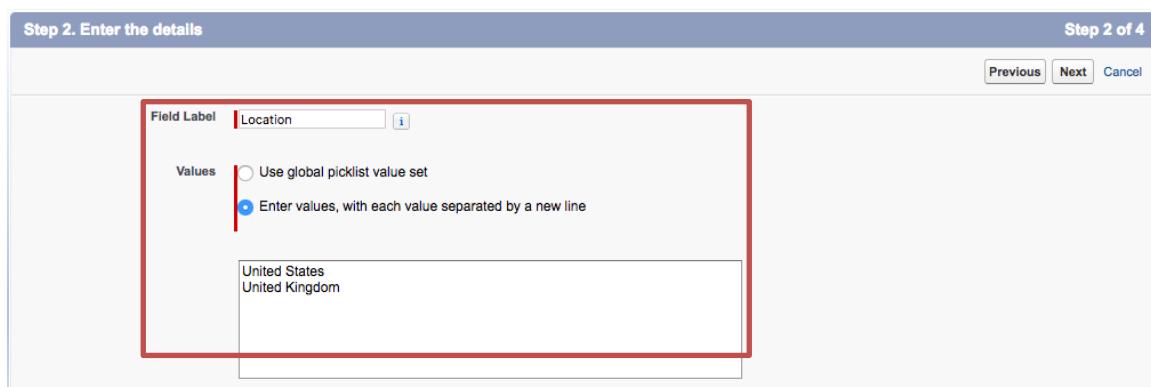
Field Label: Location

Values:

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

United States  
United Kingdom

Previous Next Cancel



5. Navigate to the Setup | Object Manager | Configuration Attribute
6. Under Fields and Relationships, click the Target Field link
7. Click New in Values

Values						Values Help <a href="#">?</a>
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	

8. Enter API name of new Product Option Field and add a new value to Configuration Attribute Record Type, then Save

Record Type Name	Description
<input checked="" type="checkbox"/> Configuration Attribute	Configuration Attribute associated with a Record Type
<input type="checkbox"/> Global Attribute	Definition of an Attribute Item

9. Navigate back to the ITPROPACK product, the click New in Configuration Attributes related list  
 10. Set the following field values, then Save

New Configuration Attribute

**Information**

- \*Product: IT Professional Pack
- \*Attribute Name: Location (ITPROPACK)
- \*Target Field: Location\_\_c
- Required:
- \*Row Order: 10
- \*Column Order: 1
- \*Position: Top

Feature: Search Product Features...

Apply To Product Options:

Hidden:

**Advanced**

- Default Object: --None--
- Show Values:
- Default Field:
- Hidden Values:
- Auto-Select:
- Apply Immediately:

11. Navigate to Setup | Object Manager | Quote Line
12. Click New in Fields & Relationships
13. Choose Picklist then click Next
14. Set field values, click Next, Next, then click Save

Step 2. Enter the details Step 2 of 4

Field Label: Location Location i

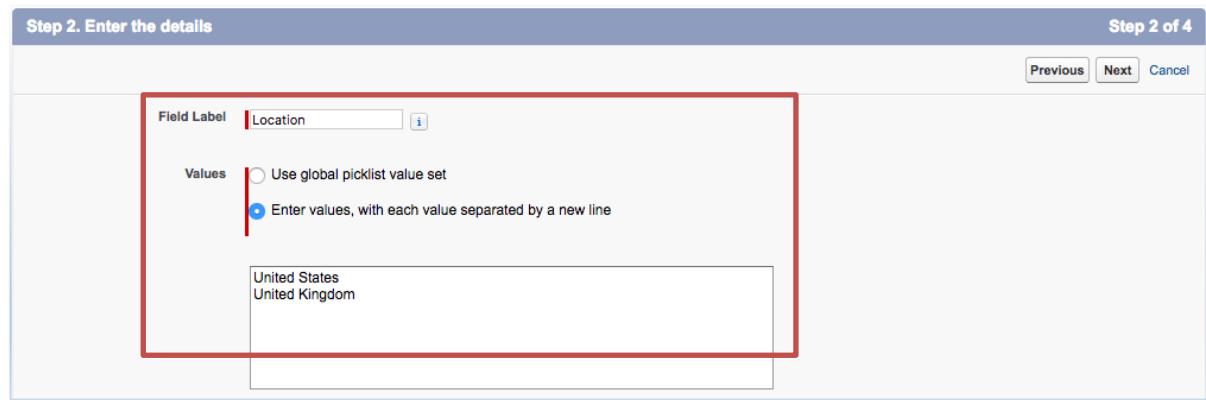
Values:

Use global picklist value set

Enter values, with each value separated by a new line

United States  
United Kingdom

Previous Next Cancel



## EX12: US Items Product Rule

Objective: Simplify the ITPROPACK configuration process by removing the UK Keyboard and A4-sized paper options should the sales rep choose United States for the Location configuration attribute.

1. Navigate to Product Rule tab
2. Click New
3. Set field values below with the Product Rule Name Only show US related products when Location is United States, then Save

New Product Rule

**Information**

* Product Rule Name Only show US related products when Location is Unit	Active <input checked="" type="checkbox"/>
* Type <input type="button" value="i"/>	* Conditions Met <input type="button" value="i"/>
Selection	All
* Scope <input type="button" value="i"/>	Advanced Condition <input type="button" value="i"/>
Product	
Evaluation Event <input type="button" value="i"/>	
Always	

4. Click New Configuration Rule in Configuration Rules related list
5. Set field values, then Save

New Configuration Rule

**Information**

Rule #	
Active <input checked="" type="checkbox"/>	
Product <input type="button" value="i"/>	
<div style="border: 2px solid red; padding: 5px; width: fit-content;">IT Professional Pack</div>	
* Product Rule <input type="button" value="i"/>	
Only show US related products when Location is United States	

6. In a new browser tab navigate to Setup | Object Manager | Error Condition
7. Under Fields & Relationships, click Tested Field
8. Click New in Values

Values

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

9. Enter API name of the Product Option Field used for the configuration attribute, then Save

10. Click the Change link next to Tested Object

API Name	SBQQ__TestedField__c
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	<a href="#">Brian Cloutier</a> , 1/15/2016 8:35 AM
Modified By	<a href="#">Brian Cloutier</a> , 1/15/2016 8:35 AM
<b>Package Information</b>	
Installed Package	<a href="#">SteelBrick CPQ</a>
Available in Versions	24.0 - Current
<b>Picklist Options</b>	
Controlling Field	<a href="#">Tested Object [Change]</a>
<b>Field Dependencies</b>	
<a href="#">New</a> <span style="float: right;"><a href="#">Field Dependencies Help</a> (?)</span>	
No dependencies defined.	

11. Double-click the Location API name Location\_\_c under the Configurable Attributes column, then Save

Showing Columns: 1 - 5 (of 6) < Previous   Next > <a href="#">View All</a> > Go to					
Tested Object:	<a href="#">Quote</a>	<a href="#">Quote Line</a>	<a href="#">Quote Line Group</a>	<a href="#">Product Option</a>	<a href="#">Configuration Attributes</a>
Tested Field:	<a href="#">Group Line Items</a>				
	<a href="#">Unit Price</a>				
	<a href="#">SBQQ__ProductCode__c</a>				
	<a href="#">Location__c</a>				

12. Click OK if a warning popup appears  
 13. Return to the newly created Product Rule  
 14. Click New Error Condition in Error Conditions related list

15. Set field values, then Save

New Error Condition

Information

\* Rule ⓘ  
Only show US related products when Locati... X

Tested Object ⓘ  
Configuration Attributes ▾  
View all dependencies

Tested Field ⓘ  
Location\_\_c ▾  
View all dependencies

Tested Attribute ⓘ  
Search Attribute Items... 🔎

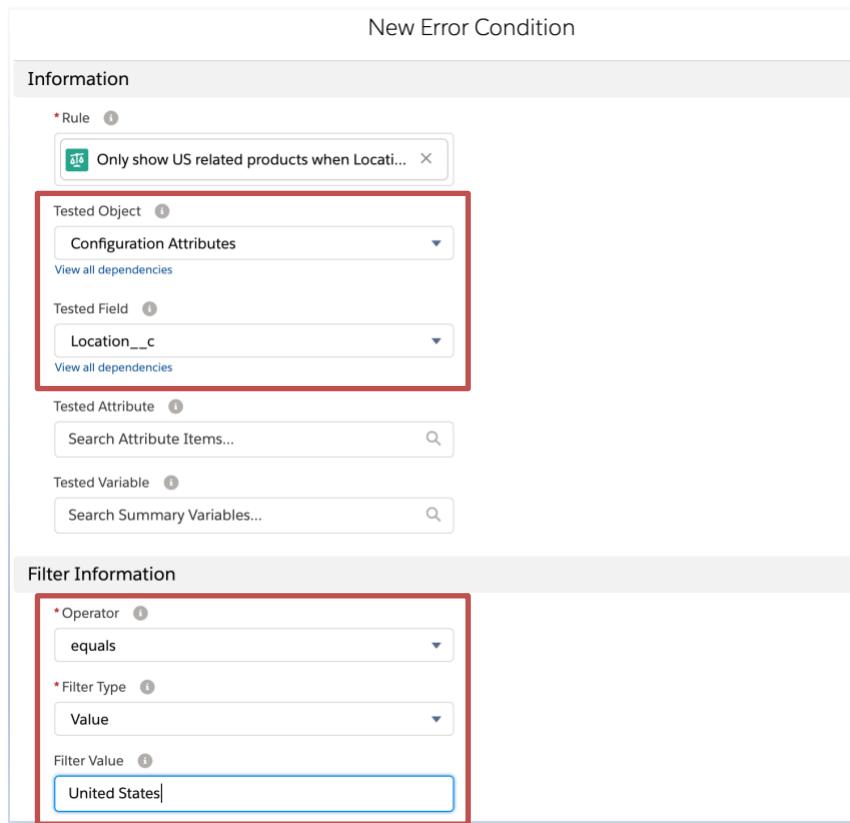
Tested Variable ⓘ  
Search Summary Variables... 🔎

Filter Information

\* Operator ⓘ  
equals ▾

\* Filter Type ⓘ  
Value ▾

Filter Value ⓘ  
United States|



16. Click New Product Action in Actions related list

17. Set field values, then click Save & New

New Product Action

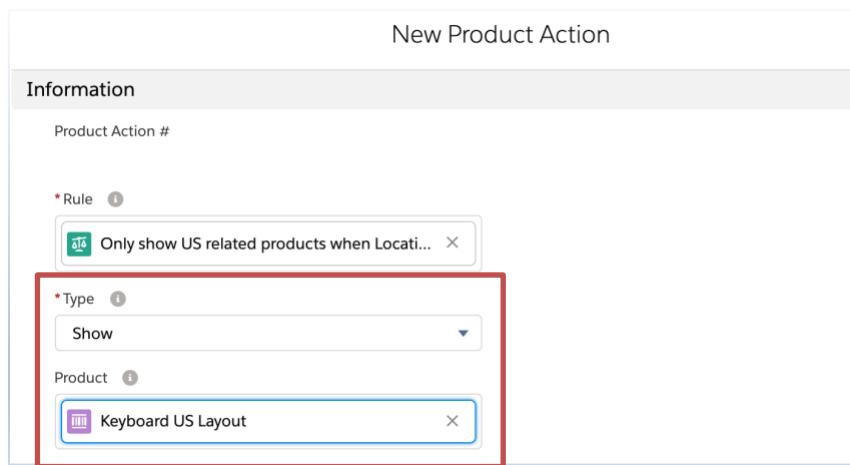
Information

Product Action #

\* Rule ⓘ  
Only show US related products when Locati... X

\* Type ⓘ  
Show ▾

Product ⓘ  
Keyboard US Layout X



**18. Create the remaining Product Actions**

Type	Product
Hide & Remove	Keyboard UK Layout
Show	Printer Paper Letter
Hide & Remove	Printer Paper A4

