



Salesforce CPQ Fast Path

Partner Practice Development

Don Fernando

Director Salesforce CPQ Alliances

dfernando@salesforce.com



Forward-Looking Statements



Statement under the Private Securities Litigation Reform Act of 1995

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.



Fourth Industrial Revolution



Intelligence is transforming the customer experience



The Face of Sales Is Changing

Helping is the new selling

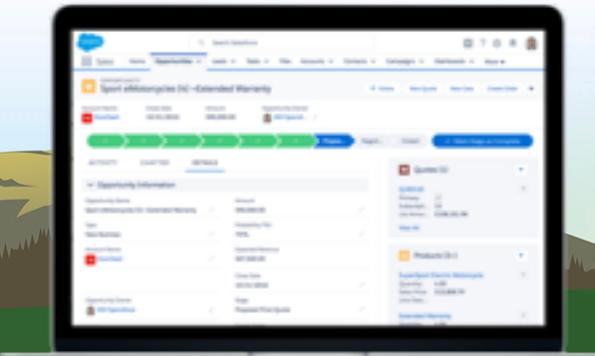


Sales Reps Struggle to Keep Up With Demands



Disconnected Data, Processes and Systems Hurt Efficiency

Sales Opportunity



Quotes & Contracts



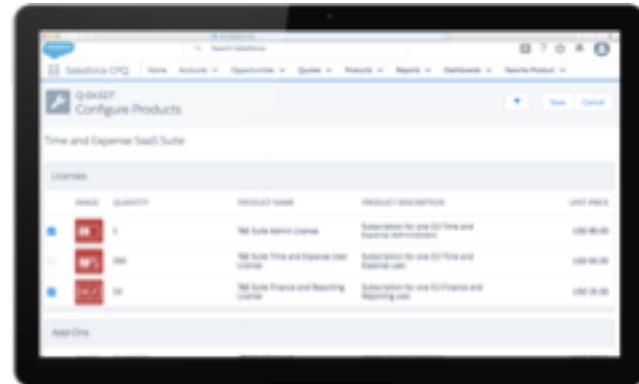
Accounting & ERP



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



Built on the world's #1 CRM



Close Deals Faster with Salesforce CPQ



Optimize quote-to-cash on the world's #1 CRM

Configure quotes with speed and accuracy

Streamline pricing, discounting and approvals

Optimize discounting and pricing

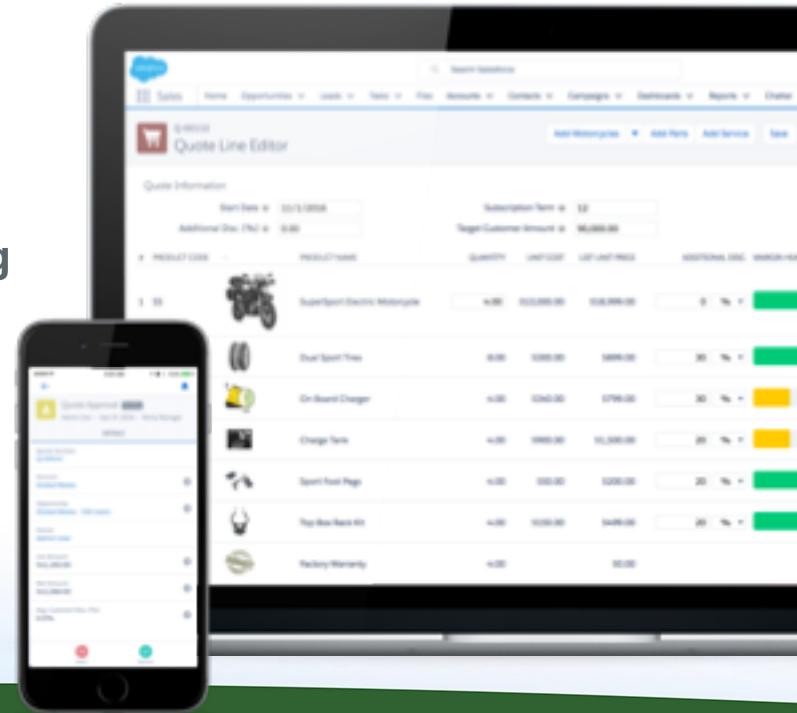
Track CPQ trends with Einstein Analytics

Increase customer retention with subscription billing

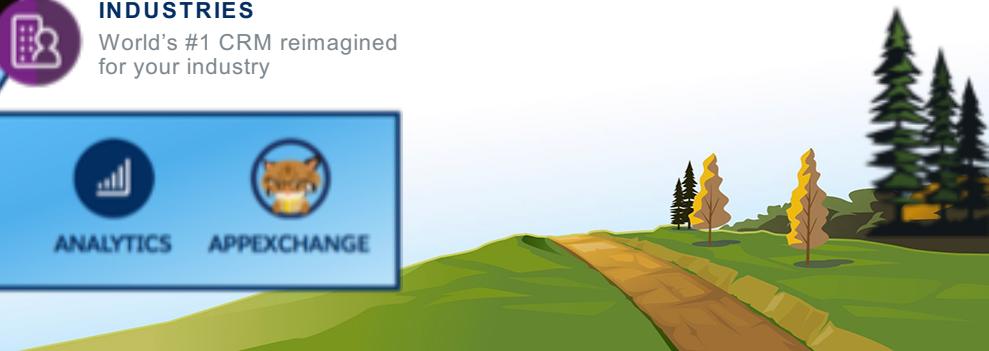
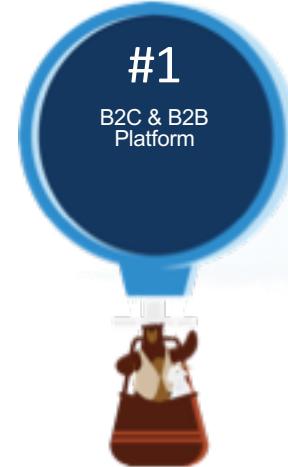
Create invoices, manage orders, and collect cash

Connect any sales process, any system

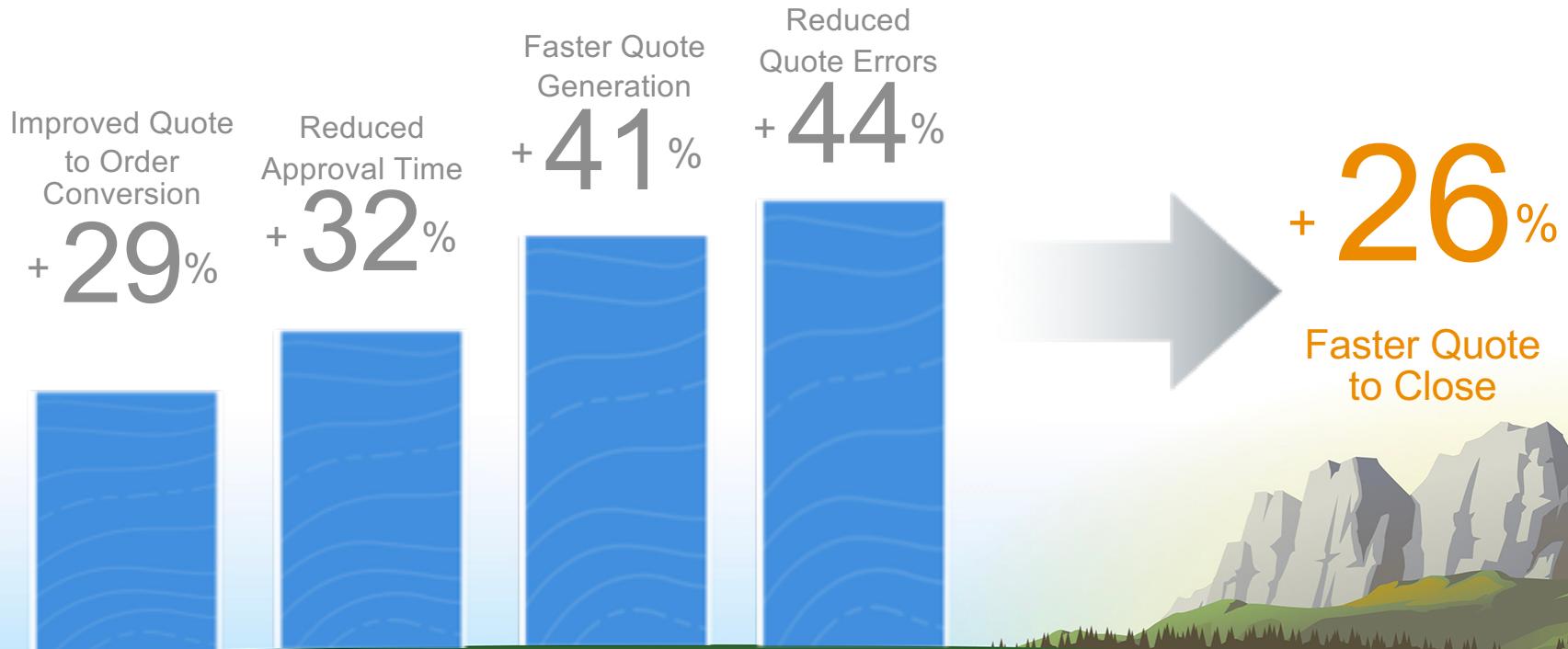
Deliver a unified experience on the Salesforce Platform



Customer Success Platform for the Fourth Industrial Revolution



Salesforce CPQ Drives Customer Success



Percentage Improvements Reported by Salesforce Customers

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

Salesforce Customers Love Quote-to-Cash

5X
Growth



The Container Store*

PAYCHEX amazon.com

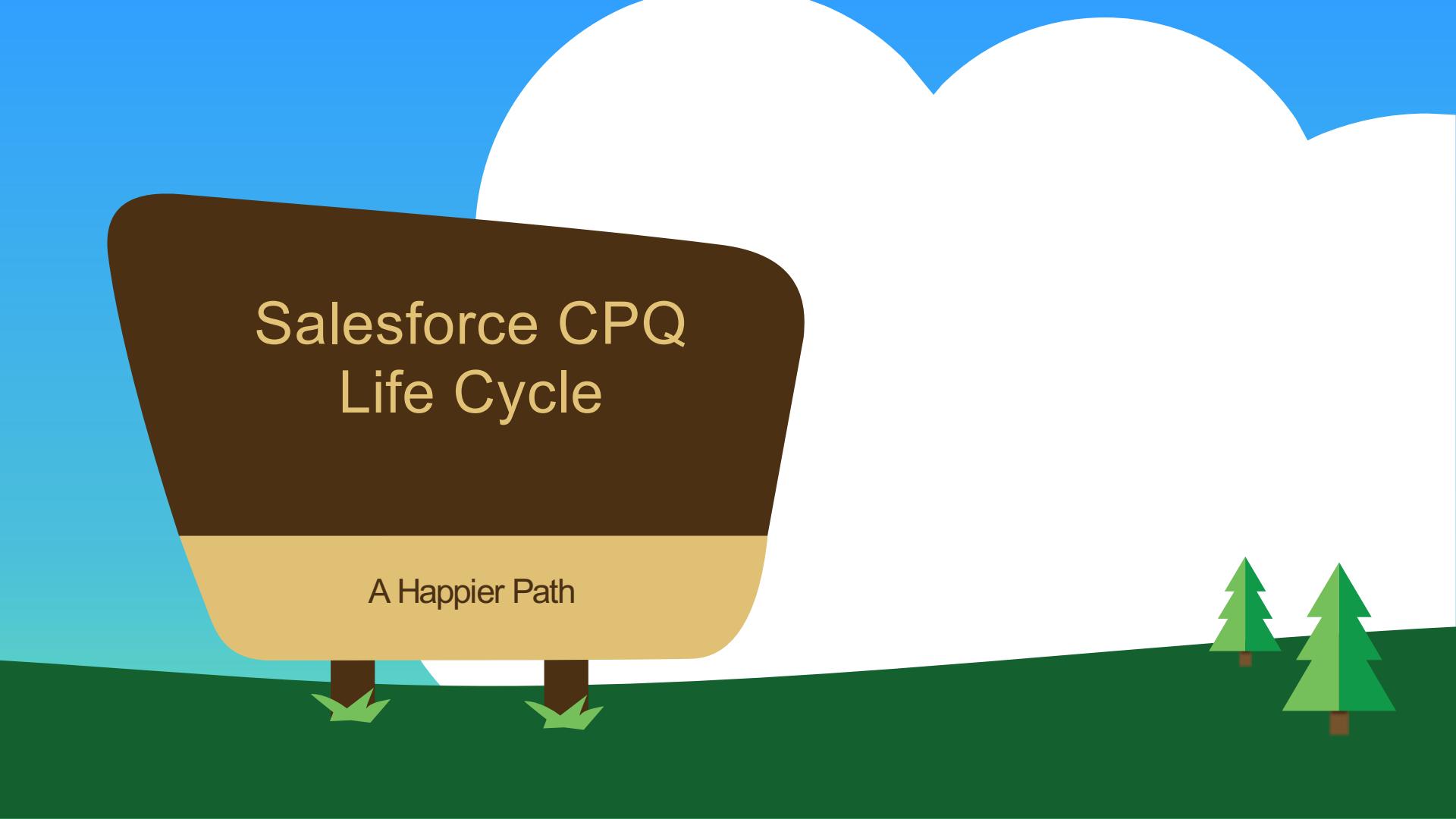
cloudera CardinalHealth SCIEX MITSUBISHI
xactly Qlik NUTANIX DOMINO RAE
TELUS MuleSoft Honeywell SHARP PACCAR



