



STUDY WITH SIMPLUS

The Complete CPQ Specialist Study Guide

Created by



Leader in Salesforce Quote-to-Cash

success simplified



STUDY WITH SIMPLUS

The Complete CPQ Specialist Study Guide
Become a Salesforce Certified CPQ Specialist

Created by



Leader in Salesforce Quote-to-Cash

success simplified

CONTENTS

Introduction	10
About the Exam	10
Why We Created This Guide	10
How to Use This Guide	11
Guide Structure	11
Recommended Training and Resources.....	12
How To Create a “CPQ Playground”	13
Create a New Developer Org	13
Install Salesforce CPQ in Your New Developer	13
PART 1: PRODUCTS AND BUNDLES	14
Objectives	15
All About Products	16
Products	16
What Are Products?	16
Product Fields	16
Price Books	23
What Are Price Books?.....	23
Price Book Fields.....	23
Price Book Entries	24
What Are Price Book Entries?	24
Price Book Entry Fields.....	24
All About Product Bundles	25
Scenario #1: Set Up Product Bundles	25
Scenario #2: Recommend Product Bundle Types.....	25

Product Features	25
What Are Product Features?	25
Product Feature Fields	25
Product Options.	27
What Are Product Options?	27
Product Option Fields	27
Option Constraints	32
Scenario #3: Set Up Option Constraints	32
What Are Option Constraints?	32
Option Constraint Fields	32
Configuration Attributes.	33
Scenario #4: Set Up Configuration Attributes	33
What Are Configuration Attributes?	33
Configuration Attribute Fields.	33
Dynamic Product Code and Description	35
Scenario #5: Dynamically Generate Product Codes and Descriptions	35
What Are Dynamic Product Codes and Descriptions	35
Product Option: Component Code and Component Code Position	35
Subscription Pricing.	35
Scenario #6: Set Up Asset and Subscription Products	35
All About Product Rules	36
Product Rules	36
Scenario #7: Create Product Rules	36
What Are Product Rules?	36
Product Rule Fields.	36
Configuration Rules.	38
What Are Configuration Rules?	38
Configuration Rule Fields	38
Lookup Queries	39

What Are Lookup Queries?	39
Lookup Query Fields	39
Error Conditions	41
What Are Error Conditions?	41
Error Condition Fields	41
Product Actions	43
What Are Product Actions?	43
Product Action Fields	43
All About Guided Selling	45
Scenario #8: Configure Guided Selling Process	45
Guided Selling Tutorial	45
Quote Process	46
What Are Quote Processes?	46
Quote Process Fields	46
Process Input	47
What Is a Process Input?	47
Process Input Fields	47
Process Input Condition	49
What Are Process Input Conditions?	49
Process Input Condition Fields	49
All About Search Filters and Custom Actions	50
Scenario #9: Set Up Search Filters	50
Search Filters	50
What Are Search Filters?	50
Search Filter Fields	50
Custom Actions	52
What Are Custom Actions?	52
Custom Action Fields	52

PART 2: QUOTE TEMPLATES	54
Objectives	55
Quote Templates	56
Scenario #10: Create Quote Templates	56
What Are Quote Templates?.....	56
Quote Template Fields.....	56
Troubleshooting Output Documents	63
Scenario #11: Troubleshoot Output Documents	63
How to Troubleshoot Output Documents	63
Quote Terms.....	63
Scenario #12: Set Up Quote Terms.....	63
What Are Quote Terms?.....	63
Quote Term Fields	63
Term Condition	65
What Are Term Conditions?	65
Term Condition Fields	65
Template Content	66
What Is Template Content?.....	66
Template Content Fields	66
Template Sections	68
Scenario #13: Set Up Template Sections	68
What Are Template Sections?.....	68
Template Section Fields.....	68
Line Columns	71
Scenario #14: Set Up Line Columns	71
What Are Line Columns?.....	71
Line Column Fields.....	71
PART 3: PRICING AND DISCOUNTS	75
Objectives	76

Pricing Method	77
Scenario #15: Determine Pricing Methods	77
List Pricing.....	77
What Is List Pricing?.....	77
Cost + Markup Pricing.....	77
What Is Cost + Markup Pricing?.....	77
Block Pricing With Optional Overage Rate.....	77
What Is Block Pricing?	77
What Is an Overage Rate?	77
Custom Pricing (Special Price).....	77
Multi-Dimensional Quoting (MDQ)	77
Contracted Prices.....	77
All About Price Rules.....	78
Price Rules.....	78
Scenario #16: Set Up Price Rules.....	78
What Are Price Rules?	78
Price Rule Fields	78
Price Conditions.....	80
What Are Price Conditions?.....	80
Price Condition Fields	80
Lookup Queries	82
What Are Lookup Queries?	82
Lookup Query Fields	82
Price Actions.....	84
What Are Price Actions?.....	84
Price Action Fields	84
All About Discount Schedules	86
Discount Schedules.....	86

STUDY WITH SIMPLUS

Scenario #17: Set Up Discount Schedules	86
What Are Discount Schedules?	86
Where Discount Schedules Are Used	86
Discount Schedule Fields	86
Discount Tiers.	89
What Are Discount Tiers?	89
Discount Tier Fields	89
All About Multi-Dimensional Quoting (MDQ)	90
Scenario #18: Create Price Dimensions	90
What Is Multi-Dimensional Quoting?	90
Watch a Multi-Dimensional Quoting tutorial	90
Price Dimension Fields.	90
Troubleshooting Calculated Prices	92
Scenario #19: Troubleshoot Calculated Prices	92
Contracted Prices.	92
Scenario #20: Configure Contracted Prices	92
What Are Contracted Prices?	92
Contracted Price Fields	92
PART 4: CPQ PLATFORM	94
Objectives	95
Troubleshoot CPQ Data Flow.	96
Scenario #21: Troubleshoot CPQ Data Flow	96
Auto-Mapping Twin Fields: Graphic	96
Auto-Mapping Twin Fields: Object Table	97
User Interface.	98
Scenario #22: Adjust User Interface	98
Data Security	98
Scenario #23: Adjust System Permissions	98

Who Sees What: Salesforce Classic	98
Who Sees What: Lightning Experience	98
Contracting Process.....	99
Scenario #24: Predict Contracting Outcome.....	99
Contracting Process Requirements	99
Troubleshoot Amendments and Renewals	99
Scenario #25: Troubleshoot Amendments and Renewals.....	99
Localization.....	99
Scenario #26: Translate User Interfaces and Outputs	99
What Is Localization?	99
Translation For Salesforce CPQ.....	99
Localization Fields	100
Example Exam Questions	101
Question #1.....	101
Question #2.....	101
Question #3.....	102
Question #4.....	102
Answers To Example Exam Questions	103
Appendix	103
Salesforce CPQ Package-Level Settings	103
Salesforce CPQ Object Relationships	103
Salesforce CPQ Product and Pricing Objects.....	103
Salesforce CPQ Transactional Objects	104

INTRODUCTION

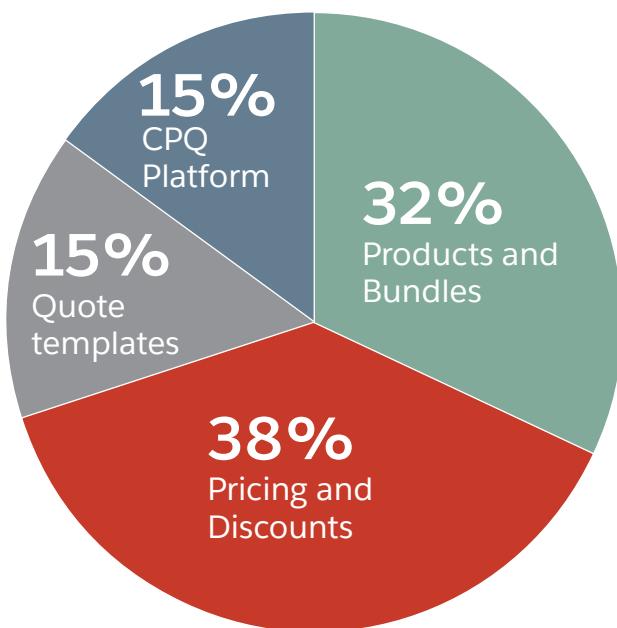
The purpose of this study guide is to help you become a [Salesforce Certified CPQ Specialist](#).

This guide is based on the business scenarios found in the [official CPQ Specialist exam guide](#), which was created by Salesforce. You will find those business scenarios throughout this guide.

ABOUT THE EXAM

The Salesforce Certified CPQ Specialist exam includes 60 multiple-choice/multiple-select questions. The exam is broken down into four sections, each with multiple business scenarios. This guide outlines the information needed to understand each of these 26 scenarios. To the right is a list of each section with the approximate weighting:

Further information regarding the exam can be found in [official CPQ Specialist exam guide](#).



WHY WE CREATED THIS GUIDE

At Simplus, we believe knowledge should be shared.

As a Certified Platinum Salesforce Partner and the leading Salesforce Quote-to-Cash partner, we know a thing or two about **Salesforce CPQ**, and we want to share some of that knowledge with you.

HOW TO USE THIS GUIDE

This study guide is designed to help you review CPQ Specialist exam objectives and key Salesforce CPQ concepts, not learn Salesforce CPQ from scratch. If you would like to attend CPQ training, please [contact our training team](#).

Salesforce recommends six to twelve months of experience of Salesforce CPQ experience before taking the exam.

Ideally, you will gain experience working on five to ten Salesforce CPQ projects. If you do not have the ability to work on Salesforce CPQ projects, we strongly suggest you practice building solutions based on real-world business scenarios in a practice org.

Simplus updates this study guide after each major release. This guide is based on the Summer '17 release of Salesforce CPQ.

GUIDE STRUCTURE

This study guide is divided into four main sections, which align with the [official CPQ Specialist exam guide](#).

Within each section, you will find business scenarios from the official exam guide along with the Salesforce CPQ topics you must understand to build solutions for each business scenario.

Following those scenarios, you will find the functionality required to solve them. We suggest using your CPQ Playground to imagine, design, and build solutions for each scenario. Taking that approach will help you learn the material more deeply than reading alone.

In general, each topic includes a summary and table of fields with help text and additional information. For example, the [Products](#) topic provides a brief definition of products, a link to learn more about products, and a table of product fields with help text and additional information about the fields in the table.

RECOMMENDED TRAINING AND RESOURCES

In addition to reviewing this guide, Simplus recommends a combination of hands-on experience, self-study, and enrollment in instructor-led training courses to prepare for the exam.

To enroll in a CPQ class, simply contact Simplus at Simplus.com/contact. Simplus instructors teach both of the official Salesforce CPQ classes offered.

SALESFORCE CPQ ADMIN ESSENTIALS FOR NEW ADMINISTRATORS (CPQ 201)

CPQ 201 is a 2-day foundational training that enables your success with Salesforce CPQ. We recommend new administrators take this course before starting a Salesforce CPQ implementation or when taking over an existing implementation.

[View syllabus](#)

SALESFORCE CPQ ADMIN ESSENTIALS FOR EXPERIENCED ADMINISTRATORS (CPQ 211)

CPQ 211 is a 4-day course is designed for 1) Administrators who will have experience implementing Salesforce CPQ solutions in a customer-facing role, and 2) Solution Architects, Implementation Consultants, and Developers seeking to understand full capabilities in order to formulate technical solutions within Salesforce CPQ.

[View syllabus](#)

HOW TO CREATE A “CPQ PLAYGROUND”

To practice concepts laid out in this study guide, we recommend you create a practice org called a “CPQ Playground.” Like Trailhead Playgrounds, creating your own CPQ Playground lets you practice building CPQ solutions in a safe environment.

Create business scenarios for each CPQ Specialist exam objective and build solutions for those scenarios in your CPQ Playground. That approach will help you understand Salesforce CPQ more deeply than simply reading and memorizing the content in this study guide.

“Try things and break stuff,” says one of our Salesforce certified instructors. “That is the best way to learn.”

To install Salesforce CPQ in a free developer org, take the following steps.