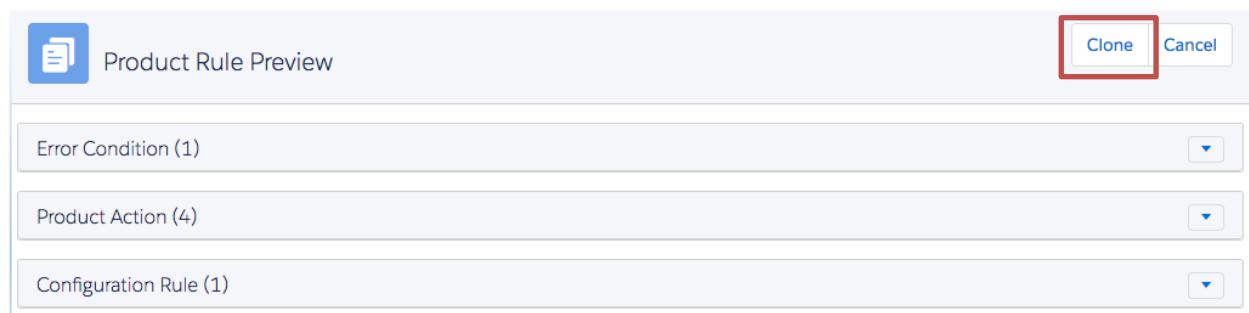
## EX13: UK Items Product Rule

Objective: Clone and modify the US Items Product Rule to remove the US Keyboard and Letter-sized paper options should the sales rep choose United Kingdom for the Location configuration attribute.

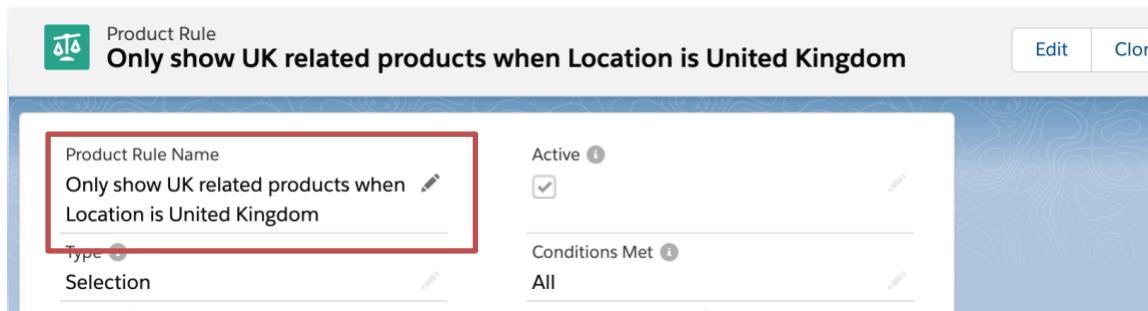
1. Navigate to Product Rule tab
2. Click the Product Rule for the Only show US related products when Location is United States
3. Click Clone with Related



4. Click Clone



5. Update field value, then Save



6. Click the Edit link for the Error Condition

CONDITION #	TESTED OBJECT	TESTED FIELD	TESTED VARIABLE
000003	Configuration Attrib...	Location__c	

New  
Edit  
Delete

View All

7. Update field value, then Save

Filter Information

\* Operator ⓘ  
equals

\* Filter Type ⓘ  
Value

Filter Value ⓘ  
United Kingdom

8. Click the Edit link for the first Product Action

PRODUCT ACTI...	TYPE	PRODUCT	REQUIRED
PA-0000006	Show	Keyboard US Layout	<input type="checkbox"/>
PA-0000007	Hide & Remove	Keyboard UK Layout	<input type="checkbox"/>
PA-0000008	Show	Printer Paper Letter	<input type="checkbox"/>

New  
Edit  
Delete

9. Update field value, then Save

Edit PA-0000006

Product Action #  
PA-0000006

Rule ⓘ  
Only show UK related products when  
Location is United Kingdom

\* Type ⓘ  
Hide & Remove

Product ⓘ  
Keyboard US Layout

Required ⓘ

Repeat steps 8-9 for the remaining Product Actions, switching Hide & Remove to Show, and vice versa

Actions (4)				New
PRODUCT ACTION #	TYPE	PRODUCT	REQUIRED	
PA-0000006	Hide & Remove	Keyboard US Layout	<input type="checkbox"/>	<input type="button" value="▼"/>
PA-0000007	Show	Keyboard UK Layout	<input type="checkbox"/>	<input type="button" value="▼"/>
PA-0000008	Hide & Remove	Printer Paper Letter	<input type="checkbox"/>	<input type="button" value="▼"/>
PA-0000009	Show	Printer Paper A4	<input type="checkbox"/>	<input type="button" value="▼"/>

[View All](#)

## EX14: Create a Discount Schedule

Objective: Create a discount schedule so that the customer receives a discount for buying greater quantities of Printer Paper Letter, increasing the discount for every 10 units purchased up to a limit.

1. Navigate to Discount Schedules tab, then click New
2. Set field values, then Save

New Discount Schedule

Information	
* Schedule Name Steps of 10 units	Aggregation Scope ⓘ Quote
* Type ⓘ Range	Cross Products ⓘ <input type="checkbox"/>
* Discount Unit ⓘ Percent	Cross Orders ⓘ <input type="checkbox"/>
Description ⓘ	Include Bundled Quantities ⓘ <input type="checkbox"/>

3. Click Edit Tiers button on the Discount Schedule details page

Discount Schedule  
**Steps of 10 units**

Schedule Name Steps of 10 units	Aggregation Scope ⓘ Quote
Type ⓘ Range	Cross Products ⓘ <input type="checkbox"/>
Discount Unit ⓘ Percent	Cross Orders ⓘ <input type="checkbox"/>

Edit **Edit Tiers**

4. Set field values below, then Save

Edit Tiers

#	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		10	+ -

5. Navigate to the PRINTERPAPERLETTER product

6. Set Discount Schedule, then Save

Salesforce CPQ Discounting

Non Discountable <span style="color: gray;">i</span>	Non Partner Discountable <span style="color: gray;">i</span>
<input type="checkbox"/>	<input type="checkbox"/>
<b>Discount Schedule <span style="color: gray;">i</span></b>	<b>Discount Category <span style="color: gray;">i</span></b>
<div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"><span style="font-size: 20px; color: #0070C0;">✎</span> Steps of 10 units <span style="margin-left: auto;">X</span></div>	<input type="text" value="Search Discount Categories..."/> <span style="color: #0070C0;">🔍</span>
Term Discount Schedule <span style="color: gray;">i</span>	Compound Discount (%) <span style="color: gray;">i</span>
<input type="button" value="Search Discount Schedules"/> <span style="color: gray;">Q</span>	

## EX15: Printer Maintenance Kit Price Rule

Objective: Create a rule that automatically updates the quantity of the Printer Maintenance Kit product to exactly 2 times the quantity of printers.

1. Navigate to the Price Rules tab
2. Click New
3. Set field values with Product Rule Name Set quantity of PRINTERMAINTKIT to twice the quantity of LASERPRINTER, then Save

Information

\* Price Rule Name  
Set quantity of PRINTERMAINTKIT to twice the quantity of LASERPRINTER

\* Evaluation Scope  
Calculator

Active

\* Conditions Met  
All

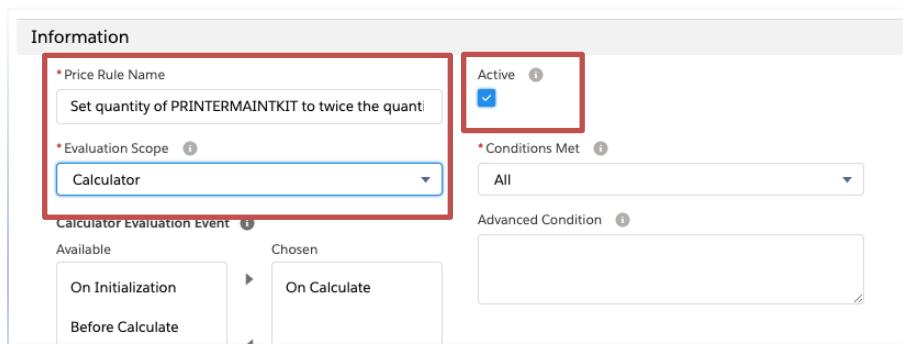
Calculator Evaluation Event

Available Chosen

On Initialization On Calculate

Before Calculate

Advanced Condition



4. Click New in Price Conditions related list
5. Set field values, then Save & New

Price Rule

Set quantity of PRINTERMAINTKIT to twice the quantity of LASERPRINTER

Object  
Quote Line

Field  
Product Code

Tested Variable

Tested Formula

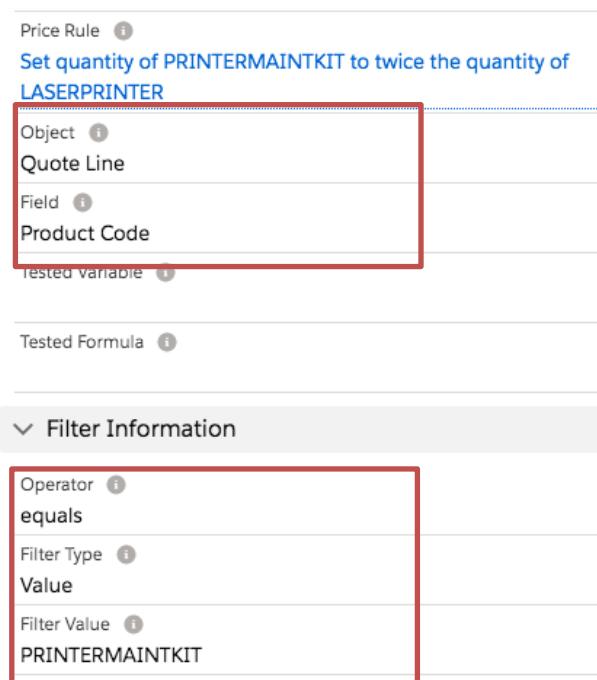
Filter Information

Operator equals

Filter Type

Value

Filter Value  
PRINTERMAINTKIT



6. In a new tab, navigate to Setup | Object Manager | Price Action
7. Under Fields & Relationships, click the Target Field link
8. Click New in Values

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 (%)	Discount (%)	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM

9. Enter API name of the Quote Line Quantity field, then Save



10. Navigate to Summary Variables, then click New

11. Set field values, then Save

\* Variable Name  
Total quantity of LASERPRINTER multiplied by 2

\* Aggregate Function  
Sum

\* Target Object  
Quote Line

\* Aggregate Field  
Quantity

Filter Information

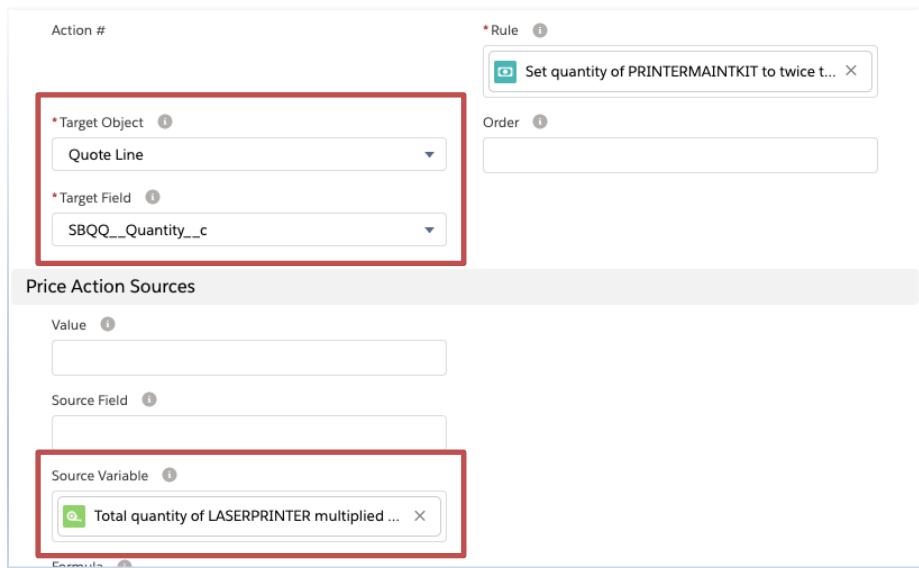
Filter Field: Product Code  
Operator: equals  
Filter Value: LASERPRINTER  
Constraint Field: -None-

Composite Information

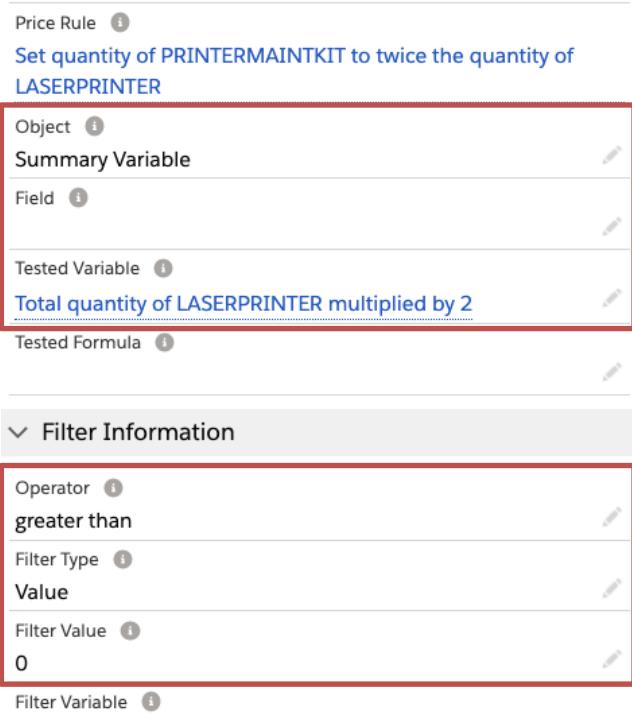
Composite Operator: Multiply  
Variable Element: Search Summary Variables...  
Value Element: 2.0000

12. Return to the original Price Rule, then click New in Price Action

### 13. Set field values, then Save



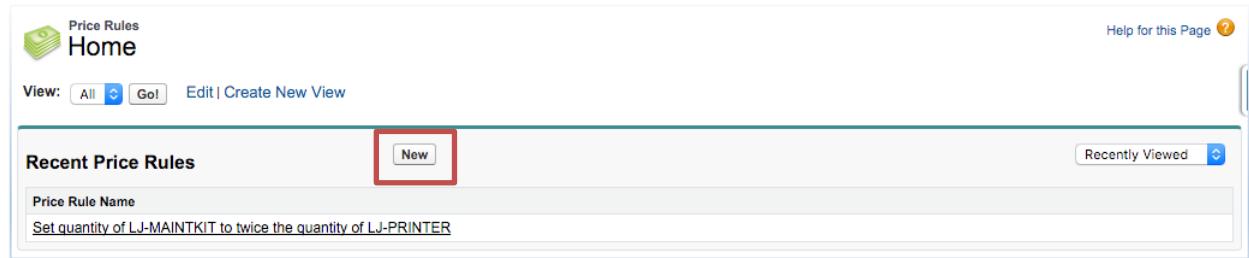
### 14. BONUS STEP: To prevent the Price Rule from firing when there is no Laser Printer on the Quote, add an additional Price Condition to the Price Rule with the values below



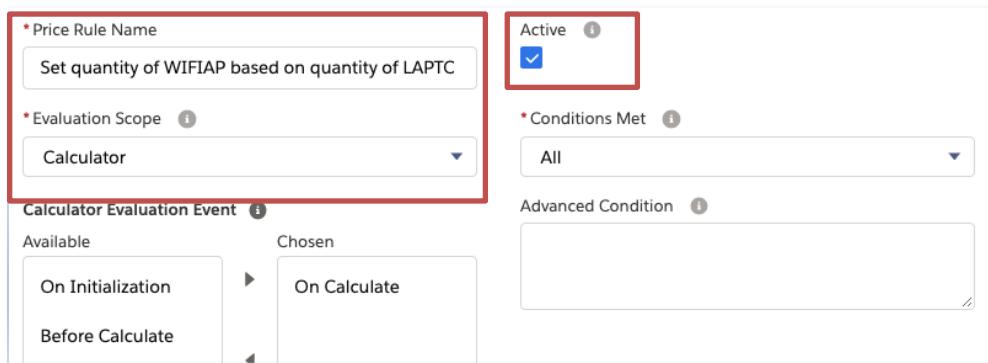
## EX16: WiFi Access Point Price Rule

Objective: Create a rule that automatically sets the quantity of WiFi Access Points to ensure that 1 WiFi Access Point is included for every twelve 15" Laptops , and that fractional quantities are not used.

1. Navigate to the Price Rules tab
2. Click New



3. Set field values with the Price Rule Name Set quantity of WIFIAP based on quantity of LAPTOP, then Save



4. Click New in Price Conditions related list

## 5. Set field values, then Save

The screenshot shows the configuration of a Price Rule. The rule is titled "Set quantity of WIFIAP based on quantity of...". The "Object" is set to "Quote Line" and the "Field" is "Product Code". A red box highlights these settings. Below this, there is a search bar for "Tested variable" and a section for "Tested Formula".

**Filter Information**

A red box highlights the "Filter Information" section. It contains fields for "Operator" (set to "equals"), "Filter Type" (set to "Value"), and "Filter Value" (set to "WIFIAP").

6. In a new tab, navigate to Summary Variables
7. Click New
8. Set field values, then Save

The screenshot shows the configuration of a new Summary Variable. The variable name is "Total quantity of LAPTOP15 divided by 12". The "Target Object" is "Quote Line". A red box highlights these settings.

**Aggregate Function**

A red box highlights the "Aggregate Function" section, which is set to "Sum" and "Aggregate Field" is "Quantity".

**Filter Information**

A red box highlights the "Filter Information" section. It contains fields for "Filter Field" (set to "Product Code") and "Filter Value" (set to "LAPTOP15").

**Composite Information**

A red box highlights the "Composite Operator" section, which is set to "Divide". The "Variable Element" is a search bar for "Search Summary Variables..." and the "Value Element" is set to "12.0000".

9. Return to the newly created Price Rule

10. Click New in Price Action related list

11. Set field values, then click Save & New

Action # 1

Rule Set quantity of WIFIAP based on quantity of AP-MBPRO

\*Target Object Quote Line

\*Target Field SBQQ\_\_Quantity\_\_c

Order 10

**Price Action Sources**

Value

Source Field

Source Variable Total quantity of LAPTOP15 divided by 12

This screenshot shows the configuration of a new Price Action. It includes fields for the Action number (1), Rule name (Set quantity of WIFIAP based on quantity of AP-MBPRO), Target Object (Quote Line), Target Field (SBQQ\_\_Quantity\_\_c), Order (10), and a Source Variable (Total quantity of LAPTOP15 divided by 12). The Source Variable field is highlighted with a red box.

12. Set field values, then Save

Action #

\*Rule Set quantity of WIFIAP based on quantity of...

\*Target Object Quote Line

\*Target Field SBQQ\_\_Quantity\_\_c

Order 20

**Price Action Sources**

Value

Source Field

Source Variable Search Summary Variables...

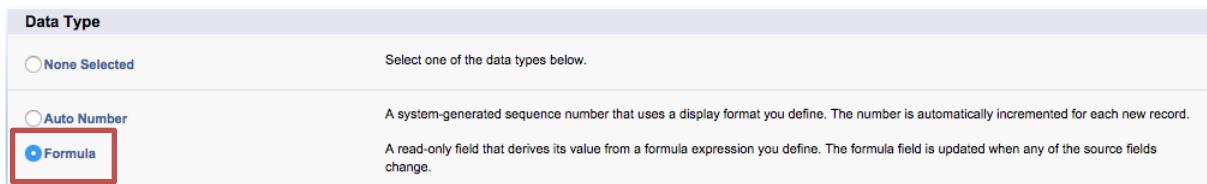
Formula CEILING(SBQQ\_\_Quantity\_\_c)

This screenshot shows the configuration of a new Price Action. It includes fields for the Action number, Rule (Set quantity of WIFIAP based on quantity of AP-MBPRO), Target Object (Quote Line), Target Field (SBQQ\_\_Quantity\_\_c), Order (20), and a Formula (CEILING(SBQQ\_\_Quantity\_\_c)). The Formula field is highlighted with a red box.

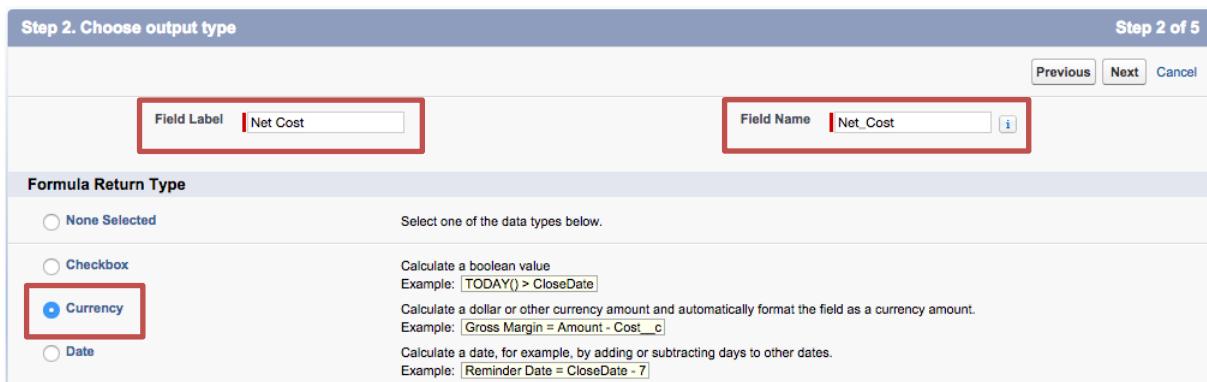
## EX17: Total Cost of Hardware Price Rule

Objective: Create a rule to automatically update a custom quote-level field to represent the total cost of only products in the Hardware product family.