Honeywell

SHARP

PACCAR



Salesforce CPQ Life Cycle

A Happier Path

Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Product
Configuration



Pricing &
Discounting

Entire Customer Sales Cycle on Single Platform



Product
Configuration

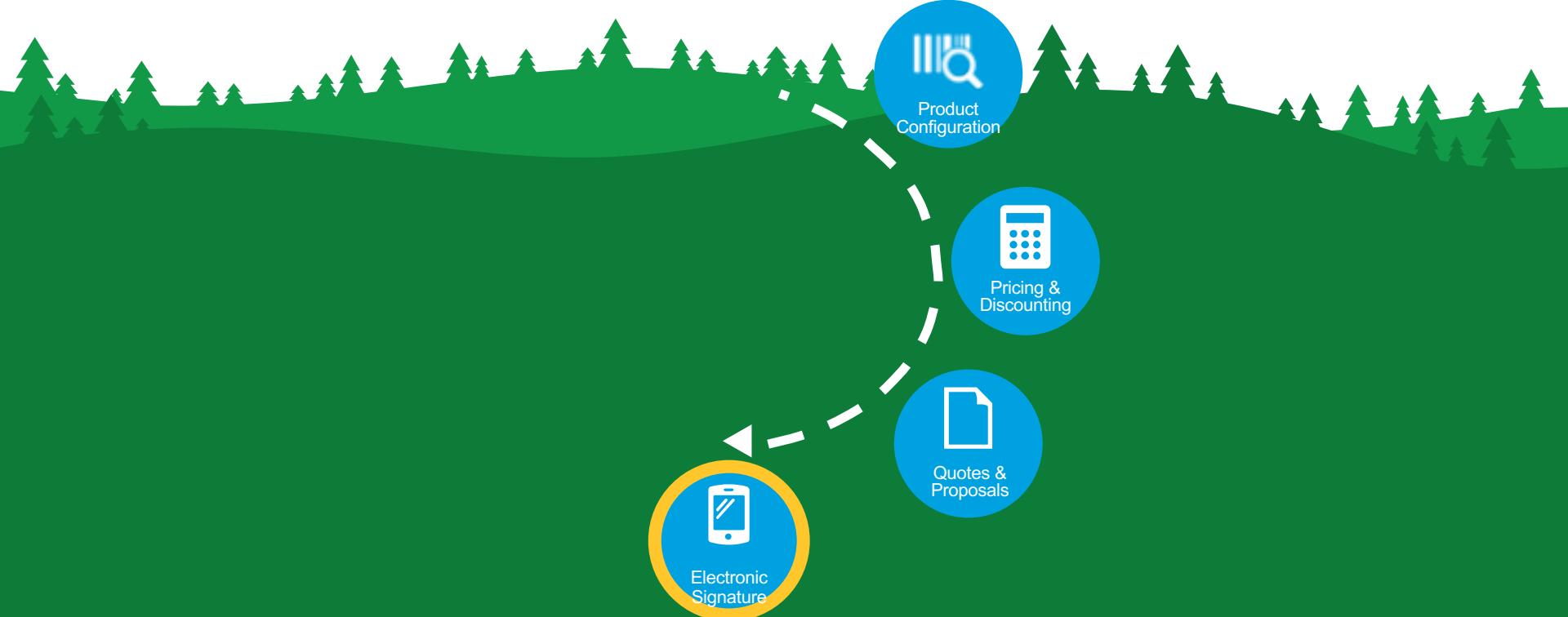


Pricing &
Discounting

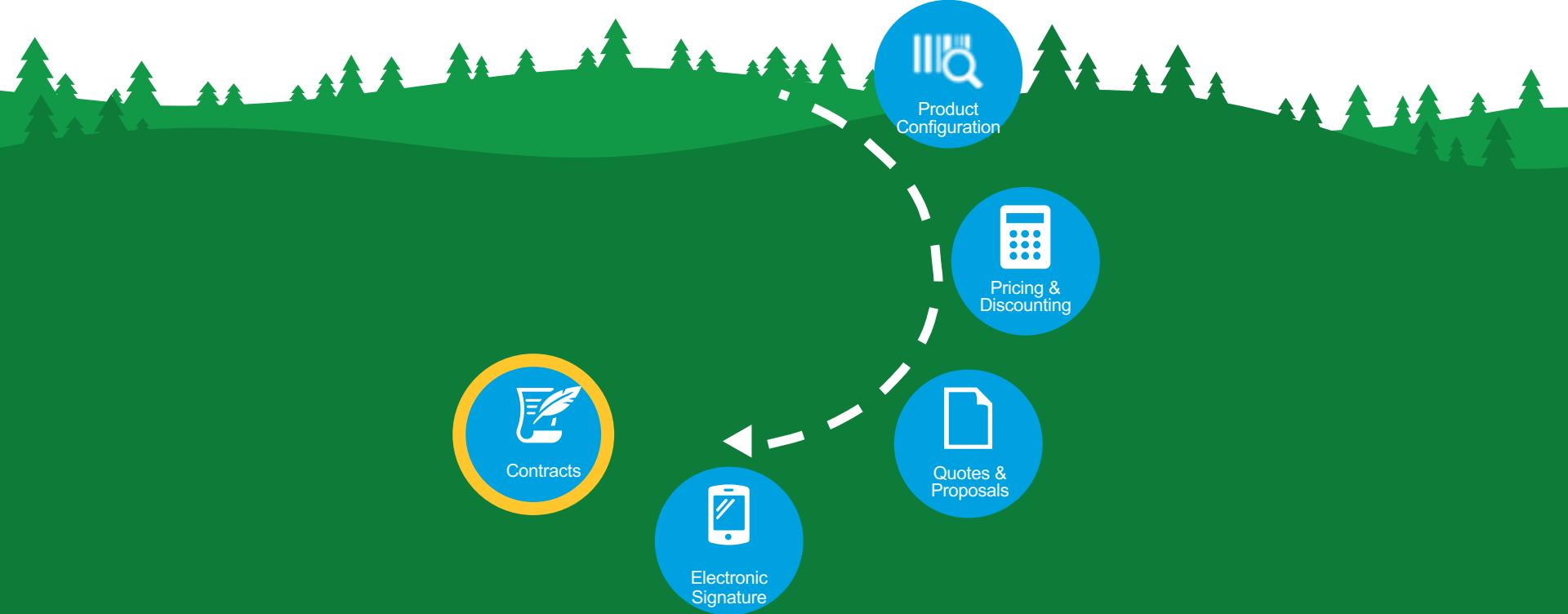


Quotes &
Proposals

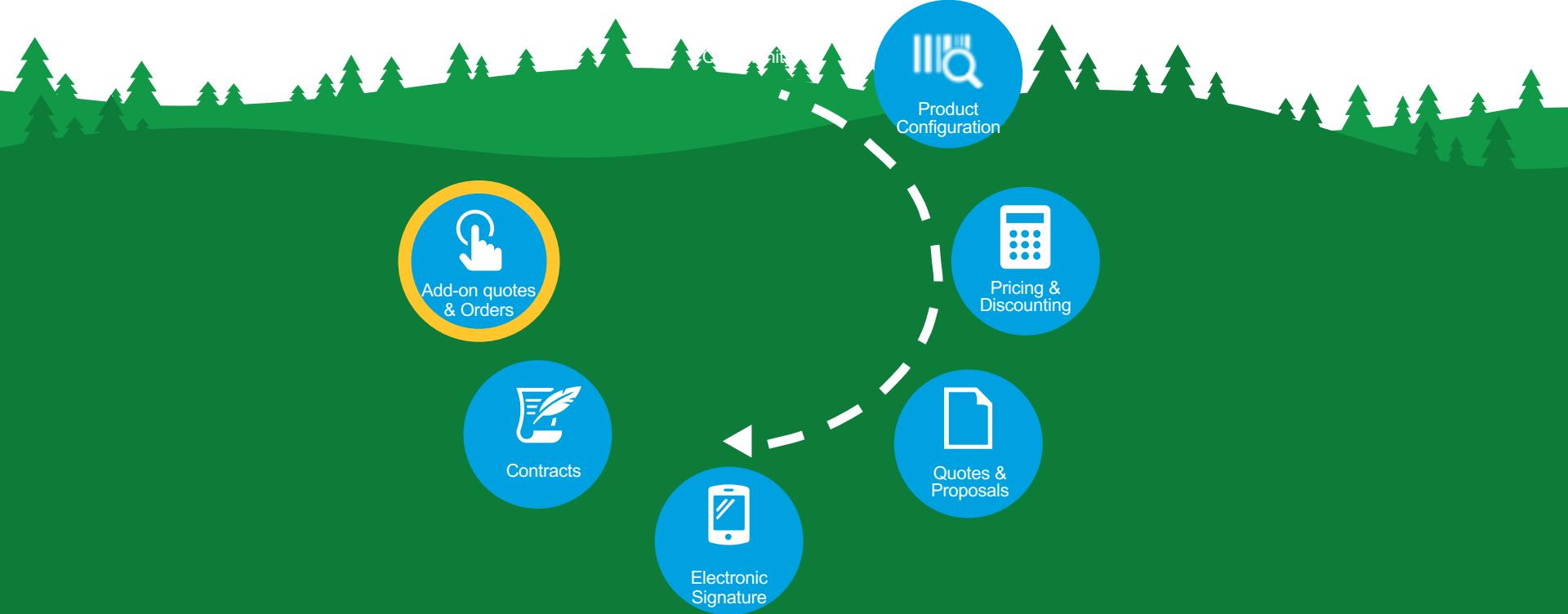
Entire Customer Sales Cycle on Single Platform



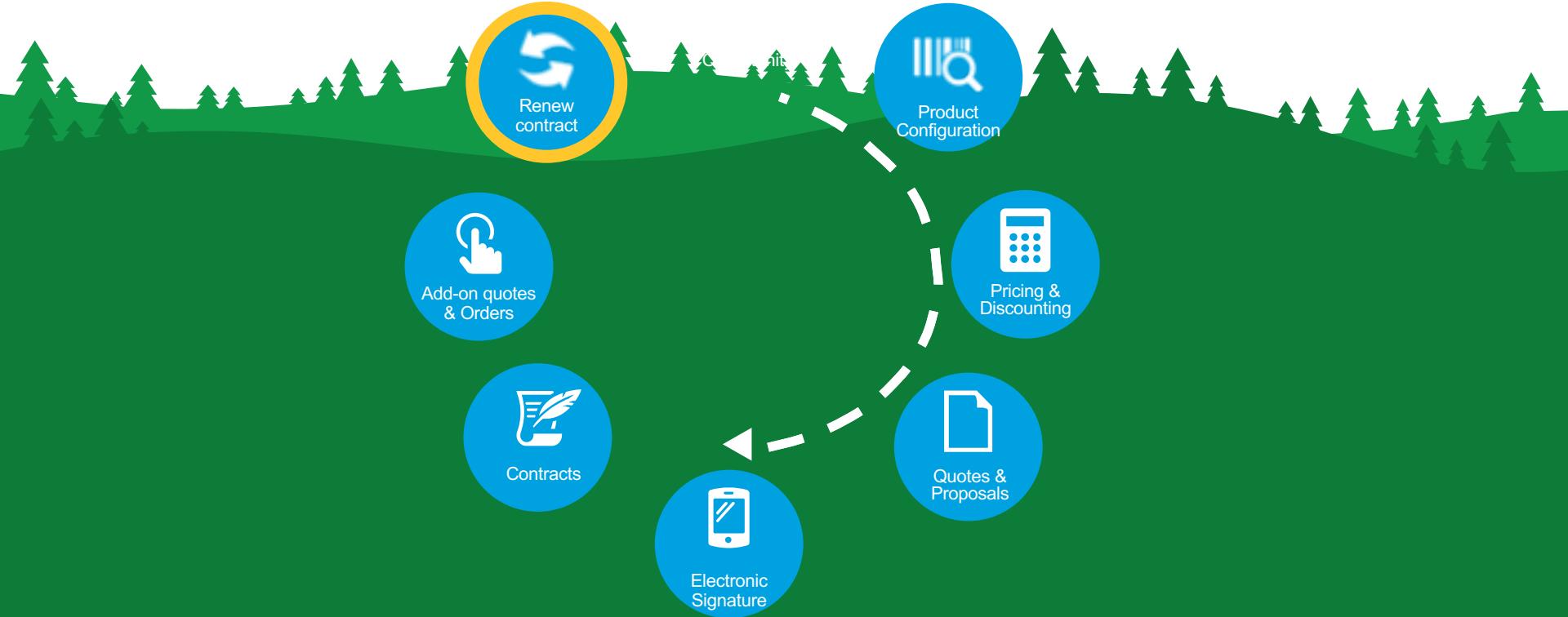
Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Earn your Salesforce CPQ Specialist Certification

Fast Track



[Certification Exam Guide](#)

**SALESFORCE CERTIFIED CPQ
SPECIALIST**

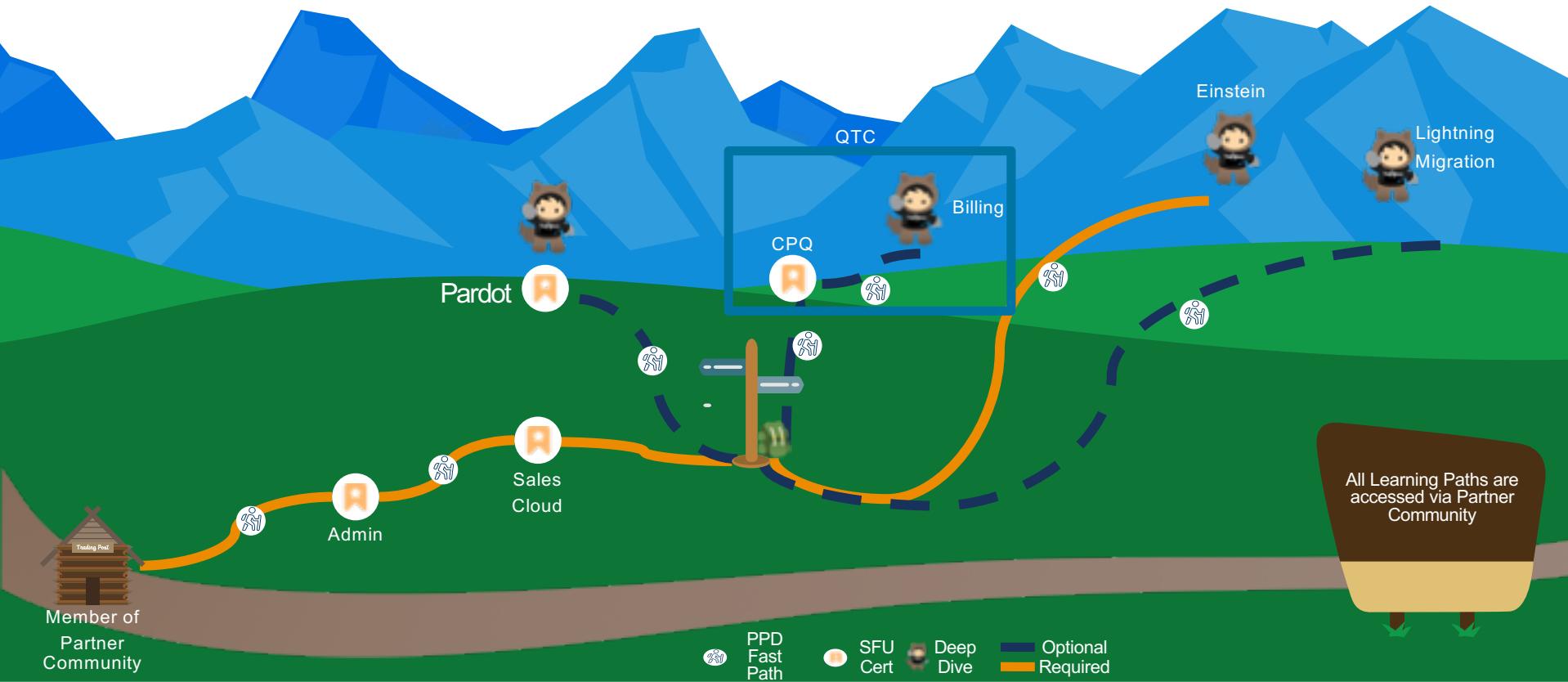
Summer '17

©2017 Salesforce.com, Inc. All rights reserved.