CREATE A NEW DEVELOPER ORG

1. Go to <https://developer.salesforce.com/signup>
2. Enter your information and click **Sign me up**
3. Click **Verify Account** in the email you get from Salesforce

INSTALL SALESFORCE CPQ IN YOUR NEW DEVELOPER

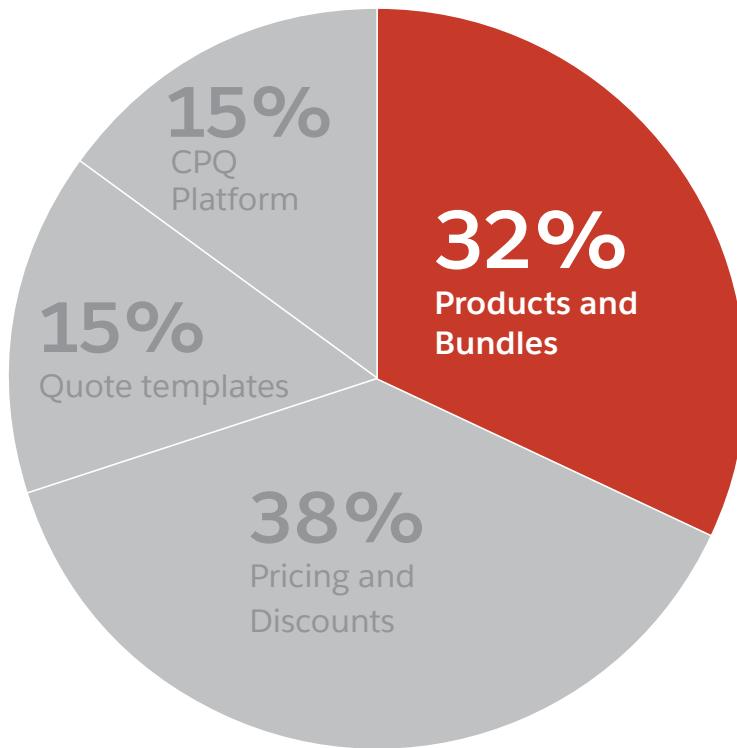
1. Go to <http://steelbrick2.force.com/Installcpq>
2. Click **Production** next to Spring ‘18
3. Select **Install for All Users**
4. Select the checkbox and click **Continue**

NOTE: Installing Salesforce CPQ can take a while. You will get an email from Salesforce with the subject “Package Salesforce CPQ Install Successful” when your installation is complete.



PART 1

PRODUCTS AND BUNDLES



OBJECTIVES

- Given a customer product catalog, set up the appropriate product bundle to meet customer needs.
- Given a customer product catalog, set up option constraints that ensures a technically viable configuration of the bundle.
- Given a customer's business logic, create applicable product rules that ensures a technically viable configuration of a bundle.
- Given a customer product catalog, identify configuration attributes that can manipulate options while ensuring a technically valid configuration.
- Given a customer product catalog, recommend the appropriate type of product bundle that meets customer needs.
- Given a customer requirement, setup products to dynamically generate product code and description.
- Given details about a customer's business, set up all necessary assets or subscription products.
- Given a customer's selling process, configure guided selling to suggest applicable products.
- Given a customer requirement, identify and setup applicable search filters to narrow large product catalogs.

ALL ABOUT PRODUCTS

PRODUCTS

What Are Products?

Products are a base catalog of all the items and services you sell and their standard prices. Price Books let you create a custom collection of products with associated List Prices for specific uses.

[Learn more about Products](#)

Product Fields

Field Label	Help Text	Additional Information
Product Name		<i>Standard Field</i>
Product Code		<i>Standard Field</i>
Product Description		<i>Standard Field</i>
Active		<i>Standard Field</i> <i>Product, Price Book, and Price Book Entry must all be active for Product to display in Product Selection screen.</i>
Product Family		<i>Standard Field</i> <i>You can add your own values to this picklist.</i>
Allocate POT on Orders	Select to base its calculations within an order on the targets.	
Asset Amendment Behavior	Select a behavior when amending assets representing this Product. By default, asset quantities cannot decrease unless an upgrade is added, and no refund is applied.	<i>Default Allow Refund</i>
Asset Conversion	Indicates how this Product is converted to asset.	<i>One per quote line</i> <i>One per unit</i>

Field Label	Help Text	Additional Information
Batch Quantity	Non-blank value designates this Product is sold in batches. Enter quantity in each batch. Quantity entered in quote will be divided by this value and rounded up to the nearest integer.	
Billing Frequency	Determines how often this Product will be invoiced.	<i>Monthly Quarterly Semiannual Annual</i>
Billing Type	The Billing Type that defines when the billing occurs. Billing in advance lets you bill your customers for Products or services before you provide them; Billing in arrears lets you bill your customers after the Products or services are provided.	<i>Advance Arrears</i>
Block Pricing Field	Field used to calculate Block Pricing.	<i>Quantity</i>
Charge Type	The type of the Product charge.	<i>One-Time Recurring Usage</i>
Component	Marks this Product as a component, excluding it from selection in Product lookup.	
Compound Discount (%)	Discount rate compounded by quantity.	
Configuration Event	Use this to control when Configure Products screen shows up for this Product. Choose "Add" to limit to initial configuration. Choose "Edit" to subsequent configuration.	<i>Always Add Edit</i> <i>Controlling Field: Configuration Type</i>
Configuration Field Set	The API name of the field set that will be used for this Product during configuration.	<i>Option Configuration</i>
Configuration Fields		

Field Label	Help Text	Additional Information
Configuration Form Title	Title of the configuration form rendered from specified configuration fields.	
Configuration Type	Configuration type of this Product: Choose Allowed if the user is allowed to configure the Product/bundle, but not required to, Disabled when your bundle automatically selects options, or Required if the Product/bundle must be configured.	<i>Required Allowed Never</i> <i>Field Dependency: Configuration Event</i>
Configuration Validator	JavaScript function used to validate configuration of this Product.	
Configured Code Pattern	Pattern used to generate Product code (SKU) for configured Products.	
Configured Description Pattern	Pattern used to generate dynamic Product description for configured Products.	
Cost Editable	Controls whether cost for this Product may be modified on individual quotes.	
Cost Schedule	Discount schedule used as a Cost Schedule with this Product.	
Custom Configuration Page		
Custom Configuration Required		
Customer Community Availability	Select how this Product should be available in Customer Communities.	<i>Only when already owned Always Never</i>
Default Pricing Table		<i>Segmented Standard</i>
Default Quantity	Specify the starting quantity of the Product when added.	

Field Label	Help Text	Additional Information
Lock Description	Flag that indicates this Product's description is locked (not editable on the quote).	
Discount Category	Specify discount category for this Product.	
Discount Schedule	Discount Schedule for use with this Product	
Percent Of Total Constraint	Use to place constraints on Dynamically Calculated Prices.	<i>List price is minimum</i> <i>List price is maximum</i>
Exclude From Percent Of Total	Check to always exclude this Product from percent of total calculations (normally non-subscription Products are included in percent of total calculations).	
Exclude From Opportunity	Indicates this Product should not be transferred to the opportunity.	
Externally Configurable	When checked, indicates that configuring this Product automatically launches the External Configuration URL, defined in Salesforce CPQ settings.	
Generate Contracted Price	Will generate a Contracted Price based on the adjusted quote line if flagged.	<i>Price</i> <i>Discount Schedule</i> <i>Do Not Generate</i>
Has Configuration Attributes		
Hidden	Excludes this Product from appearing on the quote PDF.	
Hide Price in Search Results	Select checkbox to hide this Product's price in the Product Search Results.	
Include In Percent Of Total	Check to always include this Product in percent of total calculations (normally Subscription Products are excluded from percent of total calculations).	

Field Label	Help Text	Additional Information
New Quote Group	Check to create a New Quote Group when this Product is added (unless the current group is empty).	
Non Discountable	Marks this Product as Not Discountable.	
Non Partner Discountable	Check to make this Product Non-Discounatable for partners.	
Option Layout	Determines how options are presented to users.	<i>Sections Tabs Wizard</i>
Option Selection Method	Determines how user selects options attached to this Product. "Click" method presents options with checkboxes next to them. "Add" renders a button which brings up a dialog box with available options.	<i>Click Add</i>
Optional	Select if this Product is optional by default. Optional Products don't contribute to quote total or get transferred to the opportunity.	
Price Editable	Indicates this Product allows for price to be freely editable when building a quote.	
Pricing Method Editable	Select if Pricing Method can be changed when this Product is added to quote.	
Pricing Method	Pricing method that should be applied to this Product.	<i>List Cost Block Percent of Total</i>
Product Picture Id	ID of Document or Content record that holds the picture for this Product.	
Quantity Editable	Allow or prevent changing the quantity for this Product.	

Field Label	Help Text	Additional Information
Quantity Scale	Specifies the number of decimal places used in the Quantity field.	
Disable Reconfiguration	When checked this Product can only be configured when first added to a quote. If selected, users will not have access to a Configure link on the Edit Lines page after Product has been added.	
Renewal Product	Product that replaces this Product on renewal. Use this to quote a different SKU when renewing.	
Sort Order	Determines a default sort order of Products in the Product Lookup page, and therefore the order in which they are added to the quote.	
Specifications	Formatted specifications for this Product for use in quote templates to produce spec sheets.	
Percent Of Total Base	Determines whether Percent of Total is calculated off List or Net Product prices.	<i>List Regular Customer Net</i>
Percent Of Total Category	Use this to limit percent of total calculations to certain Product categories. For example, software maintenance should only calculate percentage on Products with a software maintenance percent of total category.	<i>Hardware Software</i> <i>You can add your own values to this picklist.</i>
Subscription Conversion	Indicates how this Product is converted to Subscriptions	<i>One per subscribed asset</i>
Percent Of Total (%)	Percent of non-subscription total to be used as the price of this subscription.	
Subscription Pricing	Type of pricing to use for this subscription. "None" means this Product is not a subscription.	<i>Fixed Price Percent of Total</i>

Field Label	Help Text	Additional Information
Percent Of Total Target	Use this field to override a Product that is included in a percent of total calculation. Point this lookup to a Product with a list price you would like to use for the current Product's Percent of Total calculations.	
Subscription Term	Term length of this subscription. Only applicable if the Product is a subscription.	
Subscription Type	Renewable Subscriptions will transfer to Renewal Quotes. One-time Subscriptions will not.	<i>Renewable</i> <i>One-time</i>
Tax code	Specifies the tax code for taxation rules.	
Taxable	Indicates whether this Product is taxable.	
Term Discount Level	Specify subscription term level that should be used in calculating term discount. Leave blank to indicate default.	<i>Line</i> <i>Group</i> <i>Quote</i>
Term Discount Schedule	Schedule for discounts based on subscription term.	
Upgrade Credit	Use to specify credit when quoting upgrades to this Product.	
Upgrade Ratio	The conversion rate between this Product's quantity and that of its source Product.	
Upgrade Source	Product being upgraded. Populating this field makes this Product an upgrade.	
Upgrade Target	Specify the upgraded Product. Only applicable if this Product is an upgrade as indicated by Upgrade Source field being populated or having related Upgrade Source records.	

PRICE BOOKS

What Are Price Books?

Price Books track the prices of Products and services that your company offers to customers.

[Learn more about Price Books](#)

Price Book Fields

Field Label	Help Text	Additional Information
Price Book Name		<i>Standard Field</i>
Active		<i>Standard Field</i> <i>Product, Price Book, and Price Book Entry must all be active for Product to display in Product selection screen.</i>
Description		<i>Standard Field</i>
Is Standard Price Book		<i>Standard Field</i>

PRICE BOOK ENTRIES

What Are Price Book Entries?

Price Book entries track different types of Prices for each of your Products to fit the way you sell to different market segments and customers.

[Learn more about Price Book Entries](#)

Price Book Entry Fields

Field Label	Help Text	Additional Information
Price Book		<i>Standard Field</i>
Product		<i>Standard Field</i>
List Price		<i>Standard Field</i>
Active		<i>Standard Field</i> <i>Product, Price Book, and Price Book Entry must all be active for Product to display in Product selection screen.</i>
Use Standard Price		<i>Standard Field</i>
Product Code		<i>Standard Field</i>

ALL ABOUT PRODUCT BUNDLES

Try it out!

Scenario #1: Set Up Product Bundles

Given a customer product catalog, set up the appropriate product bundle to meet customer needs.

Scenario #2: Recommend Product Bundle Types

Given a customer product catalog, recommend the appropriate type of Product Bundle that meets customer needs.

PRODUCT FEATURES

What Are Product Features?

[Learn more about Product Features](#)

Product Feature Fields

Field Label	Help Text	Additional Information
Feature Name		<i>Standard Field</i>
Discount Schedule	Discount schedule to be applied to the Products selected by all options in this feature. This overrides discount schedule selected on the Products.	
Dynamic Option Filter Field Set	The API name of the field set that will be used when filtering dynamic options for this feature during configuration.	<i>Configurator Filter</i>
Dynamic Option Lookup Field Set	The API name of the field set that will be used when viewing dynamic options for this feature during configuration.	<i>ConfiguratorLookup</i>

Field Label	Help Text	Additional Information
Max Options	Maximum number of options for this feature that can be selected as part of the Products bundle.	
Min Options	Minimum number of options for this feature that must be part of the Products bundle.	
Number	A sequential number that determines how the features are sorted in the related list on the Products.	
Option Selection Method	Determines how user selects options attached to this Products. "Click" method presents options with checkboxes next to them. "Add" renders a button which brings up predefined options. "Dynamic" renders a button which brings up all active Productss.	<p><i>Click</i> <i>Add</i> <i>Dynamic</i></p> <p><i>"Dynamic" is used in conjunction with a Products rule when building dynamic bundles.</i></p>
Category	Assign this feature to a category such that multiple features with related options are grouped together.	<p><i>Hardware</i> <i>Software</i></p> <p><i>You can add your own values to this picklist.</i></p>
Configuration Field Set	The API name of the field set that will be used for this feature during configuration.	<i>Option Configuration</i>
Configured SKU	The Products bundle that includes this feature. If you created the feature from the Products detail page, this should already be populated.	