1. Navigate to Setup | Object Manager | Quote Line
2. Under Fields & Relationships, click New
3. Choose Formula then click Next



4. Set field values, then click Next

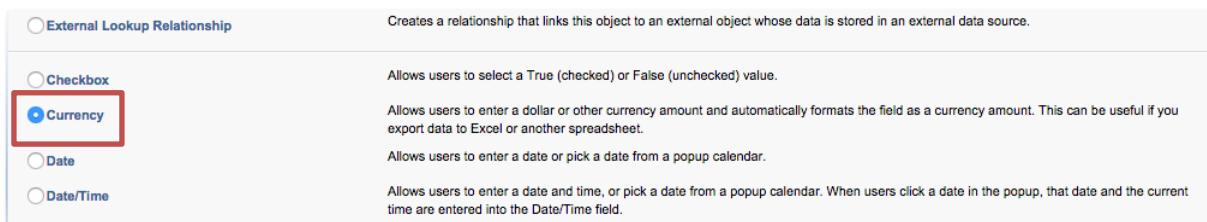


5. Set formula as described below, then click Next, Next, Save

SBQQ\_\_Cost\_\_r.SBQQ\_\_UnitCost\_\_c \* SBQQ\_\_Quantity\_\_c

6. Navigate to Setup | Object Manager | Quote
7. Under Fields & Relationships, click New

8. Choose Currency then click Next



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

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

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

Field Name  i

Previous Next Cancel

10. Navigate to the Price Rules tab

11. Click New

Price Rules Home Help for this Page ?

View: All Go! Edit | Create New View

Recent Price Rules New Recently Viewed ?

12. Set field values, then Save

\* Price Rule Name  i

\* Evaluation Scope i  ?

Calculator Evaluation Event i

Available	Chosen
On Initialization	On Calculate
Before Calculate	

Active  i

\* Conditions Met i  ?

Advanced Condition i

13. Navigate to Setup | Object Manager | Price Action

14. Under Fields & Relationships, click the Target Field link

Edit	 <a href="#">Source Variable</a>	SBQQ__SourceVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	<input checked="" type="checkbox"/>	Admin User, 5/16/2016 1:12 PM
Edit   Replace	 <a href="#">Target Field</a>	SBQQ__Field__c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM
Edit   Replace	 <a href="#">Target Object</a>	SBQQ__TargetObject__c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM

15. Click New in Values

Values						Values Help ?
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 (%)	Discount (%)	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	

16. Enter API name of the new Quote Field, then Save

Total\_Cost\_of\_Hardware\_Products\_\_c

17. Navigate to Setup | Object Manager | Summary Variable

18. Under Fields & Relationships, click the Aggregate Field link

Custom Fields & Relationships							Custom Fields & Relationships Help ?
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit   Replace	Aggregate Field	SBQQ__AggregateField__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM
Edit   Replace	Aggregate Function	SBQQ__AggregateFunction__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM
Edit   Replace	Composite Operator	SBQQ__CompositeOperator__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM

19. Click New in Values

Values						Values Help ?
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit	Quantity	Quantity	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	

20. Enter API name of the new Quote Line Field, then Save

Net\_Cost\_\_c

21. Navigate to the Summary Variables tab and click New

22. Set field values, then Save

The screenshot shows the 'Variable Definition' screen. It includes two main sections: 'Variable Name' and 'Aggregate Function'. The 'Variable Name' section contains fields for 'Variable Name' (Total Cost of Hardware Products) and 'Target Object' (Quote Line). The 'Aggregate Function' section contains fields for 'Aggregate Function' (Sum) and 'Aggregate Field' (Net\_Cost\_\_c). Below these, there is a 'Filter Information' section with fields for 'Filter Field' (Product Family), 'Filter Value' (Hardware), 'Operator' (equals), and 'Constraint Field' (None).

23. Return to the original Price Rule, click New in the Price Action related list

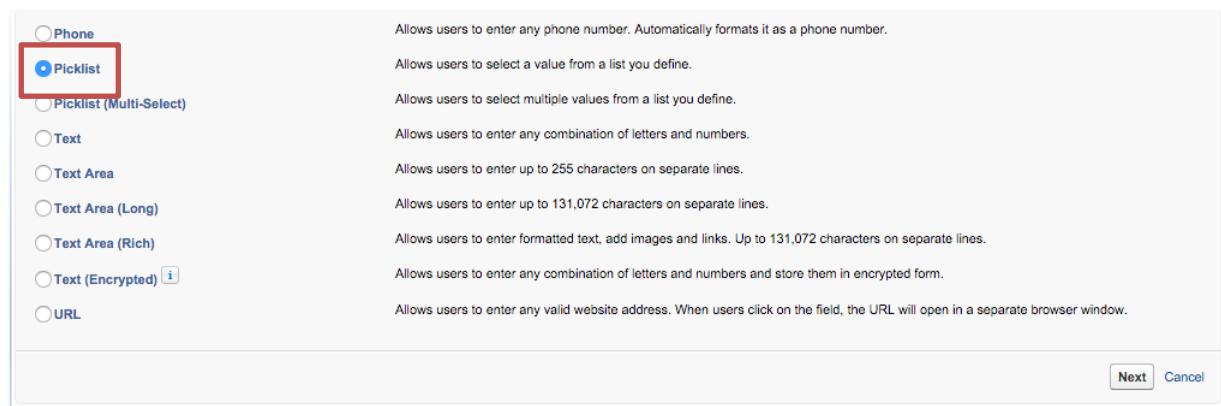
24. Set field values, then Save

The screenshot shows the 'Price Action' screen. It includes sections for 'Action #' and 'Rule'. Under 'Action #', there are fields for 'Target Object' (Quote) and 'Target Field' (Total\_Cost\_of\_Hardware\_Products\_\_c). Under 'Rule', there is a field for 'Rule' (Total Cost of Hardware Products). Below these, there is a 'Price Action Sources' section with fields for 'Value' and 'Source Field'. At the bottom, there is a 'Source Variable' section with a field for 'Source Variable' (Total Cost of Hardware Products).

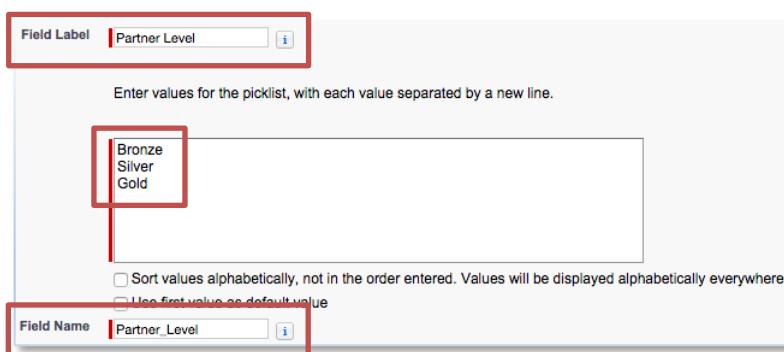
## EX18: Partner Discount Price Rule

Objective: Create a rule to automatically update the Partner Discount quote line field based on the custom Account field named Partner Level. The discount percent will be either 10, 20, or 30 for bronze, silver, or gold, respectively.

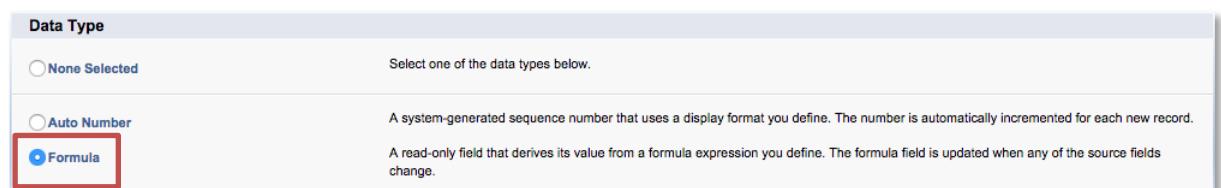
1. Navigate to Setup | Object Manager | Account
2. Under Fields & Relationships, click New
3. Choose Picklist then click Next



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



5. Navigate to Setup | Object Manager | Quote
6. Under Fields & Relationships, click New
7. Choose Formula then click Next



8. Set field values, then click Next

Step 2. Choose output type Step 2 of 5

Field Label | Partner Level

Field Name | Partner\_Level

Percent  
 Text

Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Create a text string, for example, by concatenating other text fields.  
Example: `Full Name = LastName & ", " & FirstName`

Previous Next Cancel

9. Set formula as described below, then click Next, Next, Save

`TEXT(SBQQ__Account__r.Partner_Level__c)`

10. Navigate to the Price Rules tab, click New

11. Set field values, then Save

\* Price Rule Name  
Partner Discount

\* Evaluation Scope  
Calculator

Active

\* Conditions Met  
All

Calculator Evaluation Event  
Available: On Initialization  
Chosen: On Calculate

Advanced Condition

12. Navigate to Setup | Object Manager | Price Condition | Fields and Relationships

13. Click the link for the field named “Field”

14. Click New in Values

Values

New

Action	Values	API Name	Default	Chart Colors	Modified By
Edit	Product Code	Product Code	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM

Values Help ?

15. Enter API name of new Quote field, then Save

Partner\_Level\_\_c

16. Navigate back to the Price Rule, then click New in Price Conditions related list

17. Set field values, click Save

Price Rule

Partner Discount - Simple

Object: Quote

Field: Partner\_Level\_\_c

Tested Variable: Search Summary Variables...

Tested Formula:

Filter Information

Operator: not equals

Filter Type: Value

Filter Value:

18. Navigate to Setup | Object Manager | Price Action

19. Click the Target Field link

Edit	Source Variable	SBQQ_SourceVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	<input checked="" type="checkbox"/>	Admin User, 5/16/2016 1:12 PM
Edit   Replace	Target Field	SBQQ_Field__c	SteelBrick CPQ	Picklist	<input type="checkbox"/>	Admin User, 5/16/2016 1:12 PM
Edit   Replace	Target Object	SBQQ_TargetObject__c	SteelBrick CPQ	Picklist	<input type="checkbox"/>	Admin User, 5/16/2016 1:12 PM

20. Click New in Values

Values						Values Help (?)
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 (%)	Discount (%)	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	

21. Enter API name of the Quote Line Partner Discount field, then Save

The screenshot shows a field configuration interface. A single input field contains the API name "SBQQ\_\_PartnerDiscount\_\_c". This field is highlighted with a red rectangular border.