Partner Path to Sales Cloud Certification

Develop Sales Cloud skills



OUTLINE

Salesforce CPQ

Fast Path to CPQ Specialist Certification

Day 1

Salesforce CPQ Overview

High level CPQ overview

Products and Bundles

Product setup, Bundle Structure

Option Constraints, Configuration

*Attributes, Product Rules,
Guided Selling, Custom
Actions*

Pricing and Discounts

*Pricing Waterfall, Pricing Methods,
MDQ*

Day 2

Pricing and Discounts

Pricing Rules

Quote Templates

*Template Content and Sections, Line
Item Columns, Quote Terms*

Contracting Process

*Contract Creation, Amendments,
Renewals*

CPQ Platform

Package Settings, Debugging

Implementation Methodology

PRE-REQUISITES

Qualified attendees will need to have completed the following:

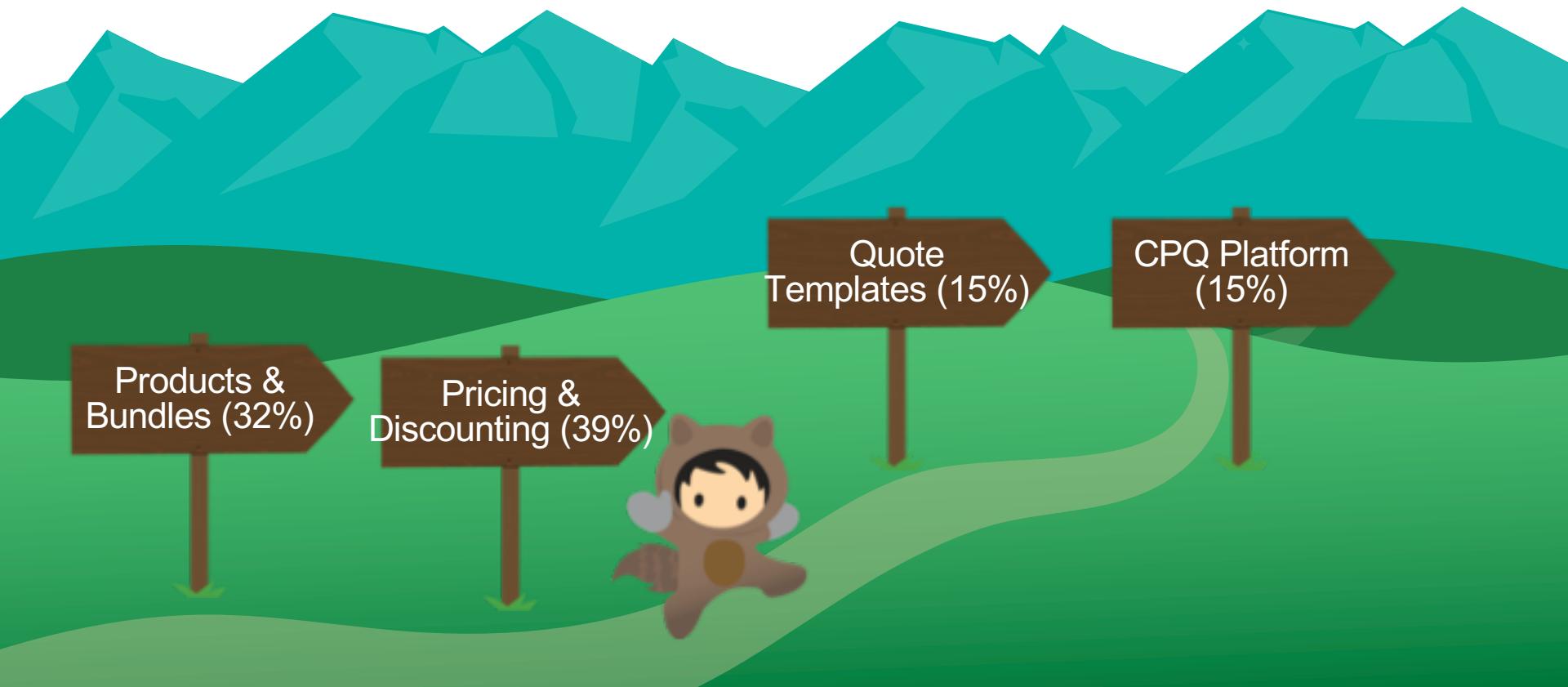
- Trailhead
 - ✓ Sales Cloud Platform: Quick Look
 - ✓ Salesforce CPQ Basics
- Salesforce Sales Cloud Certification (Required)
- Completion of a CPQ self-led class on Partner Community:
 - ✓ CPQ201 (Recommended)
 - ✓ CPQ211 (Preferred)

Post Workshop Requirements:

- STUDY! Review articles in the CPQ Specialist Study Guide
- Complete CPQ211 and Knowledge Check
- Register and take the CPQ Specialist Certification Exam!



4 Focus areas of study



Login to your Salesforce CPQ Training Org

Fast Track

Configure Products

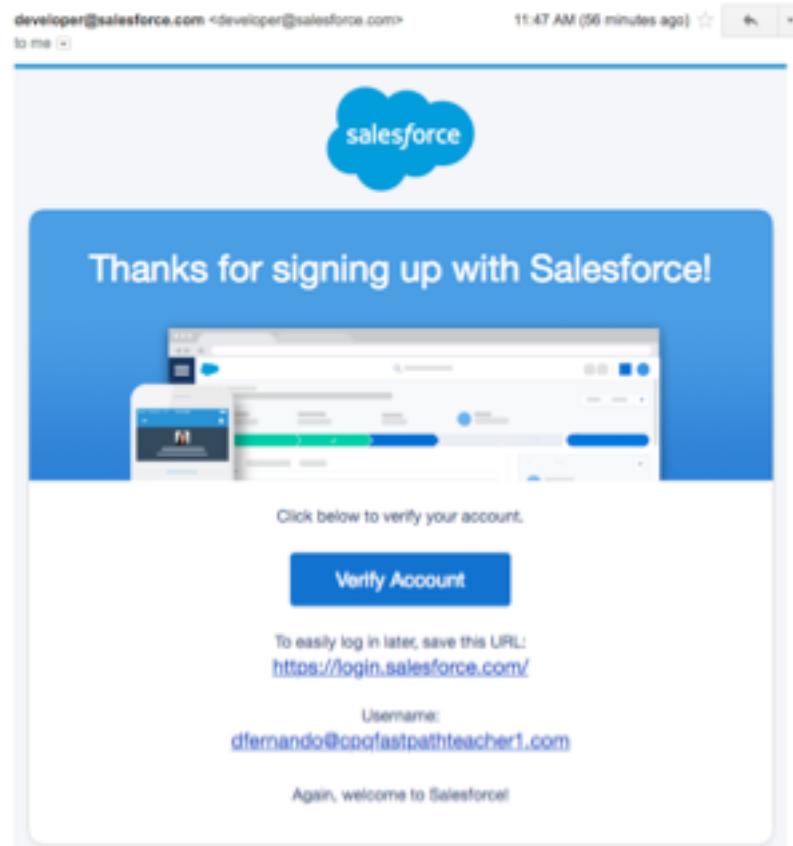
IT Professional Pack

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

Access your CPQ Training Organization

Verify your account

- CPQ package installed
- Will be active for 90 Day
- Default password is: password123
- Reset if needed



View Package Settings for Advanced Calculator

Installed Package > Configure > Pricing and Calculation tab

SteelBrick CPQ Settings

Save Cancel

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

Documents	Groups	Line Editor	Plugins	Pricing and Calculation	Subscrip	Al Settings
Currency Symbol ⓘ				Use Inv		
Unit Price Scale ⓘ	2			Calculate I		
Enable Quick Calculate ⓘ	<input type="checkbox"/>			Disable I		
Use Legacy Calculator ⓘ	<input type="checkbox"/>			Calculat		
Authorize new calculation service						salesforce
Allow Access?						Allow Access?
SteelBrick CPQ is asking to:						
<ul style="list-style-type: none">Access your basic informationAccess and manage your dataPerform requests on your behalf at any time						
Do you want to allow access for brian@cloutier012015.com? (Not you?)						
Deny Allow						
To revoke access at any time, go to your personal settings.						

salesforce

Create Sample Salesforce CPQ Quote

Implementation Process Overview

Create an Account, Contact, and Opportunity

- Makes the records used in a standard sales cycle

Create a Quote

- Begins a quote with defined subscription properties

Add Products (MacBook)

- Includes a variety of subscription and one-time products

Update Quantities, Calculate, then Save

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

PRODUCTS AND BUNDLES

- 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.



Call to Action

Focus on skill & knowledge related to exam objectives



Non-Subscription Products

Salesforce CPQ Product Fields

Implementation Process Overview

Update Products

Product Detail

Product Name: Apple MacBook Pro

Product Code: AP-MBPRO

Active:

Product Family: Hardware

Salesforce CPQ Information

Pricing Method: List

Quantity Editable: ✓

Non Discountable:

Discount Schedule:

Pricing Method Editable:

Exclude From Opportunity:

Asset Conversion: One per quote line

Hidden:

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

Select to exclude
bundle product from
document output

Key Concepts

Non Subscription Product Setup

During contract creation, non subscription Products will convert to an Asset

- Understand the difference between Asset conversion selection options (ie One-per-quote-line and One-per-unit)

Understand CPQ Product Fields settings that control user input and presentation

- Quantity Editable checkbox field
- Non Discountable checkbox field
- Hidden checkbox field



Subscription Products

Subscription Fields for Subscription Products

Implementation Process Overview

Product Detail

Product Name	Microsoft Office 365	Edit	Delete	Clone	Clone with Related	Translate
Product Code	MS-OFFICE365	Active <input checked="" type="checkbox"/>				
						Product Family Software

Salesforce CPQ Information

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

Subscriptions

Subscription Pricing Fixed Price <input type="checkbox"/>	Percent Of Total (%) <input type="checkbox"/>
Subscription Term 1 <input type="checkbox"/>	Percent Of Total Category <input type="checkbox"/>
Percent Of Total Base List <input type="checkbox"/>	Percent Of Total Target <input type="checkbox"/>

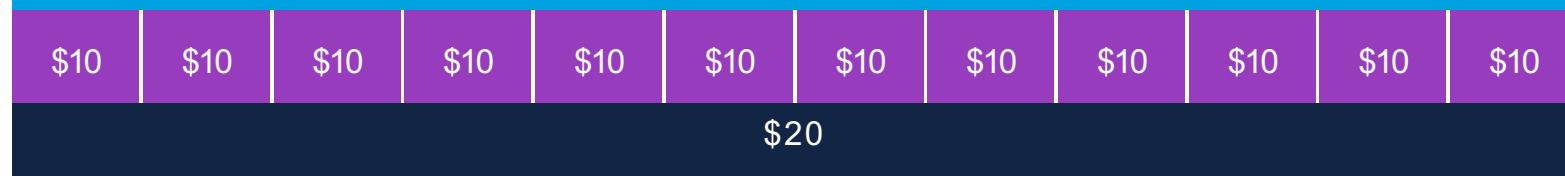
Products Tab> Product Views & "Go"> Microsoft Office 365

Subscription Term

Product Subscription Term & Quote/Quote Line Subscription Term

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

Quote's Subscription Term = 12

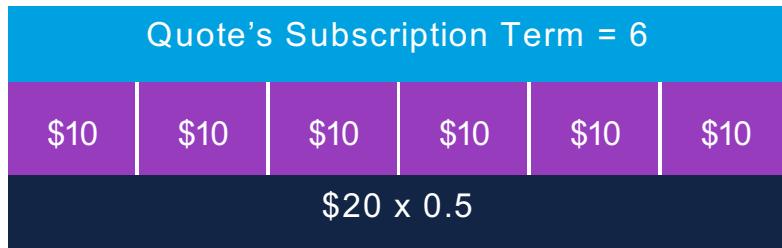


= \$120

= \$20

Subscription Term & Proration

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



= \$60

$\$20 \times 0.5$

= \$10

View Package Settings for Subscription Products

Implementation Process Overview

Settings Editor
Salesforce CPQ

Save Cancel

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

The screenshot shows the 'Subscriptions and Renewals' tab selected in the Settings Editor for the Salesforce CPQ package. Several configuration options are displayed, with two specific settings highlighted by orange boxes: 'Subscription Prorate Precision' (set to 'Month') and 'Subscription Term Unit' (set to 'Month').

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

Key Concepts

Subscription Product Setup

During contract creation, subscription Products will convert to Subscription records

Understand product settings to set up a subscription product

- Subscription Pricing: Fixed
- Subscription Term (in months)
 - Difference between monthly and yearly term settings
- Subscription Type (Renewable or One-time)

Related Knowledge Base Articles:

- [Subscription Products](#)



Q: Which Subscription field values should the CPQ Admin set in order to sell a product that does not renew and prorate on a yearly basis.

- A. Subscription Term: 12; Type: Renewable; Pricing: Fixed Price
- B. Subscription Term: 12; Type: One-Time; Pricing: Fixed Price
- C. Subscription Term: 1; Type: Renewable; Pricing: Fixed Price
- D. Subscription Term: 1; Type: One-Time; Pricing: Fixed Price

Percent of Total (POT) Subscription Products

Subscription Fields for Percent of Total Products (POT)

Implementation Process Overview

The screenshot shows the 'Product Detail' screen for a product named 'Loss and Damage Warranty' (Product Code: LDWARRANTY). The product is active and assigned to the 'Support' family.