PRODUCT OPTIONS

What Are Product Options?

[Learn more about Product Options](#)

Product Option Fields

Field Label	Help Text	Additional Information
Option Name		<i>Standard Field</i>
Apply Immediately Context	Apply Immediately on Select applies changes immediately on selection of product, whereas Apply Immediately on Quantity Change does that on change of quantity. 'Always' applies changes both the times, on selection of product and on change of quantity.	<i>Always</i> <i>On Selection</i> <i>On Quantity Change</i>
Apply Immediately	Select the checkbox to immediately apply changes to this option. Use sparingly to avoid slow user experience.	
Bundled	Select the checkbox to indicate that the related product is bundled with the main product. Bundled options have fixed quantity and zero price as price is included in the main product. Leave this unchecked if the price should be added to the option.	
Component Code Position	Position of this component in the generated product code for the configuration.	
Component Code	Code for the component represented by this option.	
Component Description Position	Position of this component in the generated Product description for the configuration.	

Field Label	Help Text	Additional Information
Component Description	Description for the component represented by this option. This is used in conjunction with the Configured Description Pattern field on the Product object.	
Configured SKU	Product SKU of the bundle that is being configured with this option. If you create the option from the Product detail page, this should already be populated.	
Default Pricing Table	Select the pricing table this product should appear in by default when price dimensions are defined.	<i>Segmented Standard</i>
Discount (Amt)	Discount (Amt), based on the field, when the product referenced for this option is offered standalone. But, you'll need to extend a discount if purchased a part of this product bundled.	
Discount Schedule	Lookup the Discount Schedule to be applied to the product selected by this option. This Discount Schedule overrides the Discount Schedule selected on the product or feature.	
Discount (%)	Enter a Discount (%), based on the field, when the product referenced for this option is offered standalone. But, you'll need to extend a discount if purchased a part of this product bundled.	
Discounted By Package	Check to automatically apply additional discount from parent package to this component. Only percentage-based discount can be applied.	
Existing Quantity	Existing Quantity of this product. Computed by looking at the assets attached to the account.	

Field Label	Help Text	Additional Information
Feature	Enter or lookup the feature that includes this option. This will be dependent on the Configured SKU.	
Max Quantity	Maximum quantity allowed for this option.	
Min Quantity	Minimum quantity allowed for this option.	
Number	Set the display order of this option within the feature it's assigned to.	
Optional SKU	Enter or lookup the product SKU that should be added when this product is selected.	
Price Editable	Select to mark the price as editable, allowing users to make changes to option prices.	
Product Code	Product Code for the optional product SKU.	
Product Configuration Type	Pulls in the value of Configuration Type on Product object in order to avoid loading related product record.	
Product Description	Description for the optional SKU.	
Product Family	Product Family for the optional product SKU.	
Product Name	Name for the optional SKU.	
Product Quantity Scale	Specifies the number of decimal places used in the Quantity field.	
Product Subscription Pricing	Type of pricing to use for this subscription. "None" means this product is not a subscription.	
Quantity Editable	Check to allow quantity to be edited even though it's specified on the option.	

Field Label	Help Text	Additional Information
Quantity	Quantity of the related product that should be added to the quote.	
Quote Line Visibility	Configure visibility of quote line generated by this option.	<i>Always</i> <i>Editor Only</i> <i>Document Only</i> <i>Never</i>
Renewal Product Option	Product option that replaces this product option on renewal. Use this to quote a different SKU when renewing.	
Required	Select the checkbox if this product is required on the bundle.	
Selected	Select the checkbox if this product option should be automatically selected by default.	
Percent of Total Scope	Choose how this percent of total product option is calculated. Package is specific to the parent product. Components is specific to sibling components. Both is specific to the parent and sibling components.	<i>Package</i> <i>Components</i> <i>Both</i>
System	Select the checkbox to indicate this option is managed by the system which makes it unavailable for user selection.	
Type	Use "Component" if this option, including quantity, is dependent on parent. Use "Accessory" if this option is dependent on parent but quantity is independent. Use "Related Product" for related but fully independent products.	<i>Component</i> <i>Accessory</i> <i>Related Product</i>
Unit Price	Unit price for this option. This will override the value from price book.	

Field Label	Help Text	Additional Information
Uplifted By Package	Check to automatically apply uplift from parent package to this component. Only applies to components that are multi-segmented products.	
Location		

OPTION CONSTRAINTS

Try it out!

Scenario #3: Set Up Option Constraints

Given a customer product catalog, set up Option Constraints that ensures a technically viable configuration of the Bundle.

What Are Option Constraints?

[Learn more about Option Constraints](#)

Option Constraint Fields

Field Label	Help Text	Additional Information
Constraint Name		
Constrained Option	Select the option in the bundle that you want applied to this constraint.	
Active	Marks this constraint as active or inactive.	
Check Prior Purchases	Check if you want to look up prior purchases of Constraining Option within the Account.	
Configured SKU	Product SKU being constrained.	
Constraining Option	Choose an additional option if the Constrained Option is constraining another option.	
Option Constraint Group	If multiple Option Constraints target the same Constrained Option, putting the Option Constraints in the same group will require ALL Constraining Options to be selected.	
Type	Choose the behavior of this constraint: dependency means inclusion is required while exclusion means the option constraint is not selected when the constraining option is or vice versa.	<i>Dependency Exclusion</i>

CONFIGURATION ATTRIBUTES

Try it out!

Scenario #4: Set Up Configuration Attributes

Given a customer Product Catalog, identify Configuration Attributes that can manipulate options while ensuring a technically valid configuration.

What Are Configuration Attributes?

[Learn more about Configuration Attributes](#)

Configuration Attribute Fields

Field Label	Help Text	Additional Information
Attribute Name		<i>Standard Field</i>
Apply Immediately	Select the checkbox to immediately apply changes to this option. Use sparingly to avoid slow user experience.	
Apply To Product Options	Select the checkbox to apply configuration attribute selection to Product options.	
Auto-Select	Set the value of this attribute when adding a product from a Dynamic Feature using the value of the added product's matching field.	
Column Order	Columns are comprised of a picklist (of 1, 2, or 3) for each Configuration Attribute. A maximum of 3 columns is allowed.	1 2 3
Default Field	API of the target field on the default object for the default value of the attribute.	
Default Object	Target object for the default value of the attribute.	<i>Quote</i> <i>Quote Line Group</i>

Field Label	Help Text	Additional Information
Row Order	If there is no display order associated with a Configuration Attribute, order is determined by Related Content name.	
Feature	Specify the feature in which this attribute should be entered.	
Global	Indicates if this attribute has a global target field.	
Hidden Values	Enter values from the corresponding picklist field on Product Option object that you want to be hidden on this bundle.	
Hidden	If flagged as hidden, the Configuration Attribute will not appear on the Product Configurator Page.	
Position	Specify position of this attribute. Top renders above the options. Bottom renders below.	Top Bottom
Product	Specify Product on which you are creating the attribute.	
Required	Specify whether this attribute requires a value.	
Shown Values	Enter values from the corresponding picklist field on Product Option object that you want to be shown on this bundle.	
Target Field	Specify field on Product Option that will hold this attribute's value.	<i>Unit Price</i> <i>Discount (Amt)</i> <i>Discount (%)</i> <i>You can add your own values to this picklist.</i>

DYNAMIC PRODUCT CODE AND DESCRIPTION

Try it out!

Scenario #5: Dynamically Generate Product Codes and Descriptions

Given a customer requirement, set up Products to Dynamically Generate Product Code and Description.

What Are Dynamic Product Codes and Descriptions

[Learn more about Dynamic Product Codes and Descriptions](#)

Product Option: Component Code and Component Code Position

The **Component Code** and **Component Code Position** fields are located on the [Product Option Object](#)

SUBSCRIPTION PRICING

Try it out!

Scenario #6: Set Up Asset and Subscription Products

Given details about a customer's business, set up all necessary asset or subscription products.

[Learn more about Subscription Pricing](#)

ALL ABOUT PRODUCT RULES

PRODUCT RULES

Try it out!

Scenatio #7: Create Product Rules

Given a customer's business logic, create applicable Product Rules that ensures a technically viable configuration of a Bundle.

What Are Product Rules?

[Learn more about Product Rules](#)

Product Rule Fields

Field Label	Help Text	Additional Information
Product Rule Name		<i>Standard Field</i>
Active	Indicates whether this rule is active or inactive.	
Advanced Condition	Can only be entered if the Conditions Met is Custom. Enter a combination of the Error Condition Index Numbers, AND, OR, and parenthesis (e.g. (123 AND 124) AND 125).	
Conditions Met	Choose the behavior for your conditions: All is AND, Any is OR, Custom is a combination of AND/OR.	<i>All</i> <i>Any</i> <i>Custom</i>
Message	Enter a message to displayed when rule is activated. An error message will be displayed when a Validations is fired. A warning message will be displayed when an Alert is fired. Does not apply to Filter rules.	
Evaluation Event	Specify when this rule should be evaluated.	<i>Load</i> <i>Edit</i> <i>Save</i> <i>Always</i>

Field Label	Help Text	Additional Information
Evaluation Order	Specify the order of evaluation for this price rule. Higher ordered rules are evaluated last which means they "win" in case of conflict.	
Lookup Message Field	Field on Lookup Object corresponding to Product Rule Message. Field must be text.	
Lookup Object	API Name of the Custom Object that stores the lookup data.	
Lookup Product Field	Field on Lookup Object corresponding to Product Action Product Lookup. Field must be a lookup to the Product object.	
Lookup Required Field	Field on Lookup Object corresponding to Product Action Required checkbox. Field must be checkbox.	
Lookup Type Field	Field on Lookup Object corresponding to Product Action Type picklist. Field must be a Picklist or Text.	
Scope	Applies the rule to the entire quote or specific product.	<p>Product Quote</p> <p>Product evaluates product rule in Configure Products screen.</p> <p>Quote evaluates product rule in Edit Lines screen.</p>
Type	Type of rule. Validation displays error messages. Selection causes products to be added or suggested. Alert displays a warning, but requires no rectification. Filter refines option lookup results for Dynamic Bundles.	<p>Validation Selection Alert Filter</p>

CONFIGURATION RULES

What Are Configuration Rules?

[Learn more about Configuration Rules](#)

Configuration Rule Fields

Field Label	Help Text	Additional Information
Rule #		<i>Standard Field (Auto Number)</i>
Product Rule	Select the Product Rule that contains the logic to validate your product configurations.	
Active	Indicates whether this rule should be used in validating configurations.	
Parent Bundle Condition Level	Include Parent Bundle Configuration with the specified level when evaluating this rule's conditions in the configurator for alert, validation and selection rules.	1
Child Bundle Action Level	Allow Child Bundle Configurations up to the specified level to be targeted by this rule's actions when executing in the configurator for selection rules only.	1
Child Bundle Condition Level	Include Child Bundle Configurations to the specified level when evaluating this rule's conditions in the configurator for alert, validation and selection rules.	1
Product Feature	Select the Product Feature you want this rule to validate.	
Product	Select the configured Product you want this rule to validate.	
Rule Evaluation Event	Specify when this rule should be evaluated.	
Rule Type	Type of Product Rule referenced by this configuration rule.	

LOOKUP QUERIES

What Are Lookup Queries?

[Learn more about Lookup Queries](#)

Lookup Query Fields

Field Label	Help Text	Additional Information
Lookup Query #		<i>Standard Field (Auto Number)</i>
Lookup Field	API Name of the custom field used in the query.	<i>SBQQ__Category__c</i> <i>You can add your own values to this Picklist.</i>
Match Type	If Match Type = Field Value, select a Tested Object and Tested Field. If Match Type = Static Value, enter the value into Tested Value. If Match Type = Configuration Attribute, specify a Configuration Attribute.	<i>Field Value</i> <i>Static Value</i> <i>Configuration Attribute Value</i>
Operator	The operator that is applied when comparing the Field with the Value.	<i>equals</i> <i>not equals</i> <i>less than</i> <i>less or equals</i> <i>greater than</i> <i>greater or equals</i>
ParentRuleIsActive		
Price Rule	Price Rule associated with this Lookup Query. Replaces the legacy master-detail field.	
Product Rule	Product Rule associated with this Lookup Query	
Parent Rule Lookup Object		
RuleTargetsCalculator		

Field Label	Help Text	Additional Information
Tested Configuration Attribute	Configuration Attribute that is evaluated by this query. Required if Match Type = Configuration Attribute and only if this Query is associated with a Product Rule.	
Tested Field	Field on Quote, Quote Line or Product Option object that is evaluated by this query. Required if Match Type = Field Value.	<i>Product Code</i> <i>You can add your own values to this picklist.</i>
Tested Object	Object against which the query is evaluated. Required if Match Type = Field Value.	<i>Quote</i> <i>Quote Line</i> <i>Product Option</i>
Tested Value	The value you want to match in the field you selected using the operator chosen. Required if Match Type = Static Value.	