22. Return to the Price Rule, then click New in Price Actions

23. Set field values and formula body as described below, then Save

CASE(SBQQ\_\_Quote\_\_r.Partner\_Level\_\_c,"Bronze",10,"Silver",20,"Gold",30,0)

The screenshot shows the "Price Action Sources" configuration screen. It includes sections for "Action #", "Target Object", "Target Field", "Value", "Source Field", "Source Variable", and "Formula". The "Formula" section contains the CASE statement provided in the previous step. This entire "Formula" section is highlighted with a red rectangular border.

Action #	4
* Target Object	Quote Line
* Target Field	SBQQ__PartnerDiscount__c
Price Action Sources	
Value	
Source Field	
Source Variable	Search Summary Variables... <input type="button" value="🔍"/>
Formula	CASE(SBQQ__Quote__r.Partner_Level__c, "Bronze",10, "Silver",20, "Gold",30, 0)

## EX19: Create a Lookup Object

Objective: Create a custom object to represent a discount matrix of possible partner discount and product family combinations, to be used in EX20.

1. Navigate to Setup | Object Manager
2. Click Create, the select Custom Object
3. Set field values, then Save

**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
-------------	------------------------	------------------

Description

Context-Sensitive Help Setting  Open the standard Salesforce.com Help & Training window  
 Open a window using a Visualforce page

Content Name

**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    
Display Format  Example: A-{0000} [What Is This?](#)  
Starting Number

**Object Creation Options (Available only when custom object is first created)**

Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

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

**Step 1. Enter the Details** Step 1 of 3

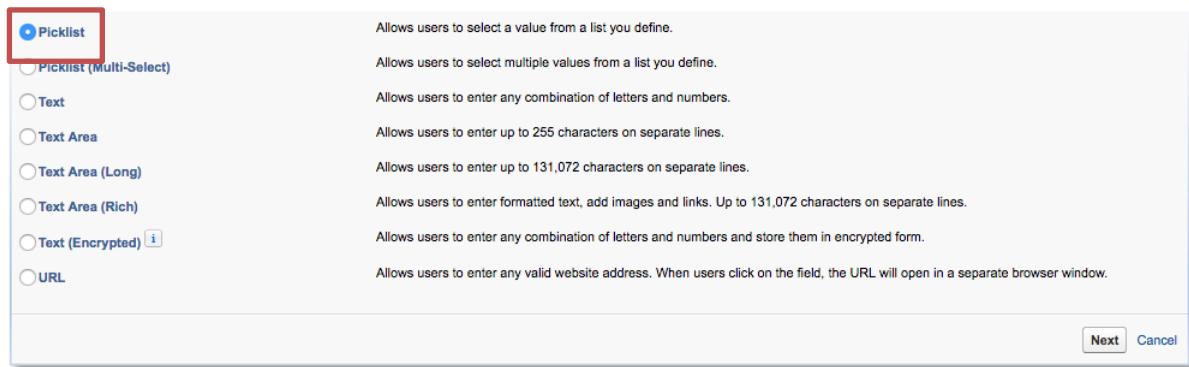
Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object	Partner Level Discount
Tab Style	 Cup 

5. Under Fields & Relationships, click New

6. Choose Picklist then click Next



7. Set field values, click Next, Next, then click Save & New

Step 2. Enter the details Step 2 of 4

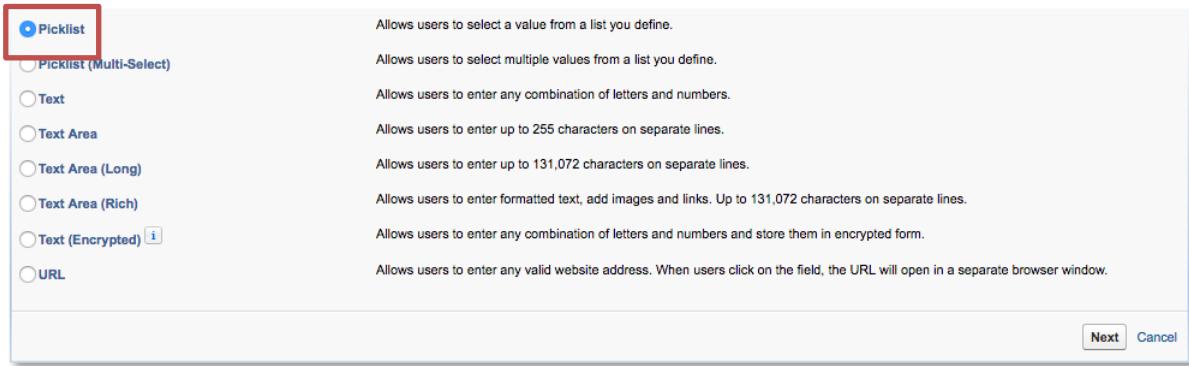
Field Label  i

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

Bronze  
Silver  
Gold

Previous Next Cancel

8. Choose Picklist then click Next



9. Set field values as shown below, click Next, Next, then click Save & New

Step 2. Enter the details Step 2 of 4

Field Label  [i](#)

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

Hardware  
Software  
Support

Previous Next Cancel

10. Choose Number then click Next

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number Allows users to enter any number. Leading zeros are removed.

Percent Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

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.

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

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

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

Field Name  [i](#)

Previous Next Cancel

12. Navigate to Partner Level Discount tab

13. Click New

14. Set Fields, then Save & New

Partner Level Discount Name	Product Family
	<input type="text" value="Hardware"/>
Partner Level	Partner Discount
<input type="text" value="Bronze"/>	<input type="text" value="5.00"/>

15. Create remaining Partner Discount Level records per table:

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

## EX20: Partner Discounts by Product Family

Objective: Create a rule to automatically set the value of Partner Discount based on the account Partner Level as well as the quote line Product Family by querying the Partner Level Discount records created in EX19.

1. Navigate to Setup | Object Manager | Price Rules
2. Under Fields & Relationships, click the Lookup Object link

Edit   Replace	Evaluation Scope	SBQQ__TargetObject__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit   Replace	Lookup Object	SBQQ__LookupObject__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit	Product	SBQQ__Product__c	SteelBrick CPQ	Lookup(Product)	✓ Admin User, 5/16/2016 1:12 PM

3. Click New in Values

Values		New	Values Help	
Action	Values	API Name	Default	Chart Colors
Edit	SBQQ__LookupData__c	SBQQ__LookupData__c	<input type="checkbox"/>	Assigned dynamically Admin User, 7/18/2017 8:26 AM

4. Enter API name of the Partner Level Discount Object, then Save



The screenshot shows a search or filter interface with a single input field. The text 'Partner\_Level\_Discount\_\_c' is typed into the field and is highlighted with a red rectangular box. Below the input field is a dropdown menu with several options listed.

5. Navigate to the Price Rules tab
6. Click New

## 7. Set field values, then Save

The screenshot shows the 'Price Rule' configuration page. Key fields include:

- Price Rule Name:** Partner Discount by Product Family
- Active:** Checked (highlighted with a red box)
- Evaluation Scope:** Calculator
- Calculator Evaluation Event:** Available: On Initialization, Before Calculate, After Calculate; Chosen: On Calculate
- Configurator Evaluation Event:** -None-
- Product:** Search Products... (input field)
- Evaluation Order:** (empty input field)
- Lookup Object:** Partner\_Level\_Discount\_\_c (highlighted with a red box)

## 8. Click New in Price Conditions

## 9. Set field values, click Save

The screenshot shows the 'Price Condition' configuration page. Key fields include:

- Price Rule:** Partner Discount by Product Family
- Object:** Quote (highlighted with a red box)
- Field:** Partner\_Level\_\_c
- Tested Variable:** Search Summary Variables... (input field)
- Tested Formula:** (empty input field)
- Filter Information:**
  - Operator:** not equals (highlighted with a red box)
  - Filter Type:** Value (highlighted with a red box)
  - Filter Value:** (empty input field)

## 10. Navigate to Setup | Object Manager | Lookup Query

11. Under Fields & Relationships, click the Tested Field link

Edit	RuleTargetsCalculator	SBQQ__RuleTargetsCalculator_c	SteelBrick CPQ	Formula (Checkbox)		Admin User, 5/16/2016 1:12 PM
Edit   Replace	Tested Field	SBQQ__TestedField_c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM
Edit   Replace	Tested Object	SBQQ__TestedObject_c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM

12. Click New in Values

Values		New	Values Help ?		
Action	Values	API Name	Default	Chart Colors	Modified By
Edit	Product Code	Product Code	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM

13. Enter name of the Quote Line Product Family field and Quote Partner Level field, then

Save

The screenshot shows a single-line text input field. Inside the field, the text 'SBQQ\_\_ProductFamily\_\_c' is followed by a new line character, and then 'Partner\_Level\_\_c' is entered.

14. Navigate back to the Lookup Query object

15. Under Fields & Relationships, click the Lookup Field link

Custom Fields & Relationships							Custom Fields & Relationships Help ?
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit   Replace	Lookup Field	SBQQ__LookupField_c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM
Edit   Replace	Match Type	SBQQ__MatchType_c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM

16. Click New in Values

Values		New	Values Help ?		
Action	Values	API Name	Default	Chart Colors	Modified By
Edit	SBQQ__Category_c	SBQQ__Category_c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM

17. Enter API name of the Product Family and Partner Level from the Partner Level Discount

Object, then Save

The screenshot shows a single-line text input field. Inside the field, the text 'Product\_Family\_\_c' is followed by a new line character, and then 'Partner\_Level\_\_c' is entered.

18. Return to the Price Rule created earlier in this exercise, click New in Lookup Query related list

19. Set field values, then Save & New

Lookup Query #

Price Rule Partner Discount by Product Family

Product Rule Search Product Rules...

Match Type Field Value

Tested Object Quote Line

Tested Field SBQQ\_\_ProductFamily\_\_c

Tested Value (empty)

Tested Configuration Attribute Search Configuration Attributes...

Lookup Information

Operator equals

Lookup Field Product\_Family\_\_c

20. Set field values, then Save

Lookup Query #

Price Rule Partner Discount by Product Family

Product Rule Search Product Rules...

Match Type Field Value

Tested Object Quote

Tested Field Partner\_Level\_\_c

Tested Value (empty)

Tested Configuration Attribute Search Configuration Attributes...

Lookup Information

Operator equals

Lookup Field Partner\_Level\_\_c

21. Navigate to Setup | Object Manager | Price Action

22. Under Fields & Relationships, click the Source Lookup Field link

Edit	<a href="#">Source Field</a>	SBQQ__ValueField_c	SteelBrick CPQ	Text(100)	Admin User, 5/16/2016 1:12 PM
Edit   Replace	<a href="#">Source Lookup Field</a>	SBQQ__SourceLookupField_c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit	<a href="#">Source Variable</a>	SBQQ__SourceVariable_c	SteelBrick CPQ	Lookup(Summary Variable)	✓ Admin User, 5/16/2016 1:12 PM

23. Click New in Values

The screenshot shows a table titled 'Values' with columns: Action, Values, API Name, Default, Chart Colors, and Modified By. A new row is being added, indicated by the 'New' button in the top right. The first row contains 'Edit' for Action, 'SBQQ\_\_Value\_c' for Values, 'SBQQ\_\_Value\_c' for API Name, and 'Assigned dynamically' for Chart Colors.