Salesforce CPQ Information:

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

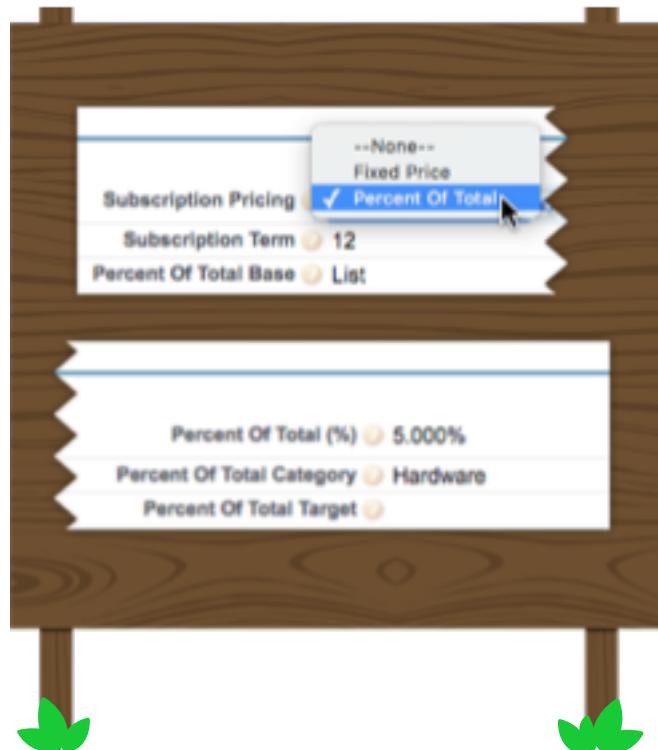
Subscriptions:

- Subscription Pricing: Percent Of Total
- Subscription Term: 12
- Percent Of Total Basis: 5.00%
- Percent Of Total Category: Hardware
- Include In Percent Of Total:
- Exclude From Percent Of Total:

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

Subscription Pricing

Percent of Total



End-User Experience



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

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

Watch and Learn: Test Percent of Total Products

The following Products are set up in your Training Org

Product Code	Subscription Pricing	Subscription Term	Per. of Total Category	Per. of Total (%)	Quantity Editable	Non Discountable
ADMINHOUR	Fixed Price	1				
AP-TBDISPLAY			Hardware			
CLOUDSTORAGE	Fixed Price	12				
ITPROPACK					False	True
LJ-PRINTER			Hardware			
LDWARRANTY	Percent of Total	12	Hardware	5.0		
MS-OFFICE365	Fixed Price	1				True
WARRANTY	Percent of Total	12	Hardware	0.5		
WIFIROUTER			Hardware			

Key Concepts

Subscription Percent of Total Product Setup

During contract creation, subscription Products will convert to Subscription records

Understand product settings to set up a percent of total subscription product

- Subscription Pricing: Percent of Total
- Percent of Total (%)
- Percent of Total Category

Related Knowledge Base Articles:

- [Percent of Total Pricing](#)



Bundles

Product Bundles Overview

A collection of products that are sold together

Assists sales reps while enforcing business logic

- Required products
- Min/max selections
- Quantity relationships

Example Bundle

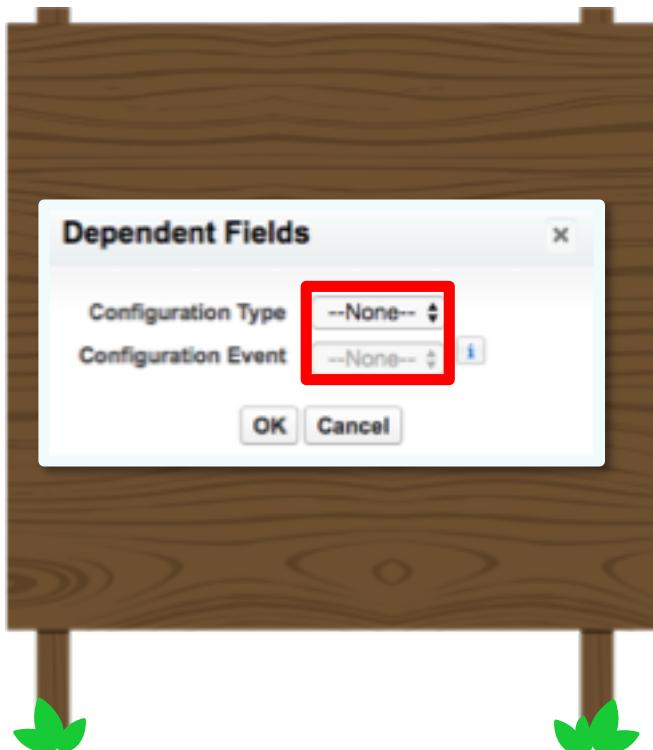
Product A
Product B
Product C
Product D (2x)
Product E
Product F
Product G
Product H
Product I

Product Bundles Overview

#	Product Code	Product Name	Quantity	List Unit Price	Actions	Net Total	Actions
1	AP-MBPRO	Apple MacBook Pro	1.00	\$1,500.00		\$1,050.00	
2	CPU28GHZI7	CPU 2.8GHz i7	1.00	\$250.00		\$175.00	
3	RAM16GB	RAM 16GB	1.00	\$125.00		\$87.50	
4	SSD512	SSD Hard Drive 512GB	1.00	\$150.00		\$105.00	
5	ITPROPACK	IT Professional Pack	1.00	\$0.00		\$0.00	
6	LJ-PRINTER	LaserJet Printer	6.00	\$275.00		\$840.00	
7	LJ-TONER	LaserJet Toner Cartridge	12.00	\$125.00		\$1,029.00	
8	LJ-MAINTKIT	LaserJet Maintenance Kit	12.00	\$20.00		\$164.64	
9	LJ-PAPERLETTER	LaserJet Paper Letter	12.00	\$10.00		\$98.76	
						\$3,549.90	

Configuration Event Variations

Configuration Type: None, Configuration Event: None (Default Settings)



End-User Experience

The screenshot shows the Salesforce interface with a 'Product Selection' dialog box. The dialog has a 'Select' button highlighted with a red box. Below it, a checkbox for 'ITPROPACK' is checked, also highlighted with a red box. The dialog includes fields for 'PRODUCT CODE' and 'DESCRIPTION'.

Add Products Save Quick Save Cancel Calculate Delete Lines Add Group

Q-00002 Product Selection

PRODUCT CODE PRODUC Select & Add More Cancel

ITPROPACK IT Professional Pack

Configuration Event Variations

Configuration Type: None, Configuration Event: None

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



Q-00004

Configure Products



Cancel

Save

IT Professional Pack

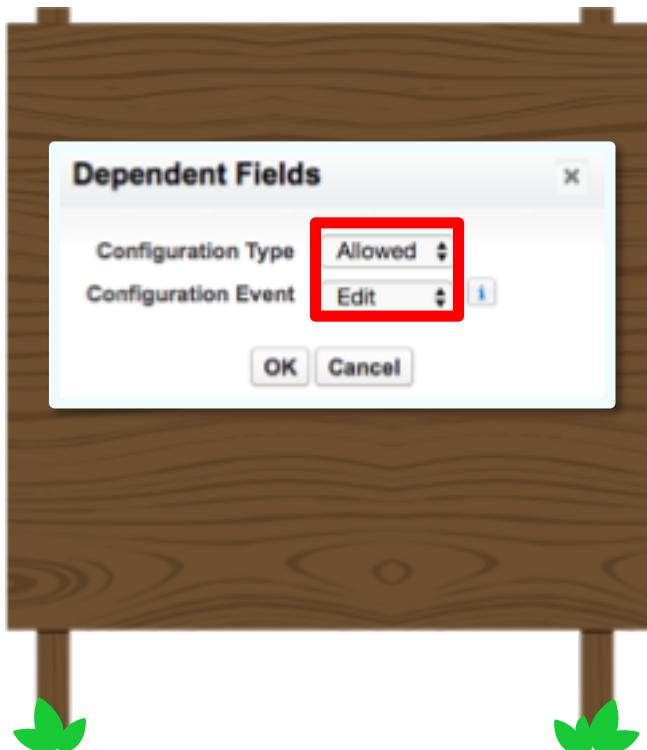
Computers

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

Peripherals

Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Edit



End-User Experience

Add Products Save Quick Save Cancel Calculate Delete Lines Add Group

Q-00002 Product Selection

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

Select Select & Add More Cancel

A screenshot of a Salesforce interface showing a 'Product Selection' dialog. The dialog lists a single product: 'IT Professional Pack' with code 'ITPROPACK'. The 'Select' button is highlighted with a red box. The background shows a toolbar with various buttons like 'Add Products', 'Save', and 'Calculate'.

Configuration Event Variations

End-User Experience



Configuration Type: Allowed, Configuration Event: Edit

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

Q-00004
Configure Products ▼ Cancel Save

IT Professional Pack

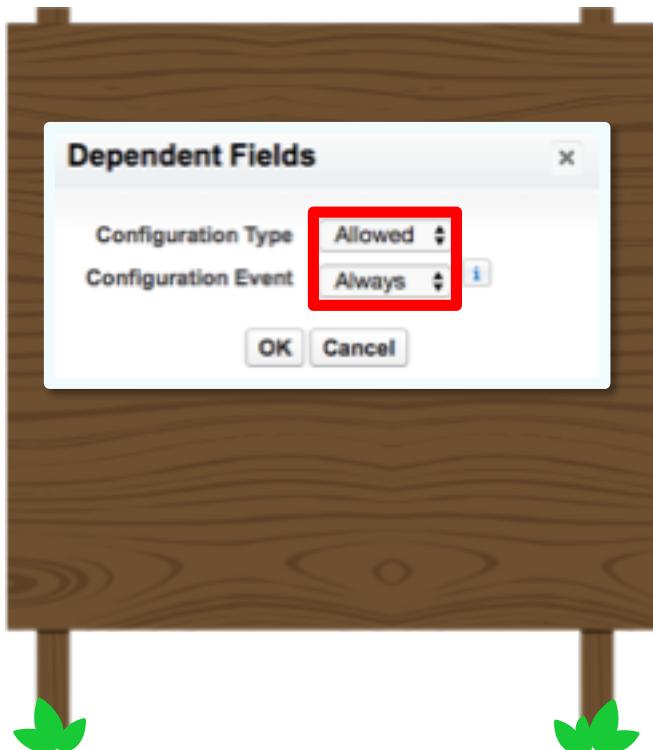
Computers

Quantity	Product Code	Product Name	Product Description	Unit Price
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	USD 1,500.00

Peripherals

Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Always



A screenshot of a Salesforce interface showing a product selection dialog. The 'Add Products' button and the 'Select' button in the dialog are highlighted with red boxes.

Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Always

Q-00004
Configure Products

IT Professional Pack

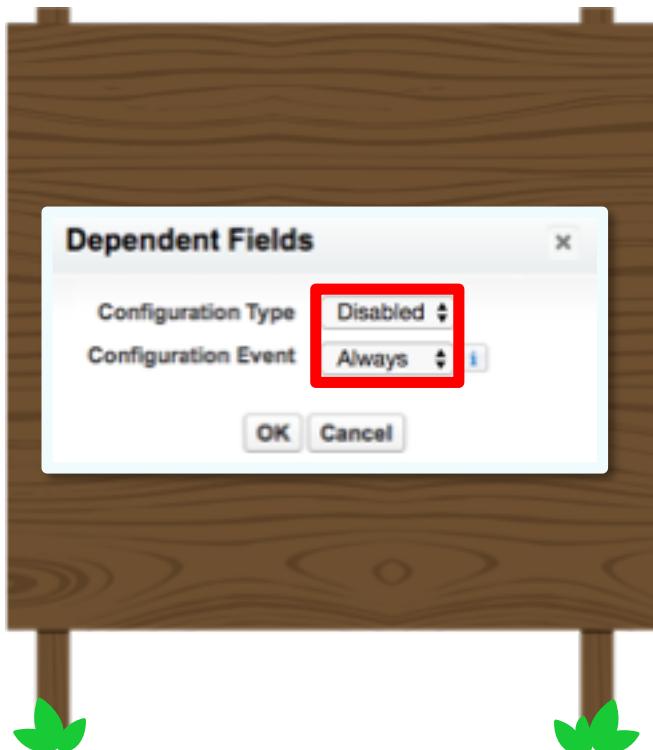
Computers					UNIT PRICE
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE	
<input checked="" type="checkbox"/> 1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)	USD 1,500.00	

Peripherals

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

Configuration Event Variations

Configuration Type: Disabled, Configuration Event: Always



End-User Experience 

Configuration Event Variations

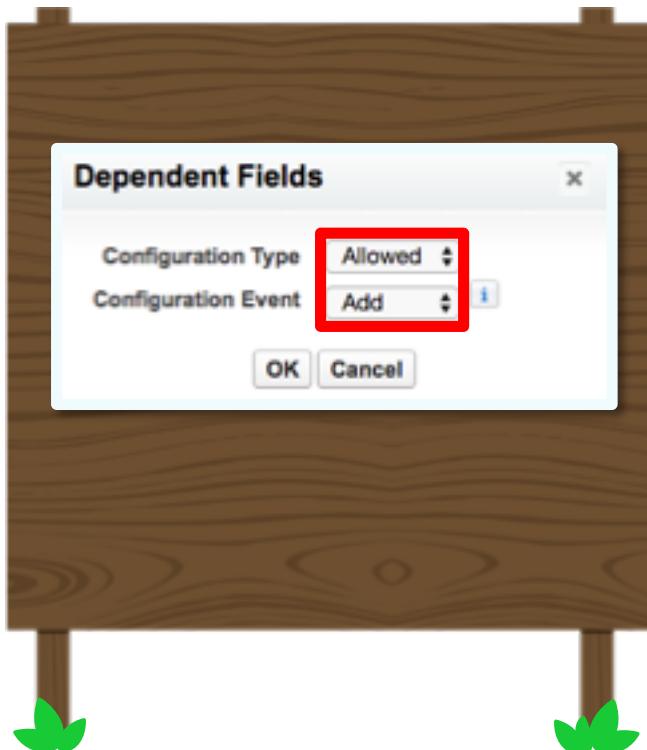
Configuration Type: Disabled, Configuration Event: Always

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



Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Add



End-User Experience

Add Products Save Quick Save Cancel Calculate Delete Lines Add Group

Q-00002 Product Selection

PRODUCT CODE ITPROPACK Select Select & Add More Cancel

IT Professional Pack

Configuration Event Variations

Configuration Type: Allowed, Configuration Event: Add

Q-00004
Configure Products

IT Professional Pack

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

Peripherals

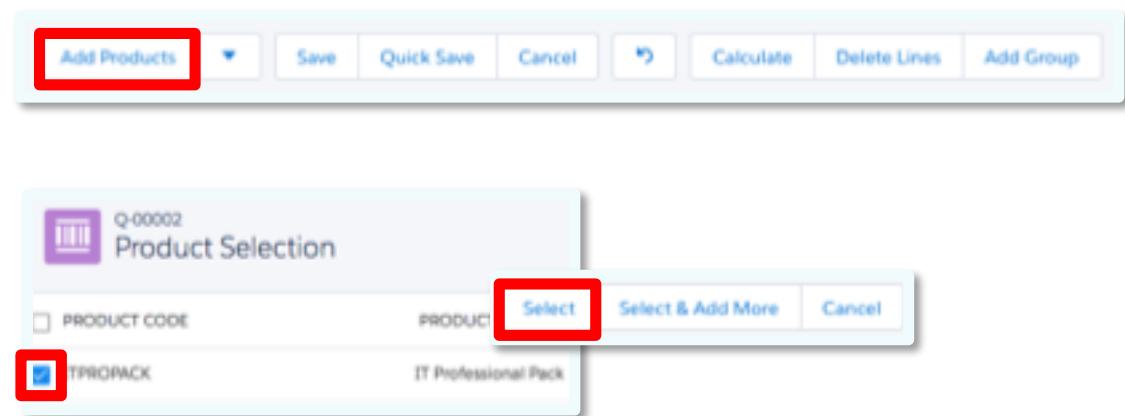
#	PRODUCT CODE	PRODUCT NAME	QUANTITY	DESCRIPTION	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	ITPROPACK	IT Professional Pack	1.00		USD 0.00		USD 0.00	USD 0.00
2	AP-MBPRO	Apple MacBook Pro	1.00	15" Apple MacBook Pro (2016)	USD 1,500.00		USD 1,500.00	USD 1,500.00

Save 



Configuration Event Variations

Configuration Type: Required, Configuration Event: Always



Configuration Event Variations

Configuration Type: Required, Configuration Event: Always

Q-00004
Configure Products

IT Professional Pack

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

Peripherals

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

Configuration Event Variation Summary

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



Key Concepts

Product Bundle setup

Understand Type/Event settings that prevents/allows initial configuration and reconfiguration

- Note: unchecking the active checkbox on “Reconfigure Line” custom action can also disable reconfiguration

Related Knowledge Base Articles:

- [Setting Configuration Type](#)
- [Product Managed Fields](#)



Features

Watch and Learn

IT PRO PACK Printing Feature and Options have been built out

Q-00002
Configure Products ▼ Cancel Save

IT Professional Pack

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

Product Bundles Defined

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

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

Feature Fields

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

Key Concepts

Feature setup

Understand how the Number field controls feature order

Understand how the Min/Max functions control user selection

- Setting Max = 1 will display radio buttons instead of checkboxes

Category setting allows for another level of organization with a feature

Related Knowledge Base Articles:

- [Product Features](#)
- [Use Radio Buttons in Configuration](#)



Q: A CPQ Admin wants to ensure a user selects at least one “Service” feature to a bundle. The CPQ Admin also wants to ensure the user selects at least one and no more than two in the “Support” feature. What would be the proper setup for this requirement?