ERROR CONDITIONS

What Are Error Conditions?

[Learn more about Error Conditions](#)

Error Condition Fields

Field Label	Help Text	Additional Information
Condition #		<i>Standard Field (Auto Number)</i>
Rule	Parent rule for this condition (that runs this condition).	
Filter Type	Choose Variable to evaluate this rule against a Summary Variable; otherwise, choose Value.	<i>Variable Value</i>
Filter Value	Enter the value you want the tested variable to be evaluated against.	
Filter Variable	Choose the summary variable you want this rule to evaluate.	
Index	Assign an unique number to this Condition to reference it in the Product Rule's Advanced Condition.	
Operator	Choose the operator to use when evaluating your tested selection.	<i>equals not equals less than less or equals greater than greater or equals starts with ends with contains</i>
ParentRuleIsActive		
RuleTargetsQuote		
Tested Attribute	Used to identify the specific attribute if the Tested Field is a global Configuration Attribute field.	

Field Label	Help Text	Additional Information
Tested Field	Field on the Quote object that should be used in testing this condition.	<p><i>Group Line Items Unit Price</i></p> <p><i>You can add your own values to this picklist.</i></p>
Tested Object	Specify the object that contains the tested field.	<i>Quote Quote Line Quote Line Group Product Option Configuration Attributes Upgraded Asset</i>
Tested Variable	Select the Summary Variable you want this rule to evaluate.	

PRODUCT ACTIONS

What Are Product Actions?

[Learn more about Product Actions](#)

Product Action Fields

Field Label	Help Text	Additional Information
Product Action #		<i>Standard Field (Auto Number)</i>
Rule	Rule that runs this Product action.	
Filter Field	Choose the field to update when the rule is triggered.	<i>Product Code Product Family</i> <i>You can add your own values to this picklist.</i>
Filter Value	Enter the value to be updated in the chosen Filter Field.	
Operator	Choose the operator that determines how the Filter Field will apply to the Filter Value.	<i>equals not equals starts with contains</i>
Product	Choose the Product to be automatically selected on the quote. Note: The Product rule Type must be set to "Selection".	
Required	Select if you want the Product in the Product Lookup field to be selected on the quote.	
Type	Specify the type of action.	<i>Add Remove Enable Disable Enable & Add Disable & Remove Show Hide Show & Add Hide & Remove Default Filter Optional Filter</i>

Field Label	Help Text	Additional Information
Value Attribute	Used to identify the specific attribute if the Value Field is a global Configuration Attribute field.	
Value Field	Compares the Filter Field with this field instead of the Filter Value.	<i>Product Code</i> <i>You can add your own values to this picklist.</i>
Value Object	Select the Salesforce Object where the Value Field is defined.	<i>Quote</i> <i>Product</i> <i>Configuration Attributes</i>

ALL ABOUT GUIDED SELLING

Try it out!

Scenario #8: Configure Guided Selling Process

Given a customer's selling process, configure Guided Selling to suggest applicable Products.

GUIDED SELLING TUTORIAL

Guided Selling Introduction

Creating Product Fields

Creating Process Input Fields

Updating Process Input Fields

Creating a New Quote Process

Testing the Guided Selling Process

QUOTE PROCESS

What Are Quote Processes?

[Learn more about Quote Processes](#)

Quote Process Fields

Field Label	Help Text	Additional Information
Process Name		<i>Standard Field</i>
Default	Select the checkbox to default the quote process selector to this process in Line Editor. This only applies when quote process selector is rendered as a picklist.	
Guided Only	Select the checkbox if you want quotes covered by this process forced into guided product selection; otherwise, this defaults to ad-hoc filtering.	
Auto Select Product?	Select the checkbox to determine whether the product is auto selected if it's the only one returned by a search.	
Product Configuration Initializer	Custom Visualforce page that will be invoked on every configurable product to initialize the options.	
Product Search Executor	VisualForce page that performs custom product search.	
Sort Order	Specify the sequential number that determines the quote process's display order.	

PROCESS INPUT

What Is A Process Input?

[Learn more about Process Inputs](#)

Process Input Fields

Field Label	Help Text	Additional Information
Input Name		<i>Standard Field</i>
Quote Process	Quote process that owns the input.	
Active	Select the checkbox to activate this process input.	
Binary Choice		Yes No
Conditions Met	Indicate which Process Input conditions must be met.	All Any
Default Field	Quote field that sources default value for this input.	<i>Bill To Country</i> <i>Ship To Country</i>
Display Order	Enter the order that the process input should be displayed.	
Input Field	Select the API name for the field that accepts the user entry.	<i>BinaryChoice__c</i> <i>IntegerInput__c</i> <i>You can add your own values to this picklist.</i>
Integer Input	Enter a numerical value.	
Label	The text that you want displayed to the user in the prompt.	
Operator	Select the operator to use when comparing the Input Field entry with the Product Field.	<i>equals</i> <i>not equals</i> <i>less than</i> <i>less or equals</i> <i>greater than</i> <i>greater or equals</i> <i>starts with</i> <i>ends with</i> <i>contains</i>

Field Label	Help Text	Additional Information
Process Input Condition		
Product Field	<p>Field on Product object used in filtering products that match this input.</p>	<p><i>Product Name</i> <i>Product Code</i> <i>Product Family</i></p> <p><i>You can add your own values to this picklist.</i></p>

PROCESS INPUT CONDITION

What Are Process Input Conditions?

[Learn more about Process Input Conditions](#)

Process Input Condition Fields

Field Label	Help Text	Additional Information
Process Input Conditions Name		<i>Standard Field</i>
Process Input	Process Input that owns the condition.	
Active	Flag that indicates whether this rule is active or inactive.	
Master Process Input	Values of this process input will determine the visibility of the current input.	
Operator	Select the operator to use when comparing process input values.	<i>equals not equals less than less or equals greater than greater or equals starts with ends with contains</i>
Value	The value used to compare to the controlling process input.	

ALL ABOUT SEARCH FILTERS & CUSTOM ACTIONS

Try it out!

Scenario #9: Set Up Search Filters

Given a customer requirement, identify and set up applicable Search Filters to narrow large Product Catalogs.

SEARCH FILTERS

What Are Search Filters?

[Learn more about Search Filters](#)

Search Filter Fields

Field Label	Help Text	Additional Information
Filter Name		<i>Standard Field</i>
Action	Action to which this filter applies. Blank value means the filter is global.	
Display Order	Order in which this filter is displayed in the UI.	
Filter Source Field	Field that sources value for use in filtering.	<i>Type Status</i> <i>You can add your own values to this picklist.</i>
Filter Source Object	Object that sources value for use in filtering.	<i>Quote</i>
Filter Value	Static value used in filtering.	
Hidden Source Field	Specify the field that sources value for use in determining whether the filter is hidden.	<i>Primary</i> <i>You can add your own values to this picklist.</i>
Hidden Source Object	Specify object that sources value for use in determining whether the filter is hidden.	<i>Quote</i>

Field Label	Help Text	Additional Information
Hidden	Select the checkbox to mark this filter as hidden. Hidden filters do not display in the UI but contribute to search queries.	
Operator	Specify the operator to use with this filter.	<i>equals</i> <i>not equals</i> <i>less than</i> <i>less or equals</i> <i>greater than</i> <i>greater or equals</i> <i>starts with</i> <i>ends with</i> <i>contains</i> <i>between</i>
Target Field	Specify the field to search.	<i>Name</i> <i>Product Code</i> <i>Product Family</i> <i>Product Description</i> <i>Quantity</i> <i>Status</i> <i>You can add your own values to this picklist.</i>
Target Object	Specify object to search.	<i>Product</i> <i>Asset</i> <i>Subscription</i>

CUSTOM ACTIONS

What Are Custom Actions?

[Learn more About Custom Actions](#)

Custom Action Fields

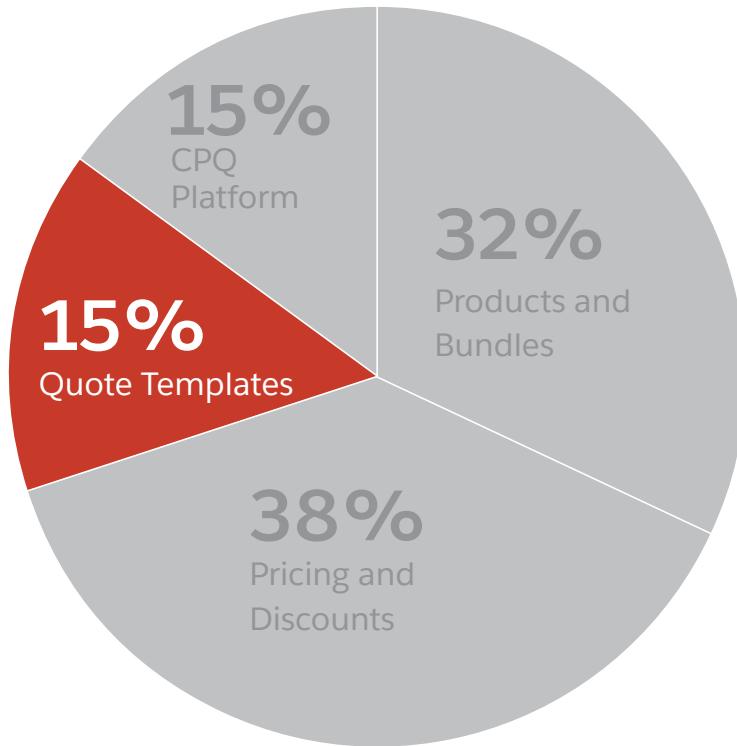
Field Label	Help Text	Additional Information
Name		<i>Standard Field</i>
Action	Action that this custom action performs.	
Active	Select the checkbox to make this action available for use.	
Brand Button	Indicates this Custom Action is a Brand Button. Affects styling of un-nested Actions only.	
Class	Css class of the custom action for easy identification on HTML.	
Conditions Met	Choose the behavior for your conditions: All is AND; Any is OR.	
Default	Select checkbox to set action as the default overriding action.	
Description	Enter the value for what you want to appear when a user hovers over the Custom Action button.	
Display Order	The order in which this action display in the UI.	
Event Handler Name	Method name for the click handler of this custom action.	
Icon Class	CSS class name for the icon of this custom action.	
Icon	Icon for this custom action	
Label	Label displayed for this action in the UI.	
Location	Location of this action on the page.	

Field Label	Help Text	Additional Information
Page Handler Name	Page name for this custom action.	
Page	The page of which to add the custom action.	
Parent Custom Action	Reference to the parent custom action that this action is grouped under.	
Return URL	URL to return to after successful execution. Not applicable to all actions.	
Target Object	Object targeted by this action.	
Type	UI element that this custom action is rendered as.	
URL Target	Method of navigating to the URL.	
URL	Specify URL to navigate to. You have access to Line, Group, and Quote record fields dependent on selected location. Examples: http://www.salesforce.com, http://www.yoursite.com/{!Id}, or /{!SBQQ__Quote__c.Name}/{!SBQQ__YourCustomVar__c}	



PART 2

QUOTE TEMPLATES



OBJECTIVES

- Given desired output requirements, create an accurate quote template based on design specifications and business rules determined by the customer.
- Given an unexpected result in the rendering of the document output, identify investigation paths to resolve issues.
- Given desired output requirements, set up appropriate quote terms and template sections to accurately produce terms in a generated document.
- Given desired output requirements, set up template sections to accurately produce in a generated document.
- Given desired output requirements, set up line item sections and Line Columns to accurately produce the items in a generated document.

QUOTE TEMPLATES

Try it out!

Scenario #10: Create Quote Templates

Given desired output requirements, create an accurate quote template based on design specifications and business rules determined by the customer.

What Are Quote Templates?

[Learn More about Quote Templates](#)

Quote Template Fields

Field Label	Help Text	Additional Information
Template Name		<i>Standard Field</i>
Show All Package Product	Select the checkbox if all package products should be printed on quote documents; otherwise, only ones that are non-zero are printed.	
Bill To Title	Title used for Bill To section. Default value is "Bill To".	
Border Color	Color of table borders expressed as a hexadecimal value.	
Bottom Margin	Bottom margin on the page.	
Show Bundled Products	Select the checkbox if quote line items with Bundled enabled are displayed on quote documents generated from this template.	
Company City	City portion of company address displayed on quote documents.	
Company Country	Country portion of company address displayed on quote documents.	
Company Email	Company email displayed on quote documents. Eg: sales@mycompany.com	
Company Fax	Company FAX displayed on quote documents.	