24. Enter API name of the Partner Discount field from the Partner Level Discount Object, then Save

A single-line text input field containing the API name 'Partner\_Discount\_\_c', which is highlighted with a red border.

25. Return to the Price Rule, click New in Price Action

26. Set field values, then Save

The screenshot shows the 'Price Action Sources' configuration screen. It includes fields for Target Object ('Quote Line'), Target Field ('SBQQ\_\_PartnerDiscount\_\_c'), Value, Source Field, Source Variable (with a search bar), Formula, and Source Lookup Field ('Partner\_Discount\_\_c'). The 'Target Object' and 'Target Field' sections, as well as the 'Source Lookup Field' section, are highlighted with red boxes.

## PREP: Template Content Prep

Objective: Update Template Content by removing dead image references to avoid Document Generation error.

1. Navigate to Template Content tab
2. Change List View to All
3. Click Edit next to the Training Cover Page content
4. In Markup, click the Source button
5. Scroll to the bottom of code and remove following snippet of code

```
<table width="100%">  
    <tbody>  
        <tr>  
            <td style="width:100%; height:300px;">  
                <p style="text-align:right;"></p>  
            </td>  
        </tr>  
    </tbody>  
</table>
```

6. Follow the steps listed above to remove following snippet of code for Template Cover Letter content record

```
<!--  
    <p style="text-align:right; padding-top:250px;"></p>  
-->  
<p>&#160;</p>
```

## EX21: Create a Quote Template

Objective: Create a basic template used to generate simple customer-facing proposals, in PDF format.

7. Navigate to the Quote Templates tab, click New
8. Set field values, then Save

Information

* Template Name <input type="text" value="Workshop Template"/>	Default <input type="checkbox"/>
* Deployment Status <input type="button" value="In Development"/>	Logo Document Id <input type="text"/>
Generator Name <input type="text"/>	Watermark ID <input type="text"/>

Corporate Information

Company Name <input type="text" value="Salesforce"/>	Company Street <input type="text" value="415 Mission Street"/>
Company Slogan <input type="text" value="No Software"/>	Company City <input type="text" value="San Francisco"/>
Company Phone <input type="text"/>	Company State <input type="text" value="CA"/>
Company Fax <input type="text"/>	Company Postal Code <input type="text" value="94105"/>
Company Email <input type="text"/>	Company Country <input type="text" value="US"/>

9. Navigate to any existing quote with line items, then click Preview Document

Quote Q-00033	Edit	Edit Lines	Preview Document <input style="outline: none; border: 2px solid red; padding: 2px;" type="button"/>	Generate Document
<b>Details</b> <input type="button" value="Related"/>	Related List Quick Links <input type="button" value="Quote Lines (10+)"/>			

## EX22: Upload a Logo File

Objective: Add a company logo to appear in the upper-left of the first page of the generated proposal.

1. Switch to Classic, then navigate to the Documents tab
2. Under Document Folders, select the Salesforce CPQ Assets folder, then click Go

The screenshot shows the 'Documents Home' page. At the top, there is a search bar with the placeholder 'Enter keywords to find matching documents.' and a 'Find Document' button. Below the search bar is a section titled 'Document Folders'. A dropdown menu labeled 'Folder' is set to 'Salesforce CPQ Assets'. To the right of the dropdown are 'Go!' and 'Edit | Create New Folder' buttons. A red rectangular box highlights the 'Salesforce CPQ Assets' dropdown menu.

3. Click the document record named Salesforce CPQ Logo
4. Copy the last portion of the URL to obtain the Salesforce ID of the image



5. Navigate to the Quote Template
6. Paste portion of URL into Logo Document ID, then Save

The screenshot shows the configuration page for a Quote Template. It includes fields for 'Template Name' (Workshop Template), 'Deployment Status' (In Development), 'Generator Name', and 'Logo Document Id'. The 'Logo Document Id' field contains the value '0156g000001DBZM', which is highlighted with a red rectangular box. There are also 'Default' and 'Watermark ID' fields, both of which are currently empty and highlighted with blue rectangular boxes.

## EX23: Add Draft Watermark

Objective: Add a watermark that appears behind text on the generated proposal if the Quote field named Watermark Shown is true.

1. Switch to Classic, navigate to the Documents tab
2. Choose the Salesforce CPQ Asset folder (click Go! if already selected)

The screenshot shows the 'Documents Home' interface. At the top, there's a search bar with placeholder text 'Enter keywords to find matching documents.' and a 'Find Document' button. Below that is a section titled 'Document Folders'. It contains a dropdown menu set to 'Salesforce CPQ Assets', a 'Go!' button, and links for 'Edit | Create New Folder'. A red box highlights the 'Salesforce CPQ Assets' dropdown and the 'Go!' button.

3. Click on Draft Watermark document link

The screenshot shows the 'Salesforce CPQ Assets' page. At the top, it says 'Salesforce CPQ Assets' and has links for 'Printable View | Help'. Below that is a navigation bar with 'Folder' set to 'Salesforce CPQ Assets', a dropdown menu, and 'Edit | Create New Folder'. There's also a horizontal menu with letters A through X. The main area is a table with columns: Action, Name, Description, File Size, Last Modified, and Type. It lists two documents: 'Draft Watermark' (80KB, 5/28/2020, png) and 'Salesforce CPQ Logo' (6KB, 5/28/2020, png). A red box highlights the 'Draft Watermark' row.

Action	Name	Description	File Size	Last Modified	Type
Edit   Del   View   Email	Draft Watermark		80KB	5/28/2020	png
Edit   Del   View   Email	Salesforce CPQ Logo		6KB	5/28/2020	png

4. Copy the last portion of URL to obtain the Salesforce ID of the image

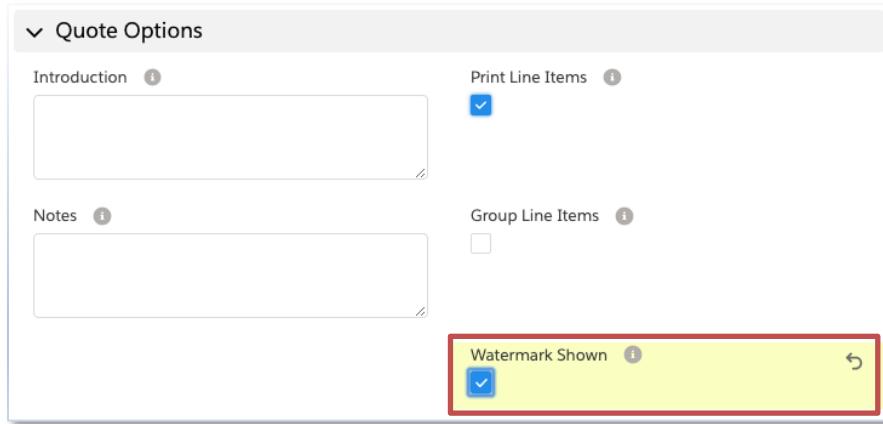
The screenshot shows a web browser's address bar with the URL <https://na30.salesforce.com/01536000001dJ2V>. A red box highlights the ID '01536000001dJ2V' at the end of the URL.

5. Navigate to the Quote Template
6. Paste portion of URL into Watermark ID, then Save

The screenshot shows the 'Quote Template' configuration page. It includes fields for 'Template Name' (Workshop Template), 'Deployment Status' (In Development), 'Generator Name', 'Default' (unchecked), 'Logo Document Id' (0156g000001DBZM), and 'Watermark ID' (0156g000001DBZL). A yellow box with a red border highlights the 'Watermark ID' input field.

7. Navigate to any existing quote with line items

8. On a Quote record update field value below, then Save



9. Click Preview Document to see the draft watermark on the quote document



## EX24: Add Additional Documents

Objective: Allow sales reps to include supplemental PDFs concatenated to the generated proposal.

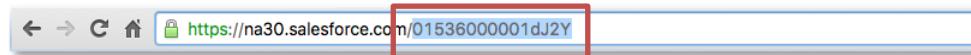
1. Switch to Classic, navigate to the Documents tab
2. Choose the Salesforce CPQ Asset folder (click Go! if already selected)

The screenshot shows the 'Documents Home' interface. At the top, there's a search bar with placeholder text 'Enter keywords to find matching documents.' and a 'Find Document' button. Below that is a section titled 'Document Folders'. It lists a single folder named 'Salesforce CPQ Assets'. To the right of the folder name are two buttons: a blue 'Go!' button and links for 'Edit | Create New Folder'.

3. Click the New Document button
4. Set the field values below and select a sample PDF document (keep file size minimal) to upload, then click Save

The screenshot shows the 'New Document' creation form. It has three main sections: 1. Enter details, 2. Select the File, and 3. Click the "Save" button. In the '1. Enter details' section, fields include 'Document Name' (Sample PDF), 'Document Unique Name' (Sample\_PDF), 'Indicate Document is Internal' (unchecked), 'Externally Available Image' (checked), and a 'Folder' dropdown set to 'Salesforce CPQ Assets'. The '2. Select the File' section contains instructions to enter a file path or browse, and a 'Path/URL to reference' field. The '3. Click the "Save" button' section has a single 'Save' button.

5. Copy the last portion of URL to obtain the Salesforce ID of your document



6. Navigate to the Quote Template

7. Click New Additional Document in Additional Documents

The screenshot shows a software interface with two main sections: 'Sections' and 'Additional Documents'. The 'Sections' section has a 'New Template Section' button. The 'Additional Documents' section has a 'New Additional Document' button, which is highlighted with a red rectangular box. Both sections show a message 'No records to display'.

8. Paste portion of URL into Logo Document ID, enter Display Order, then Save

The screenshot shows a 'Information' dialog box with the following fields:

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

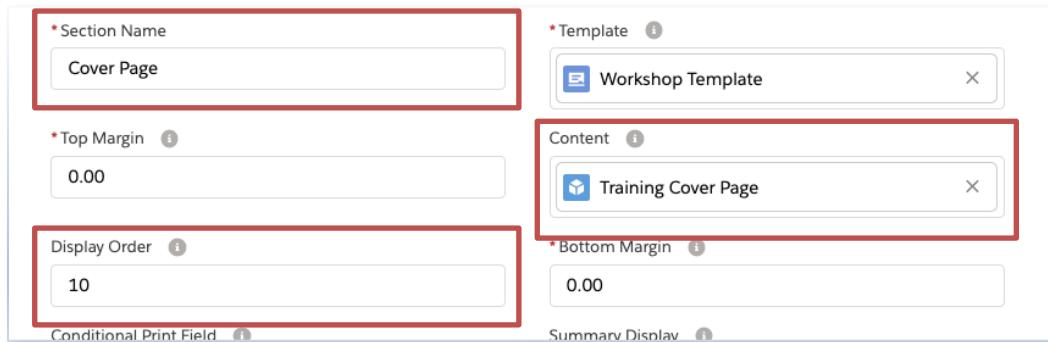
At the bottom are 'Save' and 'Cancel' buttons. A legend at the top right indicates that a red vertical bar next to a field means it is 'Required Information'.