- A. Set the Min Options for "Service" to be one. Set the Min Options to one and Max Options to two for "Support".
- B. Set the Max Options for "Service" to be one. Set the Min Options to one and Max Options to two for "Support".
- C. Set the Min Options for "Service" to be one. Set the Min Options to zero and Max Options to two for "Support".
- D. Set no Min Options or No Max for "Maintenance". Set the Min Options to zero and Max Options to two for "Support".

Product Options

Options Fields

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

Options Fields

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

Option Types for MacBook Pro

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

Option Types Illustrated

Q-00012
Configure Products ▼ Cancel Save

IT Professional Pack

Location -None-

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

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

Option Types Illustrated

Q-00012
Edit Quote

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

Quote Information

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

Quote Line View -None--

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

Option Types Illustrated

Q-00012
Edit Quote

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

Quote Information

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

Quote Line View None

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

3.00

Type: Component

Type: Component

Type: Component

Type: Accessory

Type: Related Product

Dependent on bundle quantity, locked

Independent on bundle quantity, locked

Option Types Illustrated

Q-00012
Edit Quote

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

Quote Information

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

Quote Line View: -None-

#	Product Code	Product Name	Quantity	List Unit Price	Additional Desc.	Net Unit Price	Net Total	Package Total	Actions			
1	ITPROPACK	IT Professional Pack	1.00	\$0.00		\$0.00	\$0.00	\$112,567.50				
2	AP-MBPRO	Apple MacBook Pro	3.00	\$1,500.00		\$1,500.00	\$4,500.00	\$4,500.00				
3	CPU22GHZI7	CPU 2.2GHz i7	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00				
4	Dependent on bundle quantity, locked		3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00				
5	SSD256	SSD Hard Drive 256GB	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00				
6	Independent on bundle quantity, locked		1.00	\$22.50	Type: Accessory	\$67.50	\$67.50	\$67.50				
7	M	Independent on bundle quantity, free to edit	100.00	\$10.00	Type: Related Product	\$108,000.00	\$108,000.00	\$108,000.00				
SUBTOTAL:								\$112,567.50				
QUOTE TOTAL: \$112,567.50												

Watch and Learn

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

Information Required Information

Number	10
Quantity	1
Quantity Editable	<input checked="" type="checkbox"/>
Selected	<input checked="" type="checkbox"/>
Required	<input type="checkbox"/>
Min Quantity	
Max Quantity	
Discount Schedule	

Configured SKU IT Professional Pack

Optional SKU	Apple MacBook Pro
Feature	Computers
Type	Related Product

Unit Price
Discount (%)
Discount (Amt)



Build and Learn

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

Optional SKU	Feature	Type	Num	Qty	Qty Editable	Selected	Min Qty
Apple MacBook Pro	Computers	Related Product	10	1	True	True	
Apple US Keyboard	Peripherals	Related Product	10	1	True		
Apple UK Keyboard	Peripherals	Related Product	20	1	True		
Apple Magic Mouse	Peripherals	Related Product	30	1	True		
Apple Thunderbolt Display	Peripherals	Related Product	40	1	True		

Build and Learn

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

Optional SKU	Feature	Type	Num	Qty	Qty Editable	Selected	Min Qty
LaserJet Printer	Printing	Accessory	10	1	True		
LaserJet Toner Cartridge	Printing	Accessory	20	1	True		
LaserJet Maintenance Kit	Printing	Accessory	30	1			
LaserJet Paper Letter	Printing	Related Product	40	1	True		
LaserJet Paper A4	Printing	Related Product	50	1	True		
WiFi Router	Networking	Accessory	10	1			
WiFi Access Point	Networking	Accessory	20	1			

Build and Learn

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

Optional SKU	Feature	Type	Num	Qty	Qty Editable	Selected	Min Qty
WiFi Installation	Networking	Accessory	30	1			
Warranty	Subscriptions	Accessory	10	1			
Loss and Damage Warranty	Subscriptions	Accessory	20	1			
Microsoft Office 365	Subscriptions	Related Product	30		True		
Cloud Storage 1GB	Subscriptions	Related Product	40		True		
Admin Hour	Subscriptions	Accessory	50	20	True		10

Exercise 5

Create Options



Key Concepts

Options setup

Understand the behavior and differences between Option Types:

- Component, Accessory, Related Product

The ‘Bundled’ checkbox will show List Price as “Included” and Net Price as \$0

The ‘Quote Line Visibility’ controls which options can show up on the Quote Document

The ‘Apply Immediately’ will trigger rules to run after selection

Try: changing Option Selection method from ‘Click’ to ‘Add’ on the bundle, the product collapses options and allows for an ‘Add’ link to expand



Key Concepts

Options setup (continued)

Nested bundles: an Option's Optional SKU can reference other bundled products (ie. the MacBook Pro within the ITPROPACK bundle)

Related Knowledge Base Articles:

- [Product Features](#)
- [Adding Options](#)
- [Changing Option Selection Method](#)



Q: A CPQ Admin wants to set up a product option such that the quantity must be multiplied by the quantity of the bundle product.

- A. Select the Bundled checkbox on the Product Option.
- B. Select Component as the Type field on the Product Option.
- C. Select the Quantity Editable checkbox on the Product Option.
- D. Select the Multiplier checkbox on the Bundle.

Configured Code Pattern

Configured Code Pattern

Example

<input type="checkbox"/>	#	PRODUCT NAME	PACKAGE PRODUC...	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.
<input type="checkbox"/>	1	Apple MacBook 11.6" PAIR	PAIR-1.6-8-128	1.00	USD 1,300.00	
	2	CPU 1.6GHz i5		1.00	Included	
	3	RAM 8GB		1.00	Included	
	4	SSD Hard Drive 128GB		1.00	USD 50.00	

Configured Code Pattern

Update Product Field

Salesforce CPQ Configuration

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

Salesforce CPQ Renewals

Renewal Product Processor	Edit Delete Clone Clone with Related
--	--

Features

Action	Feature Name	Min Options	Max Options	Number
Edit Del	Processor	1	1	10
Edit Del	Memory	1	1	20
Edit Del	Storage	1	1	30

New Product Feature

Features Help ?



Configured Code Pattern

Update Product Options for AP-MBAIR

▼ Optional SKU Information	
Product Code	CPU16GHZ15
Product Name	CPU 1.6GHz i5
Product Description	
Price Editable	No
Product Configuration Type	
▼ Advanced Settings	
Component Code	1.6
Component Code Position	10
▼ Optional SKU Information	
Product Code	RAM16GB
Product Name	RAM 16GB
Product Description	
Price Editable	No
Product Configuration Type	
▼ Advanced Settings	
Component Code	16
Component Code Position	20



Configured Code Pattern

Update Product Options for AP-MBAIR

▼ Optional SKU Information	
Product Code	RAM8GB
Product Name	RAM 8GB
Product Description	
▼ Advanced Settings	
Component Code	8
Component Code Position	20
▼ Optional SKU Information	
Product Code	SSD128
Product Name	SSD Hard Drive 128GB
Product Description	
▼ Advanced Settings	
Component Code	128
Component Code Position	30



Key Concepts

Configured Code Pattern

Understand the required fields to set up dynamically generated skus

Also be familiar with Package Product Description

Related Knowledge Base Articles:

- [Package Product Code](#)
- [Package Product Description](#)



Option Constraints

Option Constraints

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

A: Create an option constraint!

Benefits:

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

Constraint Use Cases

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

Option Constraint Use Cases

2

1

3

Networking

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00	WIFIROUTER	WiFi Router	\$100.00
<input type="checkbox"/>	1.00	WIFIAP	WiFi Access Point	\$50.00
<input type="checkbox"/>	1.00	WIFIINSTALL	WiFi Installation	\$300.00

Subscriptions

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/>	1.00	WARRANTY	Warranty	\$0.00
<input type="checkbox"/>	1.00	LDWARRANTY	Loss and Damage Warranty	\$0.00
<input type="checkbox"/>	1.00	EXDPREMIUM	Extended Premium Support	\$100.00

Option Constraint Fields

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

Build and Learn

WiFi installation requires WiFi Router

Create Option Constraint

Option for Installation

Information | = Required Information

Constraint Name	WiFi installation requires WiFi Router	Active	<input checked="" type="checkbox"/>
Constrained Option	PO-000019	Configured SKU	IT Professional Pack
Constraining Option	PO-000017	Type	Dependency
Check Prior Purchases		Option Constraint Group	

Option for Router

Build and Learn

WiFi Access Point requires WiFi Router

Create Option Constraint

Option for Access Point

Information ■ = Required Information

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

Active Configured SKU Type Option Constraint Group

Option for Router

Build and Learn

Only one warranty may be selected

Create Option Constraint

Information ! = Required Information

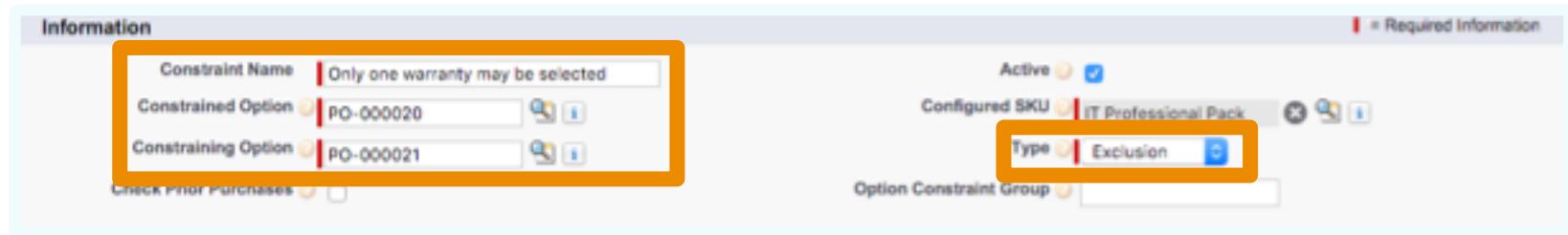
Constraint Name	Only one warranty may be selected
Constrained Option	PO-000020
Constraining Option	PO-000021

Active

Configured SKU IT Professional Pack

Type Exclusion

Option Constraint Group



Exercise 6

Create Option Constraints



Option Constraint Grouping Use Case

Networking		
QUANTITY	PRODUCT CODE	PRODUCT NAME
<input checked="" type="checkbox"/>	1.00	WIFIROUTER
<input type="checkbox"/>	1.00	WIFIAP
<input type="checkbox"/>	1.00	WIFIINSTALL

Subscriptions		
QUANTITY	PRODUCT CODE	PRODUCT NAME
<input type="checkbox"/>	1.00	WARRANTY
<input type="checkbox"/>	1.00	LDWARRANTY
<input type="checkbox"/>	1.00	MS-OFFICE365
<input type="checkbox"/>	1.00	CLOUDSTORAGE
<input type="checkbox"/>	20.00	ADMINHOUR

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

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

Build and Learn

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

Create First Option Constraint

Option for Cloud Storage

Information ! = Required Information

Constraint Name	Cloud Storage requires WiFi Router
Constrained Option	PO-000095
Constraining Option	PO-000189

Active Configured SKU Type

Option Constraint Group

Check Prior Purchases

Option for Router

Build and Learn

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

Create Second Option Constraint

Option for Cloud Storage

Information

= Required Information

Constraint Name	Cloud Storage requires WiFi Access Points
Constrained Option	PO-000095
Constraining Option	PO-000190

Active

Configured SKU

Type Dependency

Option Constraint Group Cloud

Option for Access Point

Exercise 7

Create Option Constraint with Grouping



Key Concepts

Option Constraints

Understand key fields to set up Option Constraints

- Difference between Constrained and Constraining options
- Difference between Type: Dependency and Type: Exclusion

A common error is to forget to activate the constraint

Understand how to set up Option Constraint Groups and how it transforms Option Constraints logic from OR to an AND

Try 'Check Prior Purchases' which can verify Constraining Options of past purchases, will avoid creating product rules

Related Knowledge Base Articles:

- [Adding Option Constraints](#)



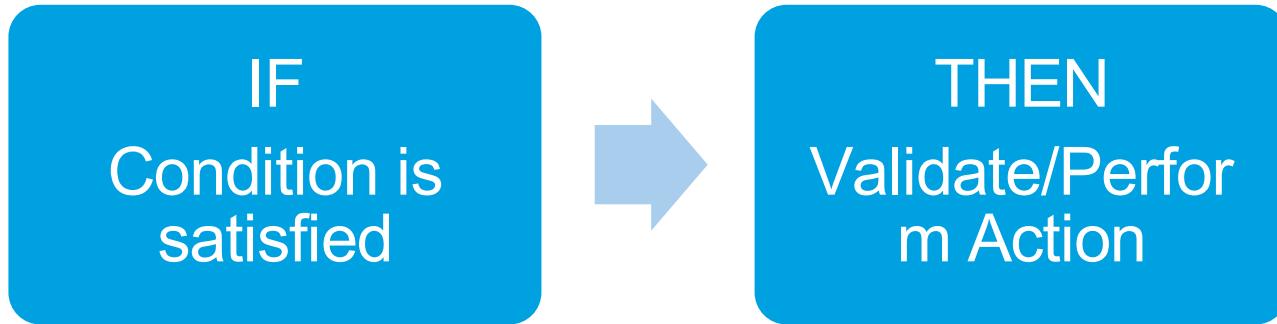
Q: Product A and Product Z are represented as two Product Options within the same bundle. Product A is required before Product Z is selected in the bundle. If a CPQ admin wants to create an option constraint what field should Product Z be stored as?