Field Label	Help Text	Additional Information
Company Name	Name of the company as displayed on quote documents.	
Company Phone	Company phone displayed on quote documents.	
Company Postal Code	Postal code portion of company address displayed on quote documents.	
Company Slogan	Company slogan displayed on quote documents.	
Company State	State portion of company address displayed on quote documents.	
Company Street	Street portion of company address displayed on quote documents.	
Hide Component Products	Select the checkbox if component products with the Component enabled should not be printed on quote documents.	
Customer Discount Field	Field on the Quote object that computes the customer discount.	<p><i>Total Discount (Amt)</i></p> <p><i>You can add your own values to this picklist.</i></p>
Customer Discount Label	Label used for customer discount in subtotals and totals sections.	
Show Customer Discount	Select the checkbox if you want quote-level customer discount displayed in the quote totals.	
Default	Select this checkbox to mark this template as default.	
Deployment Status	Deployment status of this template. Change to "Deployed" to make this template visible to non-admin users.	<p><i>In Development</i></p> <p><i>Deployed</i></p>
Show Discount Schedule	Choose how to display discount schedules on the quote document. Per Quote Line will show the discount schedule and Tiers right-aligned under each Quote Line.	<p><i>Per Quote Line</i></p>

Field Label	Help Text	Additional Information
Exclude Header & Footer	Excludes template header and footer for First Page, Last Page, or both the First and Last Page.	<i>First Page</i> <i>Last Page</i> <i>First and Last</i>
Exclude Page Numbers	Excludes page numbering for All Pages, First Page, Second Page, and/or both the First and Second Page.	<i>All Pages</i> <i>First Page</i> <i>Last Page</i> <i>First and Last</i>
Font Family	Family of the font that should be applied to text in this template.	<i>Courier</i> <i>Dosis</i> <i>Droid Sans</i> <i>Droid Serif</i> <i>Helvetica</i> <i>Merriweather</i> <i>Montserrat</i> <i>Noto Sans JP</i> <i>Noto Sans KR</i> <i>Noto Sans SC</i> <i>Noto Sans TC</i> <i>Open Sans</i> <i>PT Sans</i> <i>PT Serif</i> <i>Roboto</i> <i>Roboto Light</i> <i>Times</i> <i>Titillium Web</i>
Font Size	Default font size for text in this quote document.	
Footer Content	Template content that should be rendered in the footer.	
Footer Height	Height of the footer on documents generated from this template.	
Generator Name	Name of the Visualforce page that should be used by this template to generate XSL FO tree.	
Grand Total Prefix	Prefix for subtotal and total labels in grand totals.	

Field Label	Help Text	Additional Information
Group Field	Select the field that has the values you want to use when grouping and subtotaling line items.	<i>Product Family</i> <i>You can add your own values to this picklist.</i>
Group Font Family	Family of the font that should be applied to Group title text in this template.	<i>Courier</i> <i>Dosis</i> <i>Droid Sans</i> <i>Droid Serif</i> <i>Helvetica</i> <i>Merriweather</i> <i>Montserrat</i> <i>Noto Sans JP</i> <i>Noto Sans KR</i> <i>Noto Sans SC</i> <i>Noto Sans TC</i> <i>Open Sans</i> <i>PT Sans</i> <i>PT Serif</i> <i>Roboto</i> <i>Roboto Light</i> <i>Times</i> <i>Titillium Web</i>
Group Font Size	Default font size for Group titles	
Group Font Style	Font style for Group titles. Default is normal if left blank.	<i>Normal</i> <i>Bold</i> <i>Italic</i> <i>Underline</i>
Group Gap (px)	Gap between groups in pixels.	
Group Shading Color	Color of the shading for table cells that contain group title and description.	
Group Text Alignment	Specifies the alignment of Group title and Group Description. Defaults to Left if left blank.	<i>Left</i> <i>Center</i> <i>Right</i>
Group Text Color	Color for the group title and description text.	
Header Content	References template content that should be rendered in the header.	

Field Label	Help Text	Additional Information
Header Height	Height of the header on documents generated from this template.	
Hide Group Subtotals	Select the checkbox if you want to hide group subtotals on documents generated from this template.	
Introduction Title	Title of the section displayed on the Introduction field. To display no title, leave this field blank.	
Left Margin	Left margin on the page.	
Line Numbering	Specify how to number line items on generated documents. "Start at quote" numbers all lines sequentially across groups (if any). "Start at group" resets numbers within each group.	<i>Start at quote</i> <i>Start at group</i>
Line Sort Field	Specify the field used in sorting line items on the document.	<i>Number</i> <i>You can add your own values to this picklist.</i>
Logo Document Id	Salesforce ID for the document containing the logo image used in the quote PDF.	
Notes Title	Title of the section that displays the Notes field. To display no title, leave this field blank.	
Page Height	Page height in inches.	
Page Number Alignment	Specify the page number alignment for the document. Defaults to Center if the field is blank.	<i>Center</i> <i>Left</i> <i>Right</i>
Page Number Position	Specify where the page numbers are displayed in the document. Defaults to Footer if the field is blank.	<i>Footer</i> <i>Header</i>
Page Number Text	Declare the text description of the page number. "{0}" independently represents the current page. "{1}" is dependent of "{0}" and it represents the total pages with page numbers. Defaults to "Page {0} of {1}" if the field is blank.	

Field Label	Help Text	Additional Information
Page Orientation	Page orientation of PDF documents generated with this template.	<i>Portrait</i> <i>Landscape</i>
Page Width	Page width in inches.	
Partner Discount Label	Label used for partner discount in subtotals and totals sections.	
Show Partner Discount	Select the checkbox if you want quote-level partner discount displayed in the quote totals.	
Show Renewed Products	Select the checkbox if renewed products should be shown on Renewal quotes generated from this template.	
Right Margin	Right margin setting on the page.	
Roll-Up Field	Quote line field used for roll-up. All lines where this field returns the same value will be rolled up into the first line where the value occurs.	<i>Product</i> <i>You can add your own values to this picklist.</i>
Shading Color	Color of shading in column headers expressed as a hexadecimal.	
Ship To Title	Label used for "Ship To" section. Default value is "Ship To".	
Sub Group Field	Field used to sub group line items.	<i>Product Family</i> <i>You can add your own values to this picklist.</i>
Subtotal Field	Select a Field to sum and display as group/quote subtotal.	<i>List Total</i> <i>Customer Total</i> <i>Net Total</i> <i>Regular Total</i>
Subtotal Label	Enter a label for the subtotal field.	
Term Body Indent (px)	Indent in pixels of quote term body relative to the term number.	
Terms & Conditions Title	Title of the section that displays Terms & Conditions.	

Field Label	Help Text	Additional Information
Terms & Conditions	Terms & Conditions printed on every document generated with this template.	
Number Terms	Select the checkbox if the quote terms rendered by this template should be numbered.	
Text Color	Default color (in HEX) applied to text in this template.	
Top Margin	Top margin on the page.	
Total Field	Select the Field to sum and display as group/quote total.	<i>Net Total List Total Customer Total</i>
Total Label	Enter the label for the field set in Total Field.	
Hide Totals	Select the checkbox to hide quote totals on the quote document.	
Watermark ID	Salesforce ID for the document containing the watermark image used in the quote PDF.	

TROUBLESHOOTING OUTPUT DOCUMENTS

Try it out!

Scenario #11: Troubleshoot Output Documents

Given an unexpected result in the rendering of the Document Output, identify investigation paths to resolve issues.

How to Troubleshoot Output Documents

[Learn more about Troubleshooting Output Documents](#)

QUOTE TERMS

Scenario #12: Set Up Quote Terms

Given desired output requirements, set up appropriate Quote Terms and template sections to accurately produce terms in a generated document.

What Are Quote Terms?

[Learn more about Quote Terms](#)

[Learn more about creating multiple Quote Term sections](#)

Quote Term Fields

Field Label	Help Text	Additional Information
Term #		<i>Standard Field (Auto Number)</i>
Active	Indicates that this quote term is available for use.	
Advanced Condition	Can only be entered if the Conditions Met is Custom. Enter a combination of the Term Condition Index #'s, AND, OR, and parenthesis (e.g. (123 AND 124) AND 125).	
Body	Text content of this term.	
Conditions Met	Choose the behavior for your conditions: All is AND, Any is OR, Custom is a combination of AND/OR.	<i>All Any Custom</i>

Field Label	Help Text	Additional Information
Locked	Controls a Quote Term being editable by a user.	
Parent Term	Parent term for this term.	
Print Order	Specifies the order in which the terms are printed on quote document.	
Quote	Quote to which this term applies. Left blank if this is a standard term.	
Standard Term	Specifies the standard term that is being modified.	
Status	Status of this quote term.	<i>Draft In Review Approved Rejected</i>
Template Content	Template Content to which this term is applied.	
Type	Indicates if the term is standard, custom, or modified.	

TERM CONDITION

What Are Term Conditions?

[Learn more about Term Conditions](#)

Term Condition Fields

Field Label	Help Text	Additional Information
Condition #		<i>Standard Field</i>
Quote Term	Parent term for this term.	
Index	Assign an unique number to this Condition to reference it in the Quote Term's Advanced Condition.	
Operator	Choose the operator for the field.	<i>equals</i> <i>not equals</i> <i>less than</i> <i>less or equals</i> <i>greater than</i> <i>greater or equals</i> <i>starts with</i> <i>ends with</i> <i>contains</i>
Tested Field	Field on quote object used for testing this condition.	<i>List Amount</i> <i>Regular Amount</i> <i>Customer Amount</i> <i>Net Amount</i> <i>You can add your own values to this picklist.</i>
Tested Variable	Summary variable used in testing this condition.	
Value	Value to test against.	

TEMPLATE CONTENT

What Is Template Content?

[Learn more about Template Content](#)

NOTE: Template Top and Template Top Template Content looks like HTML Template Content. However, you should convert Template Top and Template Bottom Template Content into HTML Template Content if you intent to translate your Template Content into another language.

[Learn more about Custom Template Content](#)

NOTE: Custom Template Content is not tested on the CPQ Specialist exam.

Template Content Fields

Field Label	Help Text	Additional Information
Content Name		<i>Standard Field</i>
Custom Source	URL to a VisualForce page that generates content when type is set to "Custom".	
Font Family	Font family to use when rendering this content in the generated PDF quote document.	<i>Courier</i> <i>Dosis</i> <i>Droid Sans</i> <i>Droid Serif</i> <i>Helvetica</i> <i>Merriweather</i> <i>Montserrat</i> <i>Noto Sans JP</i> <i>Noto Sans KR</i> <i>Noto Sans SC</i> <i>Noto Sans TC</i> <i>Open Sans</i> <i>PT Sans</i> <i>PT Serif</i> <i>Roboto</i> <i>Roboto Light</i> <i>Times</i> <i>Titillium Web</i>
Font Size	Font size to use when rendering this content on the generated PDF quote document.	

Field Label	Help Text	Additional Information
Markup	Contains the markup if this content is of type "Markup".	
Raw Markup	Original HTML version of the content in the Markup field.	
Table Style	Style of the table used for line items. Standard (default) = user-defined fields as columns with line items listed vertically.	<i>Standard</i> <i>Price Dimensions as Columns</i> <i>Price Dimensions as Rows with Summary</i>
Text Color	Default color (in HEX) applied to text rendered by this content.	
Type	Type of this content.	<i>HTML</i> <i>Line Items</i> <i>Quote Terms</i> <i>Custom</i>

TEMPLATE SECTIONS

Try it out!

Scenario #13: Set Up Template Sections

Given desired output requirements, set up Template Sections to accurately produce in a generated document.

What Are Template Sections?

[Learn more about Template Sections](#)

Template Section Fields

Field Label	Help Text	Additional Information
Section Name		<i>Standard Field</i>
Template	Quote template that uses this template section.	
Border Color	Color of table borders expressed as a hexadecimal value.	
Bottom Margin	Margin left at the bottom of this section.	
Hide Column Header	Select the checkbox to hide the column header. Only applies to sections pointing to template content of type "Line Items".	
Conditional Print Field	Field on quote object that controls whether this section prints on generated PDF documents.	<i>Group Line Items Primary</i> <i>You can add your own values to this picklist.</i>
Content	Select the template content to display in this template section.	
Display Order	Specify the order (top down) in which this section is rendered relative to other sections on the template.	