9. Go to a sample Quote and Preview Document, you will see your sample PDF displayed as an Additional Document

## EX25: Assemble Custom Document

Objective: Use provided Template Content to replace the simple structure of the standard proposal with customizable content. The updated proposal will include a cover page, a page for a cover letter, the familiar quote line table, updated headers, and an expanded signature block.

1. Navigate to the Quote Template
2. Click New in Sections related list
3. Set field values, then click Save & New



4. Repeat step 3 to create sections for the following template content:
  - a. Training Cover Letter (display order 20, set page break to Before)
  - b. Training Tail Header (display order 30, set page break to Before)
  - c. Training Prepared For (display order 40)
  - d. Training Line Items (display order 50)
  - e. Training Signature Block (display order 70)
5. For Training Cover Page and Training Cover Letter content, the source contains hardcoded image reference that needs to be removed. Follow the steps in Template Content Prep section of this Exercise Guide.

## EX26: Adjust Line Columns

Objective: Change the Part # column to display Product Name instead, while adjusting the width of the column to accommodate longer text. Reduce the width of the Description column to account for the larger Product Name column.

1. Navigate to the Quote Template
2. Click Edit next to the Part # column in the Line Columns related list

Line Columns (6)			
COLUMN HEADING	DISPLAY ORDER	WIDTH	FIELD NAME
QTY	10	5.00	SBQQ__Quantity__c
PART #	20	10.00	SBQQ__ProductName__c
DESCRIPTION	30	50.00	SBQQ__Description__c
UNIT PRICE	40	10.00	SBQQ__ListPrice__c

3. Update field values, then Save

Template ⓘ Workshop Template

* Column Heading PRODUCT	* Field Name SBQQ__ProductName__c
* Display Order 20	* Alignment Left
* Width 20.00	

4. Click Edit next to the Description column in the Line Columns related list
5. Update field value, then Save

Template ⓘ Workshop Template

* Column Heading DESCRIPTION	* Field Name SBQQ__Description__c
* Display Order 30	* Alignment Left
* Width 40.00	

## EX27: Conditional Discount Column

Objective: Setup the Discount column to appear only when sales reps have manually entered Quote Line discretionary discounts, otherwise the column will disappear and the other columns will grow to cover the gap.

1. Navigate to Setup | Object Manager | Line Column
2. Under Fields & Relationships, click the Conditional Print Field link
3. Click New in Values

The screenshot shows a table with columns: Action, Values, API Name, Default, Chart Colors, and Modified By. The 'Values' column contains 'Group Line Items'. The 'API Name' column contains 'Group Line Items'. The 'Default' column has a checkbox which is unchecked. The 'Chart Colors' column says 'Assigned dynamically'. The 'Modified By' column shows 'Admin User, 7/6/2017 1:32 PM'. At the top right, there is a 'Values Help' link.

4. Enter API name of the Quote Line Additional Disc. (Amt) field, then Save

A screenshot of a search interface. A red box highlights the text 'SBQQ\_\_AdditionalDiscountAmount\_\_c' in a search input field.

5. Navigate to the Quote Template
6. Under Line Columns, Edit the Disc (%) line column

A screenshot of the 'Line Columns' edit screen. It shows a table with columns: PRODUCT, ZU, ZU.00, SBQQ\_\_Productnam..., DESCRIPTION, 30, 50.00, SBQQ\_\_Description\_\_c, UNIT PRICE, 40, 10.00, SBQQ\_\_ListPrice, DISC (%), 50, 10.00, SBQQ\_\_Discoun, EXTENDED, 60, 15.00, SBQQ\_\_NetTota. A red box highlights the 'Edit' button next to the 'SBQQ\_\_ListPrice' field.

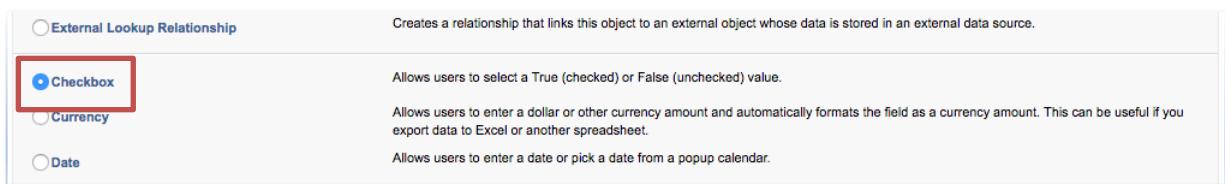
7. Set field value, then Save

A screenshot of the 'Conditional Print Field' configuration screen. It includes fields for 'Conditional Print Field' (set to 'SBQQ\_\_AdditionalDiscountAmount\_\_c'), 'Summary Function' (set to '--None--'), 'Discard Width When Hidden' (unchecked), and 'Summary Label' (empty).

## EX28: Conditional Pricing Columns

Objective: Allow sales reps to control visibility of the Unit Price and Extended columns by creating a Quote checkbox field named Show Pricing Columns. When false, the columns will disappear and the other columns will grow to fill the gap.

1. Navigate to Setup | Object Manager | Quote
2. Under Fields & Relationships, click New
3. Choose Checkbox then click Next



4. Enter Show Pricing Columns as the field label, then click Next, Next, Save



5. Navigate Setup | Object Manager | Line Column
6. Under Fields & Relationships, click the Conditional Print Field link
7. 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, 7/6/2017 1:32 PM		
Edit   Del   Deactivate	SBQQ__AdditionalDiscountAmount__c	SBQQ__AdditionalDiscountAmount__c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 10:52 AM		

8. Enter API name of the Quote Show Pricing Columns field, then Save



9. Navigate to the Quote Template
10. Under Line Column, Edit the Unit Price line column

11. Set field value, then Save

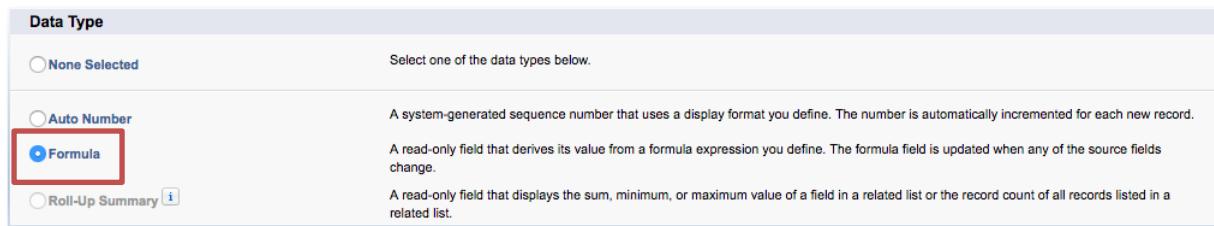


12. Repeat step 11 for the Extended line column

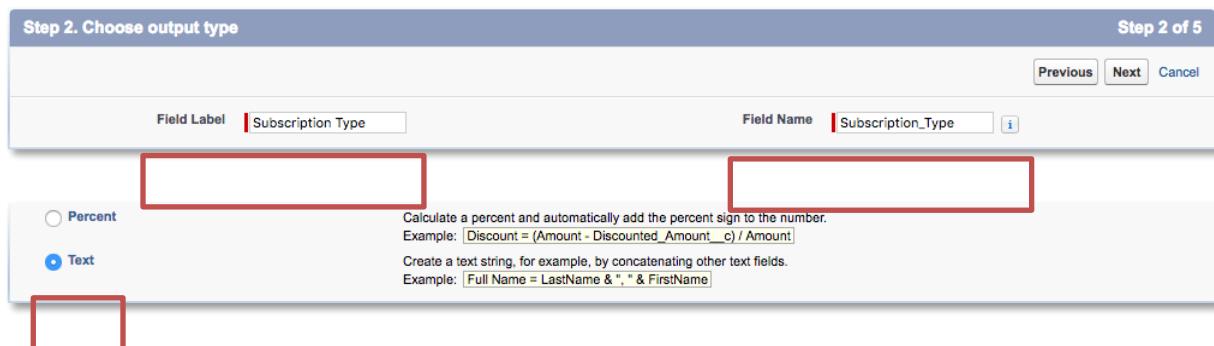
## EX29: Group Subscription Lines

Objective: Separate Quote Lines into two tables, one to show only products that are one-time purchases, the other to show only subscription products.

1. Navigate to Setup | Object Manager | Quote Line
2. Under Fields & Relationships, click New
3. Choose Formula, then click Next



4. Enter Subscription Type as the field label, choose Text as the return type, then click Next



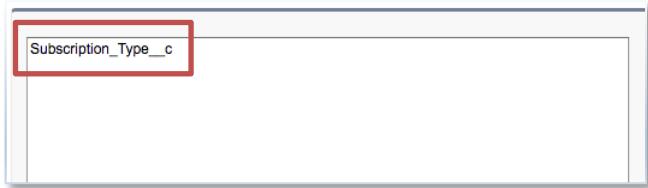
5. Set formula body as described below, then click Next, Next, Save

IF(TEXT(SBQQ\_\_SubscriptionPricing\_\_c) <> "", "Subscription", "One-Time")

6. Navigate to Setup | Object Manager | Template Section
7. Under Fields & Relationships, click the Group Field link
8. Click New in Values

Values						Values Help ?
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit   Del   Deactivate	Product Family	Product Family	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM	
Edit   Del   Deactivate	Subscription Category	Subscription Category	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM	

9. Enter API name of the Quote Line Subscription Type field, then Save



10. Return to the Quote Template

11. Under Sections related list, edit the Line Items section

Sections (6)			
SECTION NAME	DISPLAY ORDER	CONTENT	TOP MARGIN
Cover Page	10	Training Cover Page	0.00 ▾
Cover Letter	20	Training Cover Letter	0.00 ▾
Tail Header	30	Training Tail Header	0.00 ▾
Prepared For Infor...	40	Training Prepared For	0.00 ▾
Line Items	50	Training Line Items	0.00 ▾
Signature Block	70	Training Signature Block	0.00

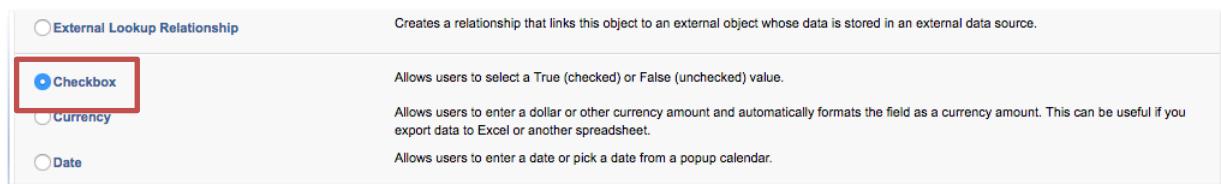
12. Set field value, then Save

A screenshot of the "Edit" screen for the "Line Items" section. There are several configuration fields: "Display Order" (set to 50), "Bottom Margin" (set to 0.00), "Conditional Print Field" (set to "--None--"), "Summary Display" (set to "--None--"), "Print Quote Totals" (unchecked), "Group Field" (set to "Subscription\_Type\_\_c" and highlighted with a red box), "Roll-Up Field" (set to "--None--"), and "Border Color" (empty). The "Group Field" dropdown is specifically highlighted with a red box.