- A. Constrained Option
- B. Constraining Option
- C. Product Feature
- D. Price Rule

Product Rules

Product Rules

Product related rule driven by an IF/THEN structure



Product Rule Use Cases

1. Automatically add the Maintenance Kit and Toner Cartridge options to the ITPROPACK bundle when a the LJ Printer is selected
 - IF LJ Printer is selected THEN automatically add the Maintenance Kit and Toner Cartridge options
2. Validate toner quantity to be greater than or equal to the number of printers sold
 - SUM number of printers and number of toners
 - IF Toner Quantity is less than Printer Quantity THEN present a corrective message
3. Alert and Validations

Product Rule Fields

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

Product Rule Fields

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

Error Condition Fields (IF)

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

Product Action Fields (THEN)

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

Watch and Learn

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

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

- = User selected
- = Rule selected

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

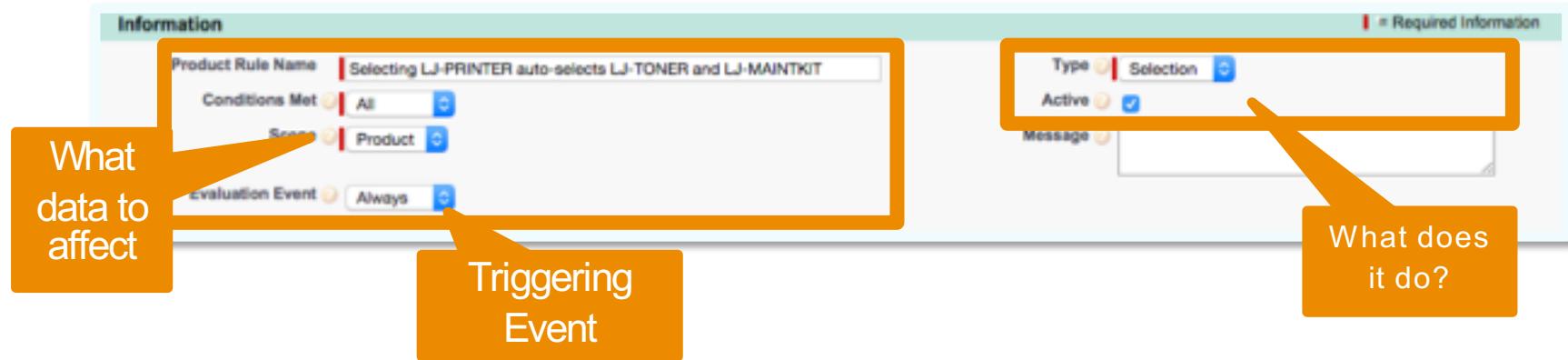
Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule



Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

Information ! = Required Information

Active <input checked="" type="checkbox"/>
Product <input type="radio"/> IT Professional Pack X S I
Product Rule <input type="radio"/> Selecting LJ-PRINTER as S
Product Feature <input type="radio"/> S I

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Error Condition

The screenshot shows the 'Information' and 'Filter Information' sections of a Product Rule setup screen.

Information Section:

- Rule: Selecting LJ-PRINTER as [dropdown]
- Tested Object: Product Option [dropdown]
- Tested Field: SBQQ_ProductCode_c [dropdown]

Filter Information Section:

- Operator: equals [dropdown]
- Filter Type: Value [dropdown]
- Filter Value: LJ-PRINTER

Both the 'Information' and 'Filter Information' sections are highlighted with orange boxes.

Can test Fields,
Summary
Variables, or
Configuration

Attributes against
other data

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Actions — the “THEN” in a Product Rule

The image displays two screenshots of the Salesforce Product Rule creation interface. Both screenshots show a rule named "Selecting LJ-PRINTER a". The "Type" is set to "Add", the "Product" is "LaserJet Toner Cartridge", and the "Required" checkbox is checked. An orange box highlights this configuration in both cases.

Relates to a Product record (Or other Product data)

Screenshot 1 (Top): The "Product" field is set to "LaserJet Toner Cartridge".

Screenshot 2 (Bottom): The "Product" field is set to "LaserJet Maintenance K".

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Update Product Option



Exercise 8

Printer Options Product Rule

Exercise 9

Toner Quantity Validation



Key Concepts

Product Rule Assembly Process

Understand Product Rule Detail

- Types, Scope, Evaluation Event

Understand Configuration Rule

- Importance of assigning to a Product

Understand Product Rule Error Conditions

- Difference between Tested Object, Field and Variable vs Filter Types, Value, and Variables
- How to incorporate the use of Summary Variables

Understand Product Rule Actions

- Types
- Filter Options

Try:

- Creating an Alert
- Creating a Validation



Key Concepts

Product Rule Assembly Process (continued)

Related Knowledge Base Articles:

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



Q: A CPQ Admin wishes to prevent users from selecting a Product Option when a conflicting one has been chosen. The Product Options that should not be selected should also not be displayed to the users. Which Product Selection Rule Type should be used for the Product Action?

- A. Hide
- B. Hide and Remove
- C. Disable and Remove
- D. Disable

Configuration Attributes

Configuration Attributes

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

A: Create a configuration attribute!

Benefits:

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

Configuration Attributes

Q-00012

Configure Products

Print

Location: ✓ --None--

United States
United Kingdom

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

Config Attribute Fields

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

Config Attribute Fields

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

Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

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

Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

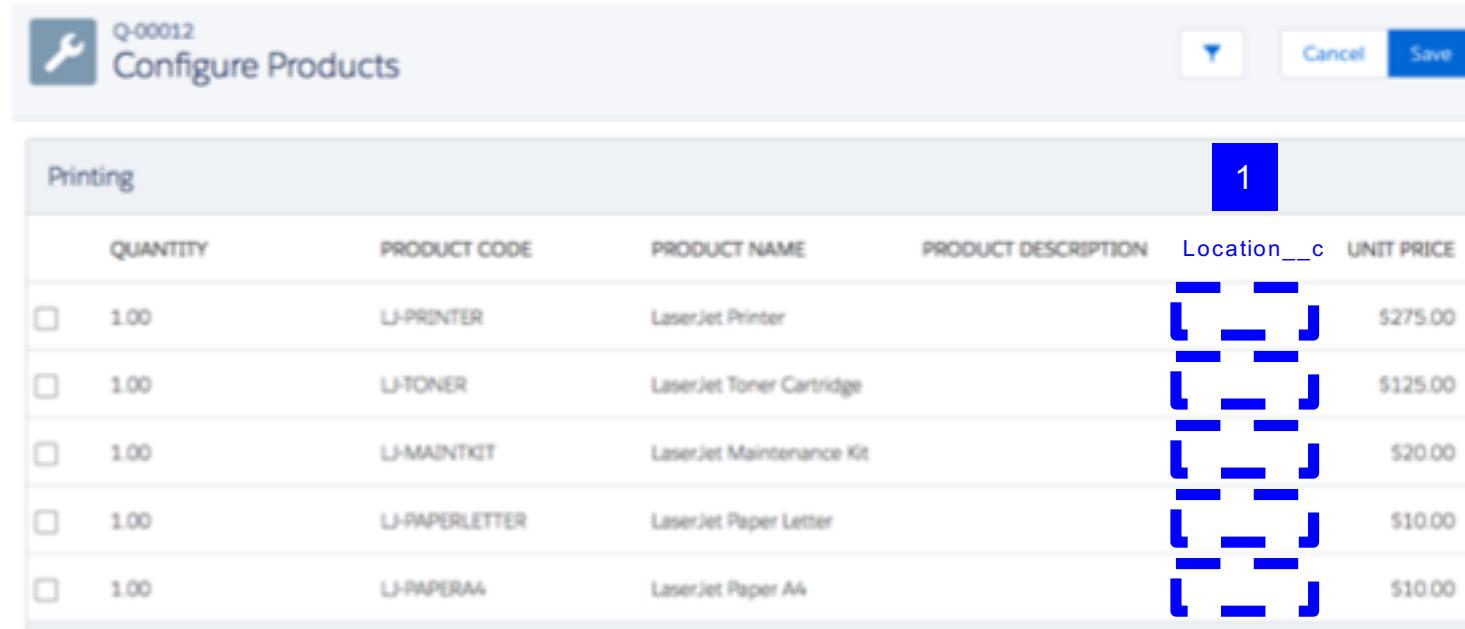
- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

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

Create Product Option picklist fields

Make a Location field available for use in any bundle



The screenshot shows a Salesforce page titled "Q-00012 Configure Products". At the top right are "Cancel" and "Save" buttons. A blue box highlights the number "1" in the top right corner of the table header. The table has columns: QUANTITY, PRODUCT CODE, PRODUCT NAME, PRODUCT DESCRIPTION, Location__c, and UNIT PRICE. Each row contains a checkbox, a product code, a name, a description, a blue redacted location field, and a price. The prices are \$275.00, \$125.00, \$20.00, \$10.00, and \$10.00 respectively.

Printing					1
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	Location__c	UNIT PRICE
<input type="checkbox"/>	LJ-PRINTER	LaserJet Printer			\$275.00
<input type="checkbox"/>	LJ-TONER	LaserJet Toner Cartridge			\$125.00
<input type="checkbox"/>	LJ-MAINTKIT	LaserJet Maintenance Kit			\$20.00
<input type="checkbox"/>	LJ-PAPERLETTER	LaserJet Paper Letter			\$10.00
<input type="checkbox"/>	LJ-PAPERA4	LaserJet Paper A4			\$10.00

Create Product Option picklist fields

Make a Location field available for use in any bundle

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

3. (

Standard Fields					
Action	Field Label	Field Name	Data Type	Controlling Field	54
Created By	Created By	CreatedBy	Lookup(User)		
Last Modified By	Last Modified By	LastModifiedBy	Lookup(User)		
Option Name	Name	Name	Auto Number		
Edit	Owner	Owner	Lookup(User, Queue)		

Custom Fields & Relationships					
Action	Field Label	API Name	Installed Package	Data Type	Indexed
Edit	Apply Immediately	SBQQ__AppliedImmediately__c	SteelBrick CPQ	Checkbox	Controlling Field

Phone
 Picklist
 Picklist (Multi-Select)

Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.

Next Cancel



Create Product Option picklist fields

Make a Location field available for use in any bundle

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label i

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

United States
United Kingdom



Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

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

Create Config Attribute

Make a Location__c picklist visible on the IT PRO PACK bundle

The screenshot shows the 'Configure Products' page for a bundle named 'Q-00012'. A blue box highlights the 'Location__c' picklist field, which contains options like 'None', 'United States', and 'United Kingdom'. A blue arrow labeled 'AUTOMAPPING' points from this field to a 'Target Field' box containing the same 'Location__c' label. The main table lists product details such as Product Code, Name, Description, and Unit Price.

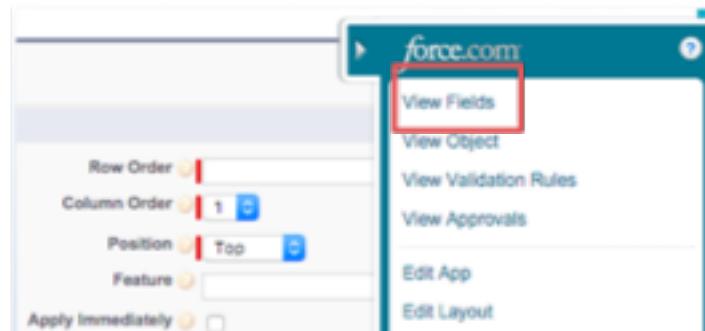
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
1.00	LJ-PRINTER	LaserJet Printer		\$275.00
1.00	LJ-TONER	LaserJet Toner Cartridge		\$125.00
1.00	LJ-MAINTKIT	LaserJet Maintenance Kit		\$20.00
1.00	LJ-PAPERLETTER	LaserJet Paper Letter		\$10.00
1.00	LJ-PAPERA4	LaserJet Paper A4		\$10.00

Create Config Attribute

Make a Location__c picklist visible on the IT PRO PACK bundle

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

The screenshot shows a Salesforce interface for managing Configuration Attributes. At the top, there are two entries: "Cloud Storage requires WiFi Router" and "Cloud Storage requires WiFi Access Points". Below this is a section titled "Configuration Attributes" with a "New Configuration Attribute" button. A message "No records to display" is shown. On the right, there is a "Configuration Attributes Help" link.



Create Config Attribute

Make a Location__c picklist visible on the IT PRO PACK bundle

8. Click the Target Field link

The screenshot shows a list of configuration items. The third item in the list has its 'Target Field' link highlighted with a red box. The list includes:

Action	Name	Type	Default Value	Modified By	Modified Date
Edit	Row Order	SBOQ__DisplayOrder__c	SteelBrick.CPQ Number(3, 0)	Brian Cloutier	1/15/2016 8:35 AM
Edit	Show Values	SBOQ__ShowValues__c	SteelBrick.CPQ Long Text Area(5000)	Brian Cloutier	1/15/2016 8:35 AM
Edit Replace	Target Field	SBOQ__TargetField__c	SteelBrick.CPQ Picklist	Brian Cloutier	1/15/2016 8:35 AM

Below the list, there is a section titled 'Related Lookup Filters' with the sub-instruction 'No related lookup filters defined.'

- 8.