Field Label	Help Text	Additional Information
Filter Field	Field used to filter records rendered by this section.	<p><i>Optional</i></p> <p><i>You can add your own values to this picklist.</i></p>
Filter Operator	Operator used for filtering records rendered by this section.	<i>equals</i> <i>not equals</i> <i>less than</i> <i>less or equals</i> <i>greater than</i> <i>greater or equals</i> <i>starts with</i> <i>ends with</i> <i>contains</i>
Filter Value	Value used in filtering records rendered by this section.	
Group Field	Specify field used in grouping lines rendered by this section. Only applicable to Line Items section.	<i>Product Family</i> <i>Subscription Category</i> <i>You can add your own values to this picklist.</i>
Keep Together	Specifies whether an attempt should be made to keep contents together on the same page.	<i>Always</i> <i>Auto</i>
Keep With Next	Specifies whether an attempt should be made to keep contents together on the same page with next block of content.	<i>Always</i> <i>Auto</i>
Keep With Previous	Specifies whether an attempt should be made to keep contents together on the same page with previous block of content.	<i>Always</i> <i>Auto</i>
Page Break	Specifies whether page break should be inserted before, after or both before/after this content.	<i>Before</i> <i>After</i> <i>Both</i>
Print Quote Totals	Select the checkbox to print quote totals after this section. Only applicable to Line Items sections.	

Field Label	Help Text	Additional Information
Roll-Up Field	Quote line field used for roll-up. All lines where this field returns the same value will be rolled up into the first line where the value occurs.	<i>Product</i> <i>You can add your own values to this picklist.</i>
Summary Display	Choose "Always" to display subtotal, discounts and grand total regardless of any other settings. Choose "Never" to never display regardless of other settings. Leaving this field blank will render summary as defined by template fields.	<i>Always</i> <i>Never</i>
Top Margin	Margin left at the top of this section.	

LINE COLUMNS

Try it out!

Scenario #14: Set Up Line Columns

Given desired output requirements, set up line item sections and Line Columns to accurately produce the items in a generated document.

What Are Line Columns?

[Learn more about Line Columns](#)

Line Column Fields

Field Label	Help Text	Additional Information
Column Heading		<i>Standard Field</i>
Template	Template on which this field is to be displayed.	
Alignment	Determines how the column label and values are aligned.	<i>Left Center Right</i>
Bottom Margin (px)	The amount of space in pixels between bottom border and content.	
Column Heading Field	The field that sources the dynamic heading for this column.	<i>Type</i>
Conditional Print Field	Field on quote object that controls whether this column prints on generated PDF document.	<i>Group Line Items</i> <i>You can add your own values to this picklist.</i>
Display Order	Order in which the column hosting this field is displayed.	
Dynamic Number Scale	The decimal scale for numbers in the column are set based on the largest precision in the column.	
Field Name	API name for the field on the Quote Line object you want displayed in this column.	

Field Label	Help Text	Additional Information
Font Family	Select font family to apply to this column. Leaving blank inherits form the template.	<i>Courier</i> <i>Dosis</i> <i>Droid Sans</i> <i>Droid Serif</i> <i>Helvetica</i> <i>Merriweather</i> <i>Montserrat</i> <i>Noto Sans JP</i> <i>Noto Sans KR</i> <i>Noto Sans SC</i> <i>Noto Sans TC</i> <i>Open Sans</i> <i>PT Sans</i> <i>PT Serif</i> <i>Roboto</i> <i>Roboto Light</i> <i>Times</i> <i>Titillium Web</i>
Font Size (pt)	Specify font size (in points) for text in this column. Leaving black inherits from the template.	
Font Weight	Specify font weight for text in this column. Leaving blank defaults to "Normal".	<i>Normal</i> <i>Heavy</i>
Heading Text Color	Specify color (in Hex) for text in the heading of this column. Leaving blank inherits from text color for this column.	
Hide On Product Options	Hides value in this column if line item is a Product Option.	
Left Margin (px)	Amount of space in pixels between left border and content.	
Right Margin (px)	Amount of space in pixels between right border and content.	
Roll Up	Indicates whether this field should be rolled up into master line. Only applicable if Roll-Up Field is specified on the template.	

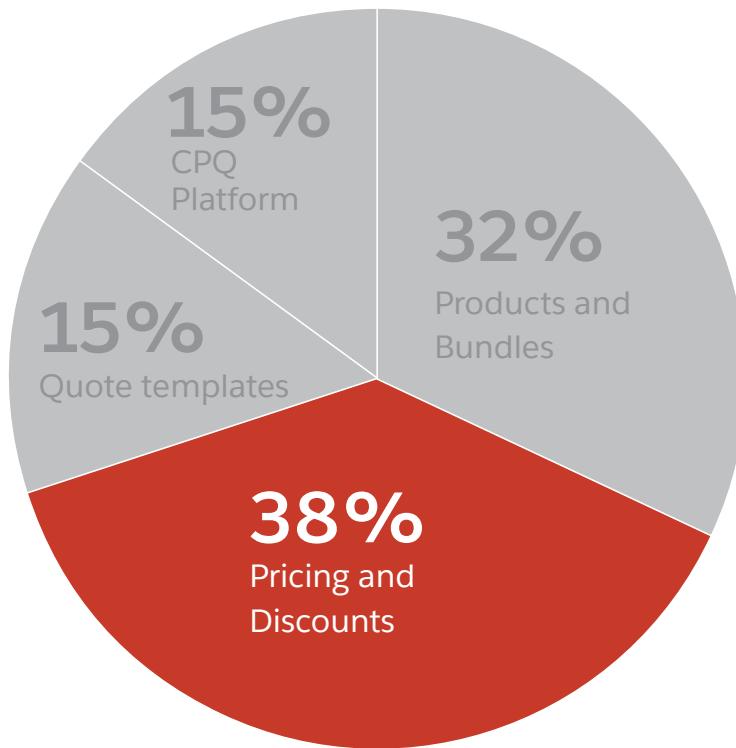
Field Label	Help Text	Additional Information
Section	Section to which this line column applies. No section means the column applies to all sections.	
Separate Line	Select the checkbox in order for this field to be printed on its own line. Use for long text fields such as product description.	
Sub Group Summary Label	Summary label for sub Group level.	
Summary Font Weight	Specify font weight for text in the summary row for this column Leaving blank defaults to font weight for the column overall.	<i>Normal Heavy</i>
Summary Function	Function used to summarize values in this column.	SUM
Summary Label	Label output for this column in the summary row.	
Summary Level	Set the level on which this column should be summarized.	<i>All Sub Group</i>
Summary Shading Color	Specify color (in Hex) for cell background in the summary row for this column. Leaving blank inherits shading color for the template.	
Summary Text Color	Specify color (in Hex) for text in the summary row for this column. Leaving blank inherits from text color for this column.	
Text Color	Specify color (in Hex) for text in this column. Leaving blank inherits from the template.	
Top Margin (px)	Amount of space in pixels between top border and content.	

Field Label	Help Text	Additional Information
Discard Width When Hidden	Select the checkbox for conditionally displayed column to replace another column(s). Leaving this box unselected will re-allocate width of this column when it's hidden to another column therefore keeping table width unchanged.	
Width	Width (percentage) of the column taken up by this field.	



PART 3

PRICING AND DISCOUNTS



OBJECTIVES

- Given a customer's pricing model for a product, determine the appropriate pricing method.
- Given a price waterfall, set up price rules that will meet customer needs.
- Given a customer's tiered pricing model, determine the appropriate characteristics of volume-based or term-based discount schedules.
- Given a customer's products, ramping, and escalator requirements, create appropriate price dimensions.
- Given unexpected calculated prices, determine investigation paths that will produce accurate pricing.
- Given a customer-specific pricing requirement, configure correct contracted prices.

PRICING METHOD

Try it out!

SCENARIO #15: DETERMINE PRICING METHODS

Given a customer's pricing model for a Product, determine the appropriate pricing method.

LIST PRICING

What Is List Pricing?

[Learn more about List Pricing](#)

COST + MARKUP PRICING

What Is Cost + Markup Pricing?

[Learn more about Cost + Markup Pricing](#)

BLOCK PRICING WITH OPTIONAL OVERAGE RATE

What Is Block Pricing?

[Learn more about Block Pricing](#)

What Is an Overage Rate?

[Learn more about Overage Rates](#)

CUSTOM PRICING (SPECIAL PRICE)

[See Price Rules](#)

MULTI-DIMENSIONAL QUOTING (MDQ)

[See Multi-Dimensional Quoting](#)

CONTRACTED PRICES

[See Contracted Prices](#)

ALL ABOUT PRICE RULES

PRICE RULES

Try it out!

Scenario #16: Set Up Price Rules

Given a price waterfall, set up Price Rules that will meet customer needs.

What Are Price Rules?

[Learn more about Price Rules](#)

Price Rule Fields

Field Label	Help Text	Additional Information
Price Rule Name		<i>Standard Field</i>
Active	Indicates whether this rule is active or not.	
Advanced Condition	Can only be entered if the Conditions Met is Custom. Enter a combination of the Price Condition Index #'s, AND, OR, and parenthesis (e.g. (123 AND 124) AND 125).	
Conditions Met	Choose the behavior for your conditions: All is AND, Any is OR, Custom is a combination of AND/OR.	<i>All</i> <i>Any</i> <i>Custom</i>
Configurator Evaluation Event	When None or Save is selected, the Configurator scoped price rules will fire on save. When Edit is selected, the Configurator scoped price rules will fire on edit and save.	<i>Save</i> <i>Edit</i>
Calculator Evaluation Event	Specify when this rule should be evaluated. Only to be used when targeting Quote Line and not supported on legacy calculator.	<i>On Initialization</i> <i>Before Calculate</i> <i>On Calculate</i> <i>After Calculate</i>

Field Label	Help Text	Additional Information
Evaluation Order	Specify the order of evaluation for this price rule. Higher ordered rules are evaluated last which means they "win" in case of conflict.	
Lookup Object	API Name of the Custom Object that stores the lookup data.	<p><i>SBQQ__LookupData__c</i></p> <p><i>You can add your own values to this picklist.</i></p>
Product	Choose a product to associate to this rule.	
Evaluation Scope	Event during which this rule is evaluated.	<p>Calculator Configurator</p> <p>Calculator evaluates price rule when calculation is triggered:</p> <ul style="list-style-type: none"> • User clicks Calculate, Quick Save, or Save • User adds or removes products • User edits field in Calculating Fields field set • User edits field on quote line record <p>Configurator evaluates price rules during product configuration.</p>

PRICE CONDITIONS

What Are Price Conditions?

[Learn more about Price Conditions](#)

Price Condition Fields

Field Label	Help Text	Additional Information
Condition #		<i>Standard Field (Auto Number)</i>
Price Rule	Price rule running this condition.	
Field	Choose the field that should contain the value you enter in the Value field.	<i>Product Code</i> <i>You can add your own values to this picklist.</i>
Filter Formula	Enter a formula with operators, functions, and available fields on quote and target object. Not supported on legacy calculator.	
Filter Type	Choose Variable to evaluate this condition against a Summary Variable; otherwise, choose Value.	<i>Value Variable Formula</i>
Filter Variable	Select the Summary Variable you want this condition to use as a filter.	
Index	Assign an unique number to this Condition to reference it in the Price Rule's Advanced Condition.	
Object	Object against which the condition is evaluated.	<i>Quote Quote Line Product Option Summary Variable</i>

Field Label	Help Text	Additional Information
Operator	Select the operator to apply when comparing the Field with the Value.	<i>equals</i> <i>not equals</i> <i>less than</i> <i>less or equals</i> <i>greater than</i> <i>greater or equals</i> <i>starts with</i> <i>ends with</i> <i>contains</i> <i>ParentRuleIsActive</i> <i>RuleTargetsCalculator</i>
Tested Formula	Enter a formula with operators, functions, and available fields on quote and target object. Not supported on legacy calculator.	
Tested Variable	Summary variable tested by this price condition.	
Filter Value	Enter the value you want to match in the field you selected using the operator chosen.	

LOOKUP QUERIES

What Are Lookup Queries?

[Learn more about Lookup Queries](#)

Lookup Query Fields

Field Label	Help Text	Additional Information
Lookup Query #		<i>Standard Field (Auto Number)</i>
Lookup Field	API Name of the custom field used in the query.	<i>SBQQ__Category__c</i> <i>You can add your own values to this picklist.</i>
Match Type	If Match Type = Field Value, select a Tested Object and Tested Field. If Match Type = Static Value, enter the value into Tested Value. If Match Type = Configuration Attribute, specify a Configuration Attribute.	<i>Field Value</i> <i>Static Value</i> <i>Configuration Attribute Value</i>
Operator	The operator that is applied when comparing the Field with the Value.	
ParentRuleIsActive		
Price Rule	Price Rule associated with this Lookup Query. Replaces the legacy master-detail field.	
Product Rule	Product Rule associated with this Lookup Query	
Parent Rule Lookup Object		
RuleTargetsCalculator		
Tested Configuration Attribute	Configuration Attribute that is evaluated by this query. Required if Match Type = Configuration Attribute and only if this Query is associated with a Product Rule.	