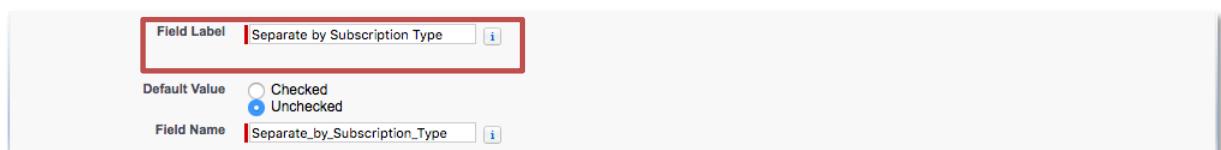
## EX30: Conditional Line Item Tables

Objective: Allow sales reps to control whether the line item table combines all line items into a single table, or separate one-time and subscription products into two tables. The custom Quote field named Separate by Subscription Type will determine if separate tables are created.

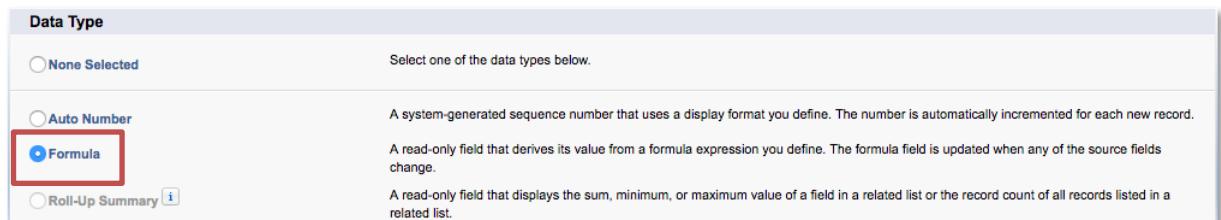
1. Navigate to Setup | Object Manager | Quote
2. Under Fields & Relationships, click New
3. Choose Checkbox, then click Next



4. Enter Separate by Subscription Type as the field label, then click Next, Next, Save and New



5. Choose Formula then click Next



6. Enter Combine Subscription Type as the field label, choose Checkbox as the return type, then click Next

**Step 2. Choose output type**      **Step 2 of 5**

Field Label	Combine Subscription Type	Field Name	Combine_Subscription_Type
-------------	---------------------------	------------	---------------------------

**Formula Return Type**

Select one of the data types below.

None Selected

Checkbox

Calculate a boolean value  
Example: `TODAY() > CloseDate`

7. Set formula body as described below, then click Next, Next, Save

`IF(Separate_by_Subscription_Type__c, FALSE, TRUE)`

8. Navigate back to Object Manager | Template Section

9. Under Fields & Relationships, click the Conditional Print Field link

10. Click New in Values

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, 7/6/2017 1:32 PM
Edit   Del   Deactivate	Primary	Primary	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM
Edit   Del   Deactivate	Show_Cover_Page__c	Show_Cover_Page__c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 11:16 AM

11. Enter API names of the custom Quote fields, then Save

12. Navigate back to Quote Template

13. Under Sections related list, edit the Line Item section

Tail Header	30	Training Tail Header	0.00	
Prepared For Infor...	40	Training Prepared For	0.00	
Line Items	50	Training Line Items	0.00	<b>Edit</b>
Signature Block	70	Training Signature Block	0.00	Delete

14. Set field value, then Save

The screenshot shows the 'Workshop Template' configuration page. The 'Section Name' is set to 'Grouped Line Items'. The 'Content' is set to 'Training Line Items'. The 'Top Margin' and 'Bottom Margin' are both set to 0.00. The 'Display Order' is 50. The 'Conditional Print Field' is set to 'Separate\_by\_Subscription\_Type\_\_c'. The 'Group Field' is set to 'Subscription\_Type\_\_c'. The 'Print Quote Totals' checkbox is unchecked. The 'Border Color' is set to 'None'. The entire 'Section Name' input field and the 'Group Field' dropdown are highlighted with a red box.

15. Click the updated Grouped Line Items section link

The screenshot shows a table titled 'Sections (6)'. The columns are 'SECTION NAME', 'DISPLAY ORDER', 'CONTENT', and 'TOP MARGIN'. The rows are: Cover Page (Display Order 10, Content Training Cover Page, Top Margin 0.00), Cover Letter (Display Order 20, Content Training Cover Letter, Top Margin 0.00), Tail Header (Display Order 30, Content Training Tail Header, Top Margin 0.00), Prepared For Infor... (Display Order 40, Content Training Prepared For, Top Margin 0.00), Grouped Line Items (Display Order 50, Content Training Line Items, Top Margin 0.00), and Signature Block (Display Order 70, Content Training Signature Block, Top Margin 0.00). The 'Grouped Line Items' row is highlighted with a red box.

SECTION NAME	DISPLAY ORDER	CONTENT	TOP MARGIN
Cover Page	10	Training Cover Page	0.00
Cover Letter	20	Training Cover Letter	0.00
Tail Header	30	Training Tail Header	0.00
Prepared For Infor...	40	Training Prepared For	0.00
Grouped Line Items	50	Training Line Items	0.00
Signature Block	70	Training Signature Block	0.00

16. Click the Clone button

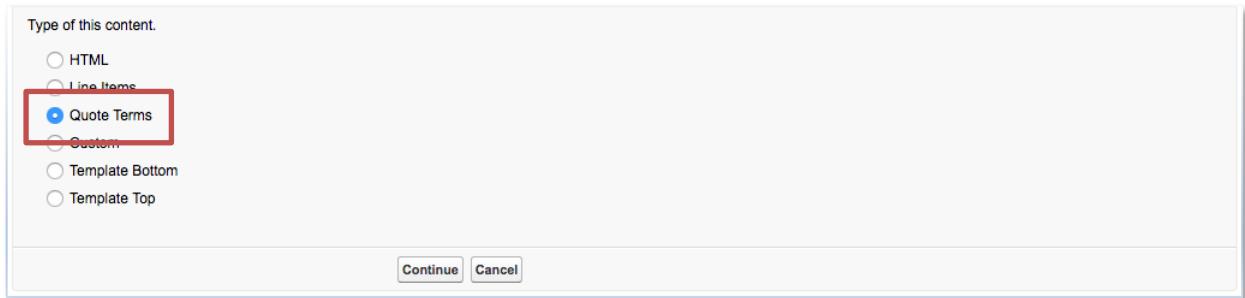
17. Update fields, then Save

The screenshot shows the configuration page for a new section named 'Combined Line Items'. The 'Template' is 'Workshop Template'. The 'Content' is 'Training Line Items'. The 'Top Margin' and 'Bottom Margin' are both set to 0.00. The 'Display Order' is 50. The 'Conditional Print Field' is set to 'Combine\_Subscription\_Type\_\_c'. The 'Group Field' is set to 'None'. The 'Print Quote Totals' checkbox is unchecked. The entire 'Section Name' input field and the 'Group Field' dropdown are highlighted with a red box.

## EX31: Quote Terms Section

Objective: Display premade quote terms on a new page in the generated proposal, beginning with premade header content, and located immediately before the signature block.

1. Navigate to the Template Content tab, then click New
2. Choose Quote Terms, then click Continue



3. Set field value, then Save



4. Navigate to the Quote Template
5. Under Sections related list, click New

6. Set field values, then click Save & New

\*Section Name  
Term Header

\*Top Margin  
0.00

Display Order  
60

Content  
Training Terms Header

\*Bottom Margin  
0.00

Page Breaks

Page Break  
Before

Keep Together  
Auto

Keep With Previous  
None

Keep With Next  
Auto

7. Set field values, then Save

\*Section Name  
Quote Terms

\*Template  
Workshop Template

\*Top Margin  
0.00

Display Order  
61

Content  
Quote Terms

\*Bottom Margin  
0.00

## EX32: Quote Term with Merge Field

Objective: Update an existing quote term to include the Quote Billing Name and Expiration Date information, inline with static text.

1. Navigate to the Quote Terms tab
2. Change List View to All
3. Click Edit next to the term beginning with “This quote is presented...”

3	QT-00...	10.00	checkbox	Dr...	Standard	This quote is presented to the customer under the condition that it remains a valid quote for o...	Edit
4	QT-00...	40.00	checkbox	Dr...	Standard	Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo mi...	Delete
5	QT-00...	30.00	checkbox	Dr...	Standard	At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium...	
6	QT-00...	20.00	checkbox	Dr...	Standard	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt...	

4. Update the term body to include the highlighted text, then Save

Body

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This quote is presented to the customer {{!quote.SBQQ\_\_BillingName\_\_c}} under the condition that it remains a valid quote for only 15 days after the stated Quote Date or until the expiration date of {{!quote.SBQQ\_\_ExpirationDate\_\_c}}, after which the quote becomes null and void.

## EX33: Conditional Quote Term

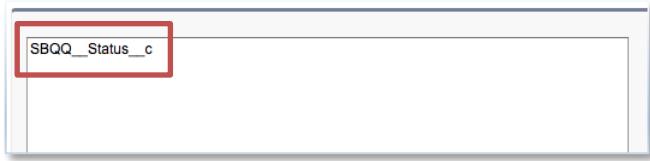
Objective: Configure a quote term so that it only appears in the generated document when the Quote field named Status is not equals to 'Approved'.

1. Navigate to the Quote Terms tab, then click New
  2. Set field values, then Save

3. In a new tab, navigate to Setup | Object Manager | Term Condition
  4. Under Fields & Relationships, click on Tested Field
  5. Click New in Values

Values	<a href="#">New</a>	<a href="#">Reorder</a>	<a href="#">Replace</a>	<a href="#">Printable View</a>	<a href="#">Chart Colors</a>	<a href="#">Values Help</a>
Action	Values	API Name	Default	Chart Colors	Modified By	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	List Amount	List Amount	<input type="checkbox"/>	Assigned dynamically	<a href="#">Admin User</a> , 7/6/2017 1:32 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Regular Amount	Regular Amount	<input type="checkbox"/>	Assigned dynamically	<a href="#">Admin User</a> , 7/6/2017 1:32 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Customer Amount	Customer Amount	<input type="checkbox"/>	Assigned dynamically	<a href="#">Admin User</a> , 7/6/2017 1:32 PM	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Net Amount	Net Amount	<input type="checkbox"/>	Assigned dynamically	<a href="#">Admin User</a> , 7/6/2017 1:32 PM	

6. Enter API name of the Quote Status field, then Save



7. Return to the original Quote Term  
8. Under the Term Conditions related list click New  
9. Set field values, then Save

A screenshot of the Salesforce Term Conditions setup screen. It shows a configuration for a term condition. The fields are arranged in a grid-like structure:

* Quote Term <small>i</small>	* Operator <small>i</small>
QT-0006	not equals
Tested Field <small>i</small>	Value <small>i</small>
SBQQ_Status__c	Approved

The fields are highlighted with red boxes: the "Tested Field" and "Value" fields are both highlighted with red boxes, while the "Operator" field has a red border around its dropdown menu.