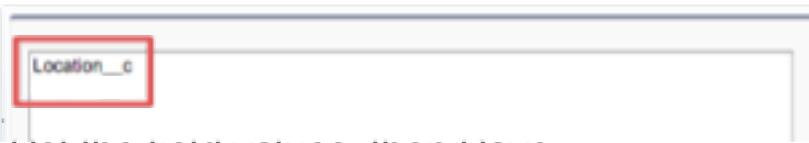
The screenshot shows a list of values for a configuration attribute. The 'New' button at the top of the list is highlighted with a red box. The list includes:

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

Create Config Attribute

Make a Location__c picklist visible on the IT PRO PACK bundle

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

10.  ab and refresh the page
11. Set the field values, then Save

Information Required Information

Attribute Name <input type="text" value="Location (ITPROPACK)"/>	Row Order <input type="text" value="10"/>
Product <input type="text" value="IT Professional Pack"/>	Column Order <input type="text" value="1"/>
Target Field <input type="text" value="Location__c"/>	Position <input type="text" value="Top"/>
Required <input checked="" type="checkbox"/>	Feature <input type="text"/>
Auto-Select <input type="checkbox"/>	Apply Immediately <input checked="" type="checkbox"/>
Apply To Product Options <input type="checkbox"/>	

Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

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

Create Quote Line picklist fields

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

The screenshot shows a Salesforce quote creation interface. At the top, there's a header with a shopping cart icon, the quote ID 'Q-00012', and buttons for 'Edit Quote', 'Add Hardware', 'Add Products', 'Add Group', 'Delete Lines', 'Quick Save', 'Calculate', 'Cancel', and 'Save'. Below the header is a section titled 'Quote Information' with fields for 'Start Date' (set to 9/27/2017), 'Subscription Term' (set to 3), and 'Target Customer Amount' (left empty). The main area is a table of quote items:

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

SUBTOTAL: \$1,510.00

QUOTE TOTAL: \$1,510.00

Create Quote Line picklist fields

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

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

14. Click New in Custom Fields & Relationships

13

Standard Fields							Standard Fields Help
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History	
	Created_By	CreatedBy	Lookup(User)				<input type="checkbox"/>
	Last_Modified_By	LastModifiedBy	Lookup(User)				<input type="checkbox"/>
	Line Name	Name	Auto Number		<input checked="" type="checkbox"/>		<input type="checkbox"/>

Custom Fields & Relationships							Custom Fields & Relationships Help	
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit	Additional_Discount	SBQQ__AdditionalDiscount__c	SteelBrick_CPK	Formula (Currency)			Brian Cloutier 1/15/2016 8:35 AM	<input type="checkbox"/>

Phone

Picklist

Picklist (Multi-Select)

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Next Cancel



Create Quote Line picklist fields

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

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

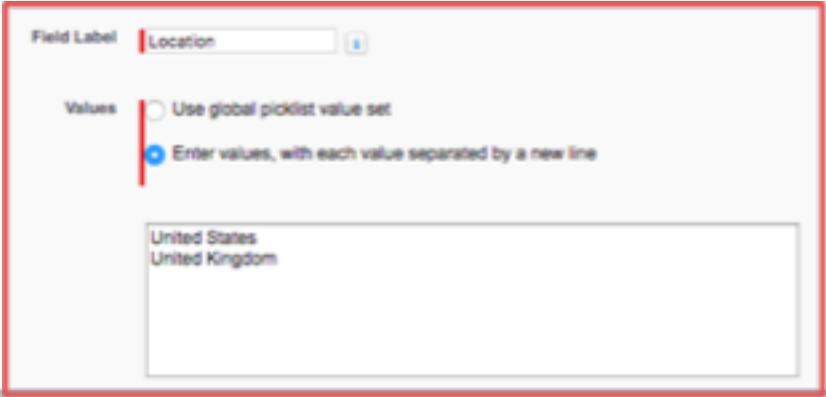
Field Label: Location

Values:

Use global picklist value set

Enter values, with each value separated by a new line

United States
United Kingdom



Automapping

Automapping

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

The screenshot shows the 'Configure Products' interface in Salesforce. At the top, there is a toolbar with a wrench icon, the identifier 'Q-00012', and two dropdown arrows. Below the toolbar, the title 'Configure Products' is displayed. A dropdown menu is open over a column labeled 'Location'. The menu items are '--None--', 'United States', and 'United Kingdom'. The table below lists four products: 'LJ-PRINTER', 'LJ-TONER', 'LJ-MAINTKIT', and 'LJ-PAPERLETTER', each associated with a quote line number '1.00' and a unit price of '\$275.00', '\$125.00', '\$20.00', and '\$10.00' respectively. The 'CODE' column contains redacted values.

CODE	PRODUCT NAME	Location__c	UNIT PRICE
LJ-PRINTER	LaserJet Printer	[REDACTED]	\$275.00
LJ-TONER	LaserJet Toner Cartridge	[REDACTED]	\$125.00
LJ-MAINTKIT	LaserJet Maintenance Kit	[REDACTED]	\$20.00
LJ-PAPERLETTER	LaserJet Paper Letter	[REDACTED]	\$10.00

Automapping

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

Configure Products

Q-00012

Printing

Location United States

AUTOMAPPING

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



Automapping

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

Q-00012
Configure Products

Cancel Save

Printing

Location United States ▾

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

Q-00012
Edit Quote

#	PRODUCT NAME	QUANTITY	Location__c
1	IT Professional Pack	1.00	[REDACTED]
2	Apple MacBook Pro	1.00	[REDACTED]
3	CPU 2.2GHz i7	1.00	[REDACTED]
4	RAM 8GB	1.00	[REDACTED]
5	SSD Hard Drive 256GB	1.00	[REDACTED]

AUTOMAPPING



Key Concepts

Configuration Attribute Assembly Process

3 step process

- Product Option picklist
- Create Configuration Attribute (note how to position with or without of a Feature)
- Quote Line picklist

Understand the concept of Automapping

- Configuration Attributes with same API name can be repurposed across other bundled products

Try checking 'Apply to Product Options' on the Configuration Attribute to confirm it saves to quote line

Related Knowledge Base Articles:

- [Configuration Attributes](#)
- [Auto-Mapping \(Twin Fields\)](#)



Exercise 10

Configuration Attribute



Product Rule with Configuration Attribute

Product Rule with Configuration Attribute Use Cases

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

Watch and Learn

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

Q-00012

Configure Products

Printing

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

US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

Create Actions

- Reveals US product options and hides UK product options

US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

Create Actions

- Reveals US product options and hides UK product options

US Items Product Rule

Implementation Process Overview

Create Product Rule and create Configuration Rule

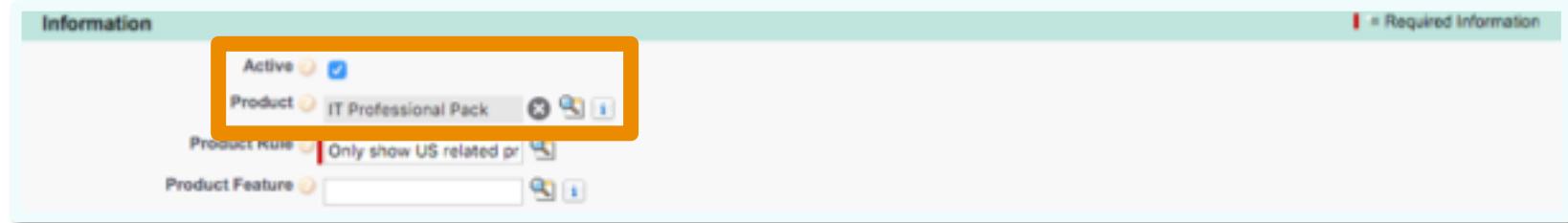
Information ! = Required Information

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

US Items Product Rule

Implementation Process Overview

Create Product Rule and create Configuration Rule



US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

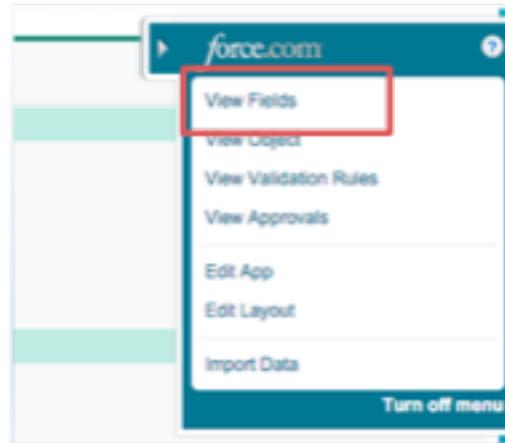
Create Actions

- Reveals US product options and hides UK product options

US Items Product Rule

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

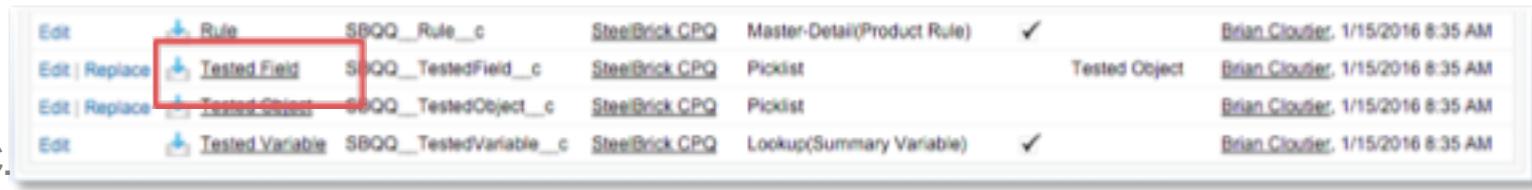
A. Click New Error Condition in Error Conditions



US Items Product Rule

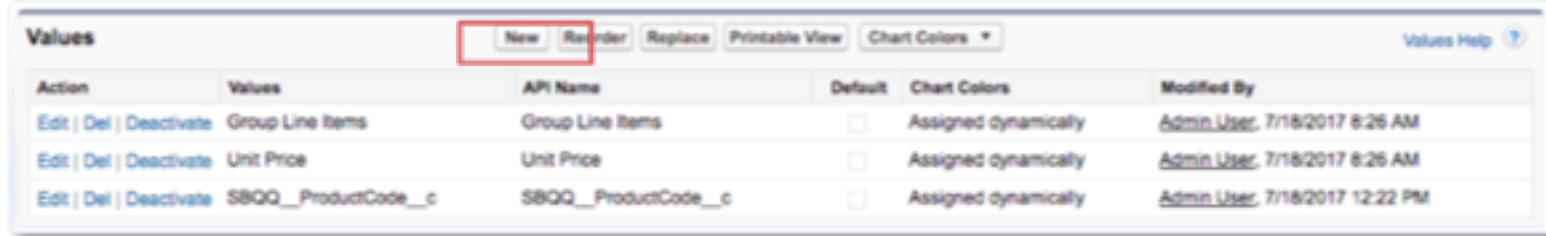
Important Note: Add API Name Location__c to Tested Field Pick List first

C. Click the Tested Field link



Edit	Rule	SBOQ_Rule_c	SteelBrick CPQ	Master-Detail(Product Rule)	✓	Brian.Cloutier, 1/15/2016 8:35 AM
Edit Replace	Tested Field	SBOQ_TestedField_c	SteelBrick CPQ	Picklist	Tested Object	Brian.Cloutier, 1/15/2016 8:35 AM
Edit Replace	Tested Object	SBOQ_TestedObject_c	SteelBrick CPQ	Picklist		Brian.Cloutier, 1/15/2016 8:35 AM
Edit	Tested Variable	SBOQ_TestedVariable_c	SteelBrick CPQ	Lookup(Summary Variable)	✓	Brian.Cloutier, 1/15/2016 8:35 AM

C.

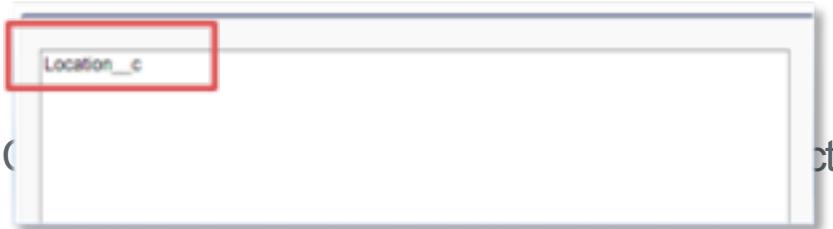


Values		New	Render	Replace	Printable View	Chart Colors	Values Help
Action	Values	API Name	Default	Chart Colors	Modified By		
Edit Del Deactivate	Group Line Items	Group Line Items	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM		
Edit Del Deactivate	Unit Price	Unit Price	<input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

US Items Product Rule

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

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



E. Configuration Attribute

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

US Items Product Rule

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

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

Click button to include or exclude selected values from the dependent picklist:					
Include Values Exclude Values					
Showing Columns: 1 - 5 (of 6) < Previous Next > View All Go to					
Tested Object:	Quote	Quote Line	Quote Line Group	Product Option	Configuration Attributes
Tested Field:	Group Line Items	Group Line Items	Group Line Items	Group Line Items	Group Line Items
	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price
	SBQQ_ProductCode__c	SBQQ_ProductCode__c	SBQQ_ProductCode__c	SBQQ_ProductCode__c	SBQQ_ProductCode__c
	Location__c	Location__c	Location__c	Location__c	Location__c

G.

H. Return to the original Error Condition tab and refresh

I. Location__c should now appear in the Tested Field pick list

Information

Rule Only show US related pr

Tested Object Configuration Attributes

Tested Field Location__c

Tested Attribute

Tested Variable

US Items Product Rule

Implementation Process Overview

Create Error Condition

The screenshot shows the 'Information' and 'Filter Information' sections of a Product Rule configuration screen.

Information Section:

- Rule: Only show US related or
- Tested Object: Configuration Attributes
- Tested Field: Location__c

Filter Information Section:

- Operator: equals
- Filter Type: Value
- Filter Value: United States

US Items Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when configuration attribute is United States

Create Actions

- Reveals US product options and hides UK product options

US Items Product Rule

Implementation Process Overview

Create Actions

Information ■ = Required Information

Rule ! Only show US related or

Type ! Show

Product ! LaserJet Paper Letter

Required



Information ■ = Required Information

Rule ! Only show US related or

Type ! Hide & Remove

Product ! LaserJet Paper A4

Required



US Items Product Rule

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

EX12: UK Items Product Rule

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



The screenshot shows the 'Product Rule Preview' screen in Salesforce. At the top left is a blue icon representing a document or rule. To its right is the title 'Product Rule Preview'. On the far right are two buttons: 'Clone' and 'Cancel', with 'Clone' being highlighted by a thick orange border. Below the title, there are three main sections: 'Error Condition (1)', 'Product Action (4)', and 'Configuration Rule (1)'. Each section has a dropdown arrow icon at its right end.

Exercise 11 & 12

US and UK Items Product Rule



Key Concepts

Product Rule with Configuration Attribute

Understand Importance of setting 'Apply Immediately' to trigger action

Understand Product rule Error Conditions

- Nested IFs needed for creation of separate rules (ie. for locations JP or BR)
- Every action has a reaction (ie. hiding will require unhiding if condition is reverted)

Understand how Filter Fields can be used in the Product Action

Try using a formula fields in a Product Rule

Related Knowledge Base Articles:

- [Product Actions](#)
- [Configuration Attributes](#)
- [Configuration Selection Rules](#)
- [Hiding Options in Configurator](#)



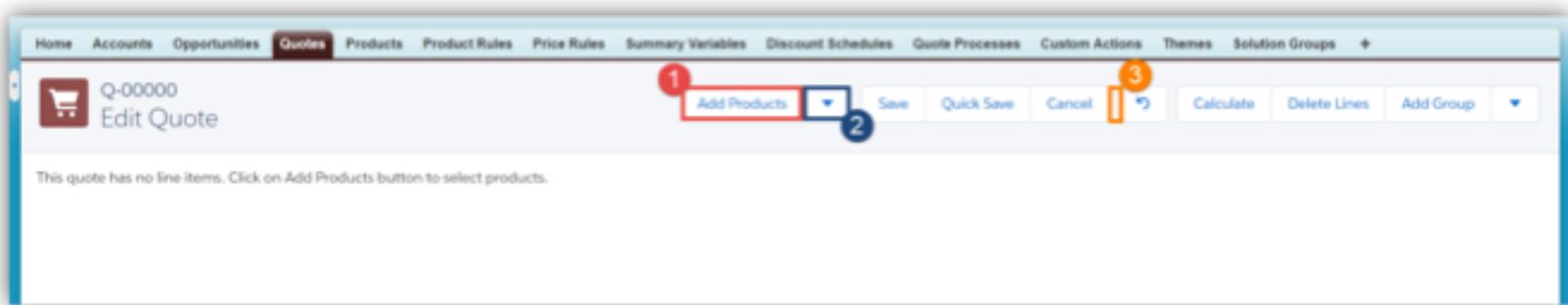
Q: The CPQ Admin has created a Configuration Attribute on the Product A bundle, and now needs an identical Configuration Attribute on the Product Z bundle that saves its value into the same Quote Line field. Which tasks should the CPQ Admin complete to meet this business requirement?