Field Label	Help Text	Additional Information
Tested Field	Field on Quote, Quote Line or Product Option object that is evaluated by this query. Required if Match Type = Field Value.	<i>Product Code</i> <i>You can add your own values to this picklist.</i>
Tested Object	Object against which the query is evaluated. Required if Match Type = Field Value.	<i>Quote</i> <i>Quote Line</i> <i>Product Option</i>
Tested Value	The value you want to match in the field you selected using the operator chosen. Required if Match Type = Static Value.	

PRICE ACTIONS

What Are Price Actions?

[Learn more about Price Actions](#)

Price Action Fields

Field Label	Help Text	Additional Information
Action #		<i>Standard Field (Auto Number)</i>
Rule	Price rule running this action.	
Target Field	Select the field you want updated when the conditions are met.	<i>Unit Price</i> <i>Discount (%)</i> <i>Discount (Amt)</i> <i>Markup (%)</i> <i>Markup (Amt)</i> <i>You can add your own values to this picklist.</i>
Formula	Enter a formula with operators, functions, and available fields on quote and target object. Not supported on legacy calculator.	
Order	Number which determines the order in which multiple actions on a rule are executed.	
ParentRuleIsActive		
Rule Lookup Object		
RuleTargetsCalculator		
Source Lookup Field	API Name of the field to return from the row matching the condition.	<i>SBQQ__Value__c</i> <i>You can add your own values to this picklist.</i>
Source Variable	Summary variable that sources value for this action.	

Field Label	Help Text	Additional Information
Target Object	Select the object on which the field is defined	<i>Quote Quote Line Product Option</i>
Source Field	If the value you want inserted is calculated in another Quote Line field, select the field here.	
Value	Enter the value you want inserted into the Target Field when conditions are met.	

ALL ABOUT DISCOUNT SCHEDULES

DISCOUNT SCHEDULES

Try it out!

Scenario #17: Set Up Discount Schedules

Given a customer's tiered pricing model, determine the appropriate characteristics of Volume-Based or Term-Based Discount Schedules.

What Are Discount Schedules?

[Learn more about Discount Schedules](#)

Where Discount Schedules Are Used

1. Product: Discount Schedule
2. Product: Term Discount Schedule
3. Feature: Discount Schedule
4. Option: Discount Schedule
5. Price Dimension: Discount Schedule
6. Contracted Price: Discount Schedule

Discount Schedule Fields

Field Label	Help Text	Additional Information
Schedule Name		<i>Standard Field</i>
Account	Account that this discount schedule applies to. Only used in combination with Discount Schedule Override on Quote Line Editor UI.	
Aggregation Scope	Specify how to aggregate quantities of quote lines for products using this schedule. By default quantity of each line (even for the same product) is considered independently.	<i>Quote Group</i>
Constraint Field	Select the field that you want to match against the same field on the quote.	<i>Account__c</i>

Field Label	Help Text	Additional Information
Cross Orders	Select the checkbox if you want to extend volume discounts on total volume owned by customer (i.e. quantity quoted plus prior purchases).	
Cross Products	Select the checkbox to aggregate quantities of all products using this schedule for the purpose of volume discount calculation. Slab discounts cannot be used for Cross Product discounts.	
Description	Description for this Discount Schedule.	
Discount Unit	Specify the Discount Unit: Amount or Percent.	<i>Percent Amount Price</i>
Excluded Pricebook IDs	Enter a list of price book IDs separated by commas that should not be applied to this discount schedule.	
Include Bundled Quantities	If checked, the Quantities of Bundled Product Options will be included in the Aggregation Scope	
Order Product	Order product that this discount schedule applies to.	
Order	Order that this discount schedule applies to.	
Original Discount Schedule	The original Discount Schedule that was overridden to create this Discount Schedule.	
Override Behavior	Determines if the current Discount Tier that the product falls within is editable, if all Discount Tiers are editable, or none.	<i>All Current Tier Only</i>
Price Scale	Decimal places for prices produced by this discount schedule.	
Price Book	Price book that this discount schedule applies to. Only used in combination with Product lookup to assign product/price book specific schedule.	

Field Label	Help Text	Additional Information
Product	Product that this discount schedule applies to. Only used in combination with Price Book lookup to assign product/price book specific schedule.	
Quote Line Quantity Field	Field used to calculate discount schedule pricing.	<p><i>Quantity</i></p> <p><i>You can add your own values to this picklist.</i></p>
Quote Line	Quote Line that this discount schedule applies to. Only used in combination with Discount Schedule Override on Quote Line Editor UI.	
Quote	Quote that this discount schedule applies to. Only used in combination with Discount Schedule Override on Quote Line Editor UI.	
Type	Choose the type of discount that determines how the amount or percentages will be subtracted from price.	<p><i>Range Slab</i></p>
Use Price For Amount	If checked, the user defined Discount Schedule's Discount Unit will be set to Price.	
User Defined	Identifies whether this schedule was created by an end user or an admin.	

DISCOUNT TIERS

What Are Discount Tiers?

[Learn more about Discount Tiers](#)

Discount Tier Fields

Field Label	Help Text	Additional Information
Tier Name		<i>Standard Field</i>
Schedule	Discount Schedule to which this tier belongs.	
Discount ({0})	Discount amount applied when quantity falls in this tier.	
Discount (%)	Discount percentage applied when quantity falls in this tier.	
Lower Bound	Lower bound of the quantity range for this tier.	
Number	Number indicating this tier's position within the schedule.	
Price	The actual price of this discount tier. This field will be populated when a new set of discount schedules are created for a new Order record.	
Upper Bound	Upper bound of the quantity range for this tier.	

ALL ABOUT MULTI-DIMENSIONAL QUOTING (MDQ)

Try it out!

Scenario #18: Create Price Dimensions

Given a customer's Products, ramping, and escalator requirements, create appropriate Price Dimensions.

What Is Multi-Dimensional Quoting?

[Learn more about Multi-Dimensional Quoting](#)

Watch a Multi-Dimensional Quoting Tutorial

1. [Introduction to Multi-Dimensional Quoting](#)
2. [Time-Based Dimensions](#)
3. [Non-Standard Term Lengths](#)
4. [One-Time Dimensions](#)
5. [Amendments and Renewals](#)
6. [Discount Schedules and Block Prices](#)
7. [Output Document](#)

Download a transcript of the Multi-Dimensional Quoting tutorial [here](#).

Price Dimension Fields

Field Label	Help Text	Additional Information
Dimension Name		<i>Standard Field</i>
Cost Editable	Controls whether cost for this product may be modified on individual quotes.	<i>Inherit</i> Yes No
Default Quantity	Specify the starting quantity of the product when added.	
Discount Schedule	Discount schedule for use with this dimension	

Field Label	Help Text	Additional Information
Non Discountable	Marks this dimension as not discountable.	<i>Inherit</i> Yes No
Non Partner Discountable	Marks this dimension as non-discountable for partners.	<i>Inherit</i> Yes No
Price Book	Associates this dimension to a particular Price Book	
Price Editable	Indicates this dimension allows for price to be freely editable when building a quote.	<i>Inherit</i> Yes No
Product	Select a Product to associate this Price Dimension with.	
Quantity Editable	Allow or prevent changing the quantity for this dimension.	<i>Inherit</i> Yes No
Quantity Scale	Specifies the number of decimal places used in the Quantity field.	
Taxable	Indicates whether this product is taxable.	<i>Inherit</i> Yes No
Term Discount Schedule	This is a schedule for discounts based on Subscription Term. Values entered into these fields will override the values entered at the Product level.	
Type	Select the type of Price Dimension: One-Time or Yearly. Yearly Dimensions are always treated as Subscriptions.	<i>Year</i> <i>Quarter</i> <i>Month</i> <i>Custom</i> <i>One-time</i>
Unit Price	Unit price for this Dimension. This will override the value from the Price Book.	

TROUBLESHOOTING CALCULATED PRICES

Try it out!

Scenario #19: Troubleshoot Calculated Prices

Given unexpected calculated prices, determine investigation paths that will produce accurate pricing.

CONTRACTED PRICES

Scenario #20: Configure Contracted Prices

Given a customer-specific pricing requirement, configure correct Contracted Prices.

What Are Contracted Prices?

[Learn more about Contracted Prices](#)

Contracted Price Fields

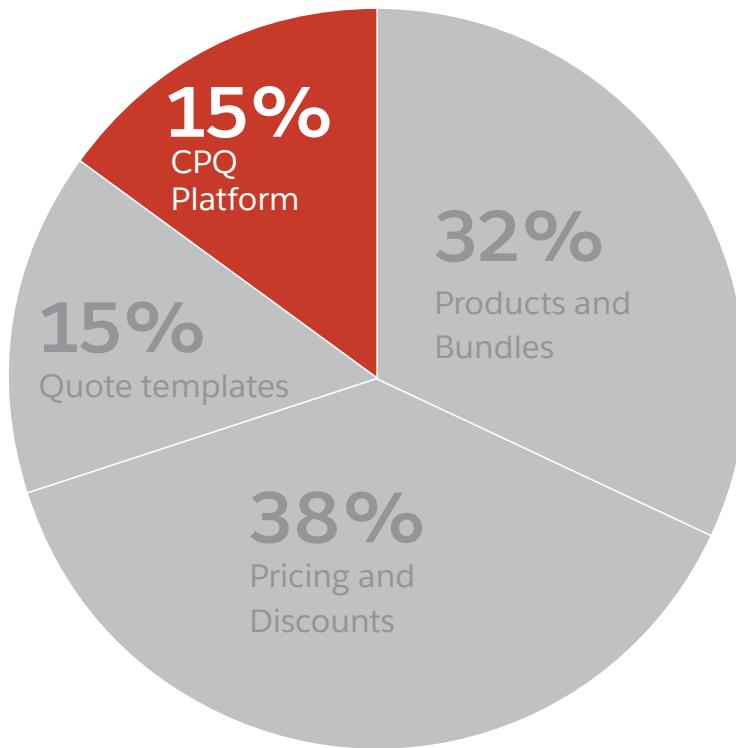
Field Label	Help Text	Additional Information
Contracted Price Number		<i>Standard Field (Auto Number)</i>
Account	Account for which this price was negotiated.	
Contract	Sales contract that governs this price.	
Description	Description for this Contracted Price. This will be copied into "Special Price Description" of Quote line items using this price.	
Discount Schedule	Volume discount schedule to use for this product with this customer.	
Discount	Discount off the Price Book price (percent) represented by this Contracted Price. Either this field or Price should be set but not both.	
Effective Date	Date this contracted price becomes effective.	
Expiration Date	Date this contracted price expires.	

Field Label	Help Text	Additional Information
Filter Field	Select a field to use in a filter, such as Product Family, if you want to apply this price to a set of products. If you are using a custom field, add the API name to the Filter Field as a picklist value.	<i>Product Product Code Product Family</i> <i>You can add your own values to this picklist.</i>
Filter Value	Value the filter field is tested against to determine if this contracted price should apply.	
Non Discountable	Select the checkbox to disallow further discounting of this product.	
Operator	Select the operate to use when matching the contents of the Filter Field with the Filter Value.	<i>equals not equals less than less or equals greater than greater or equals ends with contains</i>
Original Quote Line	The Quote Line that originated this Contracted Price.	
Price	Enter the price that has been negotiated with the customer. This value will override any other price such as the one from a price book or a volume-discounted price.	
Product	Select a product from any price book that you want to apply to this discount.	



PART 4

CPQ PLATFORM



OBJECTIVES

- Given an unexpected result in the CPQ data flow, determine investigations paths that will resolve the issue.
- Given a set of business requirements, adjust the User Interface to display the appropriate data.
- Given a set of business requirements, adjust permissions to ensure appropriate data security.
- Given a finalized quote, accurately predict the outcome of the contracting process.
- Given an unexpected result in the amendment / renewal data flow, determine investigations paths that will resolve the issue.
- Given a set of translated values, use the appropriate localization mechanism to ensure translated user interfaces and outputs.

TROUBLESHOOT CPQ DATA FLOW

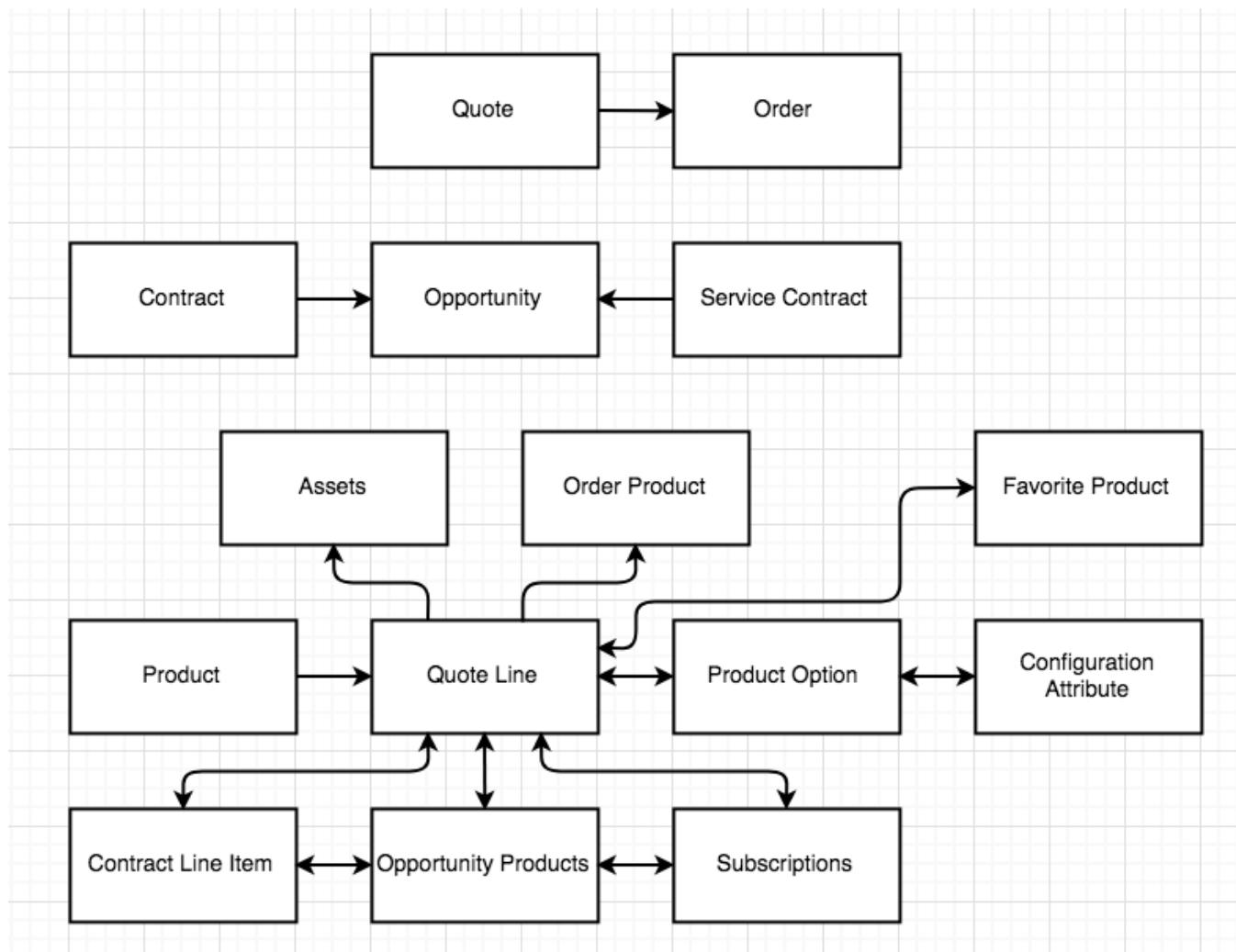
Try it out!

Scenario #21: Troubleshoot CPQ Data Flow

Given an unexpected result in the CPQ data flow, determine investigations paths that will resolve the issue.

[Learn more about Auto-Mapping Twin Fields](#)

Auto-Mapping Twin Fields: Graphic



Auto-Mapping Twin Fields: Object Table

From	To
Contract	Opportunity
Contract	Renewal Opportunity
Service Contract	Opportunity
Service Contract	Renewal Opportunity
Opportunity Products	Quote Line (applies only to standalone products when opportunity products exist before first primary quote is created)
Product	Quote Line
Product Option (Configuration Attribute)	Quote Line
Product Option (Editable Custom Fields)	Quote Line
Quote Line	Product Option (Configuration Attribute)
Quote Line	Product Option (Editable Custom Fields)
Quote	Order
Quote Line	Order Product
Quote Line	Favorite Product
Favorite Product	Newly-Added Favorite Quote Line
Quote Line	Opportunity Product
Quote Line	Subscription
Quote Line	Asset
Quote Line	Contract Line Item
Subscription	Renewal Opportunity Product/Quote Line and Amended Opportunity Product/Quote Line
Contract Line Item	Renewal Opportunity Product/Quote Line and Amended Opportunity Product/Quote Line

USER INTERFACE

Try it out!

Scenario #22: Adjust User Interface

Given a set of business requirements, adjust the User Interface to display the appropriate data.

[Learn more about adjusting the User Interface](#)

DATA SECURITY

Scenario #23: Adjust System Permissions

Given a set of business requirements, adjust permissions to ensure appropriate data security.

Who Sees What: Salesforce Classic

1. Overview
2. Organization Access
3. Object Access
4. Organization-Wide Defaults
5. Record Access Via Roles
6. Record Access Via Sharing Rules
7. Field Level Security
8. User Sharing
9. Permission Sets
10. Record Types

Who Sees What: Lightning Experience

1. Overview
2. Organization Access
3. Object Access
4. Organization-Wide Defaults
5. Record Access Via Roles
6. Field Level Security
7. Record Access Via Sharing Rules
8. Record Types
9. Permission Sets

CONTRACTING PROCESS

Try it out!

Scenario #24: Predict Contracting Outcome

Given a finalized quote, accurately predict the outcome of the contracting process.

Contracting Process Requirements

1. **Account** populated on opportunity
2. **Account** and **Opportunity** populated on quote
3. **Primary** quote selected
4. **Start Date** populated on quote
5. **Subscription Term** or **End Date** populated on quote
6. **Subscription products** exist on quote
7. **Contracted** checkbox on opportunity is TRUE

TROUBLESHOOT AMENDMENTS AND RENEWALS

Scenario #25: Troubleshoot Amendments and Renewals

Given an unexpected result in the Amendment / Renewal Data Flow, determine investigations paths that will resolve the issue.

LOCALIZATION

Scenario #26: Translate User Interfaces and Outputs

Given a set of translated values, use the appropriate localization mechanism to ensure translated User Interfaces and Outputs.

What is Localization?

[Learn more about Localization](#)

Translation For Salesforce CPQ

Translating product and bundle fields

Translating template content

Translating quote templates

Upload translations with Salesforce Data Loader

Download localization data migration workbook

Localization Fields

Field Label	Help Text	Additional Information
Localization Number		Standard Field (Auto Number)
API Name	The API Name of this content.	
Description	To describe where the text is located	
Label	This action's label in the UI.	
Language	The language code for this translation.	
Line Column	The line column related to this content.	
Long Text Area	This field stores translations for Long Text fields.	
Price Dimension	The Dimension related to this content.	
Product Feature	The product feature related to this content.	
Product Option	The product option that generated this line.	
Product	The product related to this content.	
Quote Template	The template to use for this content.	
Quote Term	The parent term for this term.	
Rich Text Area	This field stores translations for Rich Text fields.	
Template Content	The template content to use for this content.	
Text Area	This field stores translations for Text Area fields.	
Text	This field stores translations for Text fields.	
User Defined	To indicate whether this field is user-defined or not.	

EXAMPLE EXAM QUESTIONS

The following example questions (and their answers) can be found in the [official CPQ Specialist exam guide](#), written by Salesforce.

QUESTION #1

Universal Containers sells a subscription for Product Z that is sold in yearly segments, but would like to prevent the user from discounting the first segment. How should the CPQ Admin ensure the user will not be able to discount the first segment?

Choose one answer

- A. Write a Price Rule to run when Product Code = Product Z and Segment Index = 1, with a Price Action setting Non-Discountable to True.
- B. Set First Segment Term Editable to Only Custom Segments in the yearly Price Dimension record.
- C. Create two Price Dimensions, then set Non Discountable to False on the first Price Dimension.
- D. Write a Price Rule to inject 0 into Additional Discount when Product Code = Product Z and Initial Segment = True.

QUESTION #2

Universal Containers has a bundle configured and wants to add user selectable products to the configuration that will affect the bundle price. How should the CPQ Admin configure the bundle?

Choose one answer

- A. As a Product Option.
- B. As a Product Feature.
- C. Add a Price Rule.
- D. Add a Product Rule.

QUESTION #3

When configuring a bundle, Universal Containers users must select Product B and Product C in order to add Maintenance Product A. How should the CPQ Admin set this up to meet the requirement?

Choose one answer

- A. Create an Option Constraint Group "Maintenance" to require that Product A can only be selected when Products B and C are selected.
- B. Create a "Dependency" Option Constraint for Product B and an "Exclusion" Option Constraint for Product C.
- C. Create two "Exclusion" Option Constraints for Products B and C and have Product A as the constrained option for both Option Constraints.
- D. Create two "Dependency" Option Constraints for Products B and C and have Product A as the constraining option for both Option Constraints.

QUESTION #4

Based on a customer's requirements, the CPQ Admin has created multiple configuration attributes and assigned them to a single feature. Which configuration is valid for displaying the attributes?

Choose one answer

- A. Above or below all product options in the feature.
- B. Above or below the feature in the bundle.
- C. Above or below all features in the bundle.
- D. Above all product options in the feature.

APPENDIX

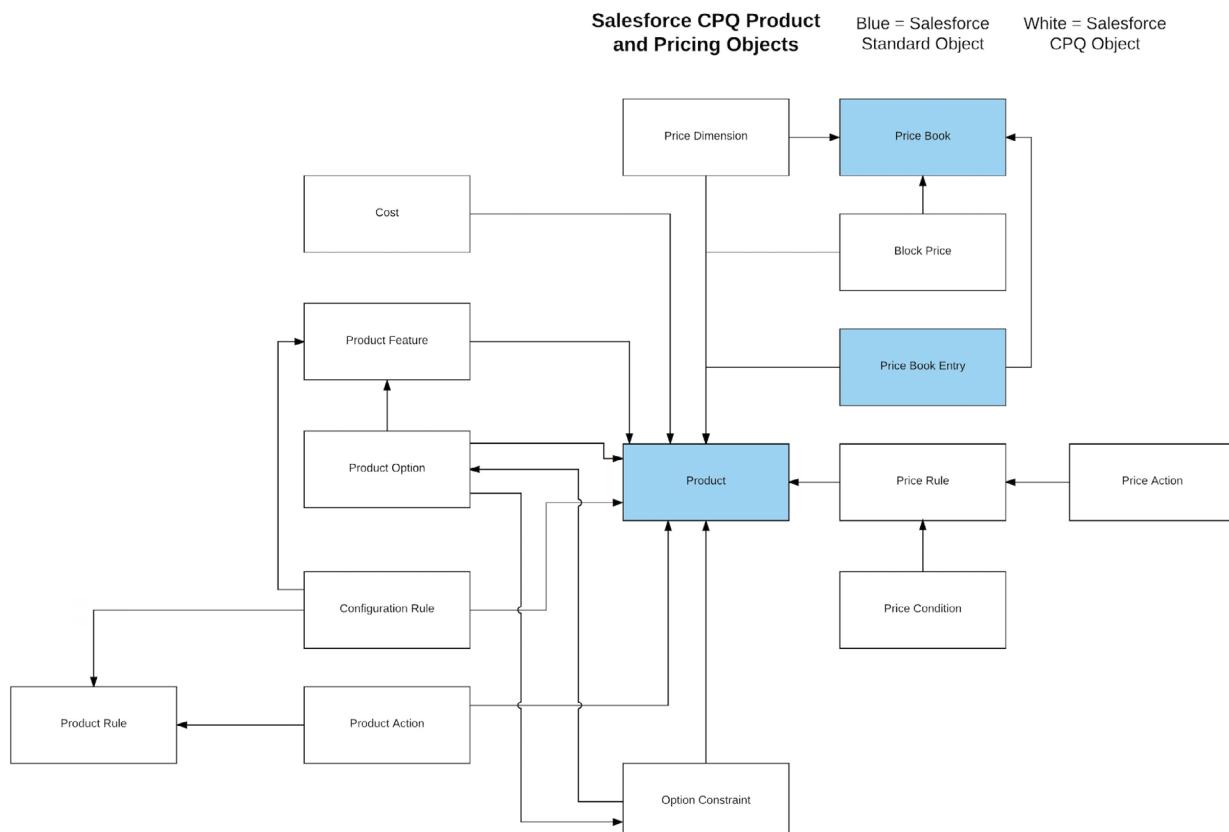
SALESFORCE CPQ PACKAGE-LEVEL SETTINGS

Learn more about Salesforce CPQ package-level settings

SALESFORCE CPQ OBJECT RELATIONSHIPS

Learn more about Salesforce CPQ object relationships

SALESFORCE CPQ PRODUCT AND PRICING OBJECTS



Answers to Example Exam Questions:

1. A 2. A 3. A 4. A

SALESFORCE CPQ TRANSACTIONAL OBJECTS