- A. Create a second Product Option field with identical values, then create a second Configuration Attribute on Product Z.
- B. Create a second Configured Product record for Product Z on the existing Configuration Attribute.
- C. Create a second Configuration Attribute on Product Z, no further administration required.
- D. Check “Apply to Product Options” on the existing Configuration Attribute, then make Product Z an option of Product A.

Custom Actions

What are Custom Actions?

1. Buttons
2. Menus
3. Separators



Custom Actions – Configuration

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

 Q-00000
Configure Products ▼ Save Cancel

Apple MacBook Pro

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



Custom Actions – Quote Line Editor

Demo

Page ⓘ Quote Line Editor
Location ⓘ Quote
Action ⓘ Save

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

 Q-00000
Edit Quote

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

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



Custom Actions – Quote Line Groups

Demo

Page Quote Line Editor
Location Quote/Group
Action Add Products

The screenshot shows the Salesforce quote editor interface. At the top, there's a navigation bar with Home, Accounts, Opportunities, Quotes (selected), Products, Product Rules, Price Rules, Summary Variables, Discount Schedules, Quote Processes, Custom Actions, Themes, Solution Groups, and a more button. Below the navigation is a toolbar with Save, Quick Save, Cancel, a magnifying glass icon, Calculate, Delete Lines, Add Group, and Ungroup buttons. On the left, there's a sidebar with a shopping cart icon and the quote number Q-00000. The main area displays two quote line groups:

- Group1:** Contains a description "Click to edit description." and a note "This group has no line items. Click on Add Products button or drag lines from other groups." It features an "Add Products" button, an "Optional" checkbox, and an "Additional Disc. (%)" input field.
- Group2:** Contains a description "Click to edit description." and a note "This group has no line items. Click on Add Products button or drag lines from other groups." It features an "Add Products" button, an "Optional" checkbox, and an "Additional Disc. (%)" input field.

Two large blue arrows point to the "Add Products" buttons in both groups.



Add Hardware Products Custom Action Use Case

Q-00009

Quote Line Editor

Add Hardware Add Products Save Quick Save Cancel

Calculate Delete Lines Add Group

Q-00009

Product Selection

24 Products Found

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

Filter X

Product Name

Product Code

Apply Clear Fields



Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

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

Create Search Filters

- Filters determine how users refine their searches for products



Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

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

Create Search Filters

- Filters determine how users refine their searches for products



Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

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

Create Search Filters

- Filters determine how users refine their searches for products



Add Hardware Products Custom Action

Implementation Process Overview

Create Custom Action Record

Information

Name: Add Hardware	Active: <input checked="" type="checkbox"/>
Display Order: 10	Default: <input type="checkbox"/>
Type: Button	URL Target: None
Parent Custom Action:	URL:

Layout

Page: Quote Line Editor	Icon: None
Location: Quote/Group	Label: Add Hardware
Action: Add Products	Description:

Open the Force.com Quick Access Menu to add Label



Add Hardware Products Custom Action

Implementation Process Overview

Create New Labels

- Labels determine the text overlay a user sees

Create Custom Action Record

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

Create Search Filters

- Filters determine how users refine their searches for products



Add Hardware Products Custom Action

Implementation Process Overview

Create first two Search Filters

Information ■ = Required Information

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

Information ■ = Required Information

Filter Name <input type="text" value="Product Code"/>	Display Order <input type="text" value="20"/>
Target Object <input type="text" value="Product"/> <input type="button" value="..."/>	Filter Value <input type="text"/>
Target Field <input type="text" value="Product Code"/> <input type="button" value="..."/> <input type="button" value="i"/>	Hidden <input type="checkbox"/>
Operator <input type="text" value="starts with"/> <input type="button" value="..."/>	Action <input type="text" value="Add Hardware"/> <input type="button" value="..."/>



Hardware Products Custom Action

Implementation Process Overview

Create third Search Filter

Information ! = Required Information

Filter Name <input type="text" value="Product Family"/>	Display Order <input type="text" value="30"/>
Target Object <input type="text" value="Product"/> <input type="button" value="..."/>	Filter Value <input type="text" value="Hardware"/>
Target Field <input type="text" value="Product Family"/> <input type="button" value="..."/> <input type="button" value="?"/>	Hidden <input checked="" type="checkbox"/>
Operator <input type="text" value="equals"/> <input type="button" value="..."/>	Add Hardware <input type="button" value="..."/> <input type="button" value="Search"/>

Prevents search filter from UI



EX16: Add Hardware Products Custom Action

Q-00009

Quote Line Editor

Add Hardware Add Products Save Quick Save Cancel

Calculate Delete Lines Add Group

Q-00009

Product Selection

24 Products Found

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

Filter Product Name Product Code



Dynamic Custom Action – Non-New Business Quote

Implementation Process Overview

The screenshot shows a quote creation page in Salesforce. On the left, there are several input fields:

- Quote Number: Q-00003
- Primary: ✓
- Status: Draft
- Expires On: 3/1/2017
- Sales Rep: Nicholas Thorndyke
- Primary Contact: (button)
- Subscription Term: 12
- Delivery Method: (button)
- Master Contract: (button)
- Approval Status: (button)
- Submitted Date: (button)
- Include Bundles:

A blue arrow points from the "Include Bundles" checkbox to a list of quote metadata fields on the right:

- Opportunity: New Bus.
- Net Amount: \$0.00
- Customer Amount: \$0.00
- Regular Amount: \$0.00
- List Amount: \$0.00
- Type: Amendment
- Payment Terms: Net 30
- Start Date: 2/18/2017
- Quote Process Id: (button)

Below the main quote area, there are two sections:

- Discount Information:**
 - Additional Disc. (%): (button)
 - Avg. Customer Disc. (%): 0.0%
 - Total Customer Disc. Amount: \$0.00
- Quote Options:**
 - Group Line Items:
 - Print Line Items:

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



Key Concepts

Custom Actions and Search Filters

Great way to quickly show a subset of products

Custom Actions assembly process

- Hidden checkbox prevents field from showing on UI

Try:

- Dynamic Custom Actions
- Conditional Search Filters

Related Knowledge Base Articles:

- [Custom Actions](#)
- [Conditional Custom Action](#)
- [Search Filters](#)



Guided Selling

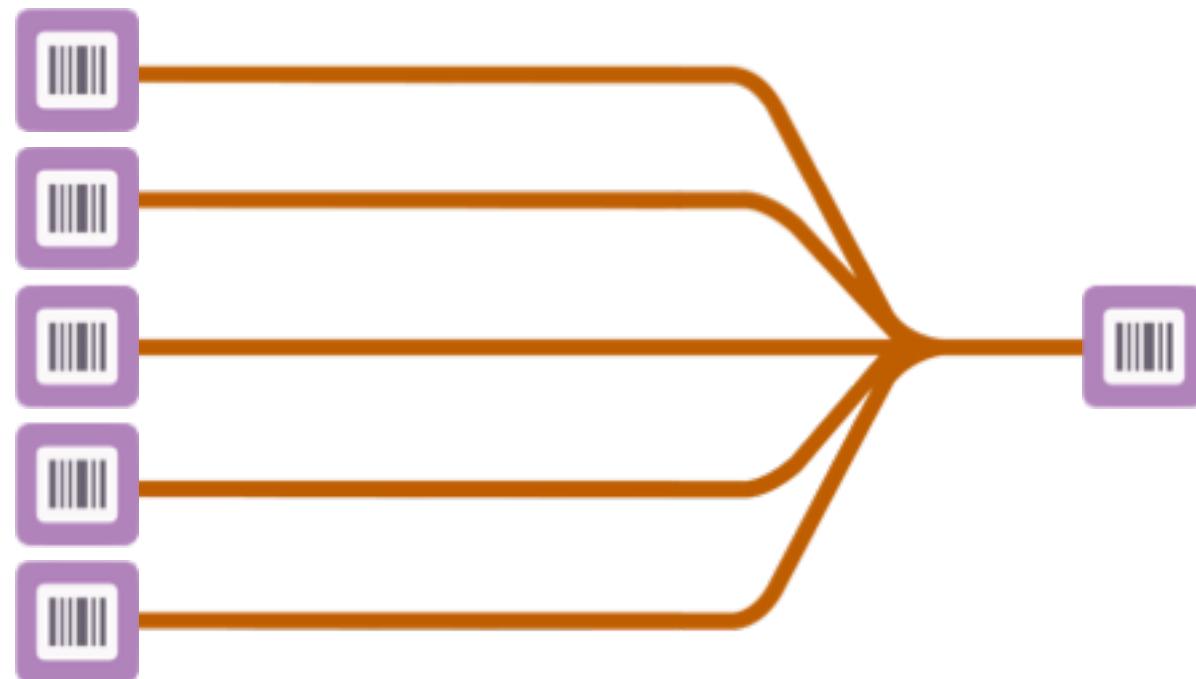
WHAT IS GUIDED SELLING?

 Guided selling is a way to filter products based on user input.



Questions as Filters

Answers to a series of questions drive which products can be selected by users



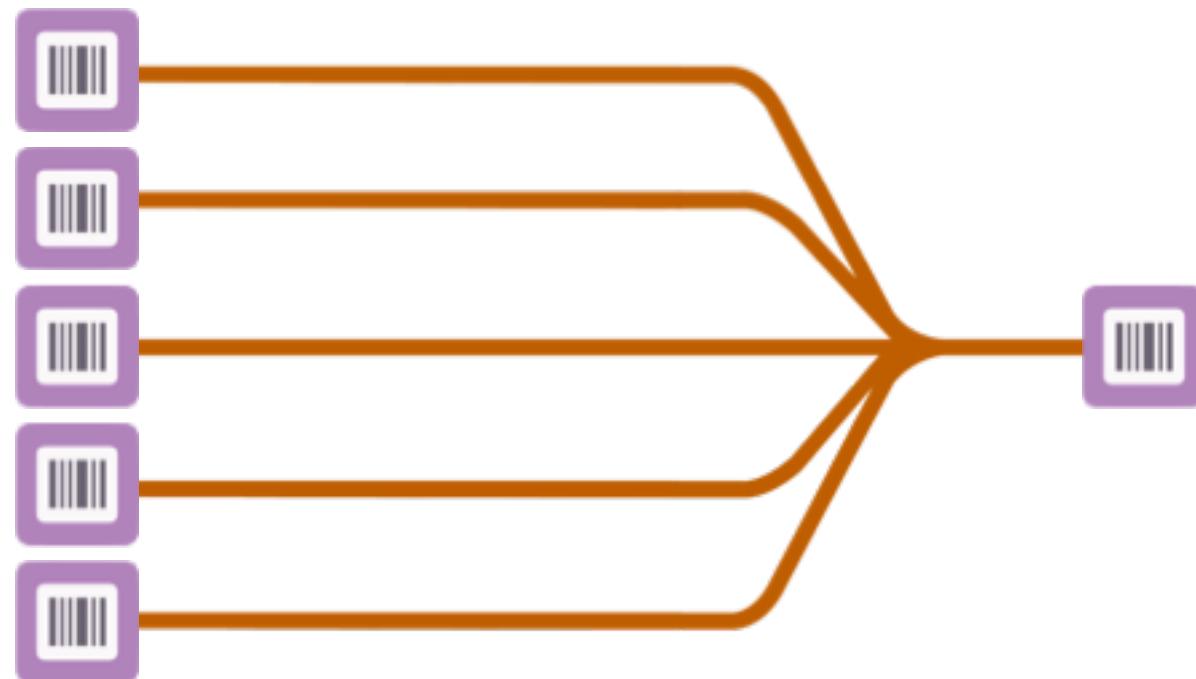
WHAT IS GUIDED SELLING?

 Guided selling is a way to filter products based on user input.



Branching Logic

Conditional logic determines which questions appear based on answers to previous questions.

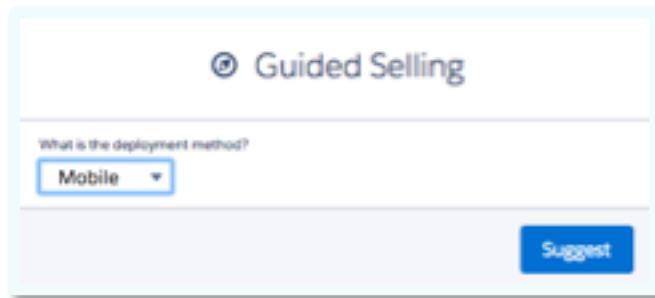


Watch and Learn

A guided selling process to assist the sales rep in selecting the appropriate IT Pack based on responses to three simple questions has been built out

Product	Deployment Type?	Deployment Setting?	Number of Users?
IT Pro Pack	Onsite	Commercial	1-100; 101-500
IT Starter Pack	Onsite	Commercial	1-100
IT Mobile Pack	Mobile		
IT Corporate Pack	Onsite	Commercial	1-100; 101-500; 501+
IT Education Pack	Onsite	Academic	

Guided Selling Use Case



The screenshot shows a "Product Selection" interface with the identifier Q-00011. It displays one product found: "ITMOBILEPACK" (Product Code), "IT Mobile Pack" (Product Name), "Service" (Product Family), "IT Mobile Pack" (Product Description), and "\$0.00" (List Price). The interface includes a toolbar with a star icon, a downward arrow, a refresh icon, and buttons for "Select", "Select & Add More", and "Cancel".

<input type="checkbox"/>	PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input type="checkbox"/>	ITMOBILEPACK	IT Mobile Pack	Service	IT Mobile Pack	\$0.00

Guided Selling Use Case

The screenshot illustrates a guided selling process. At the top, a sidebar shows deployment settings: "Onsite" for deployment method and "Academic" for deployment setting. A "Suggest" button is present. Below this, a modal window titled "Product Selection" displays one result: Q-00011, ITEDUPACK, IT Education Pack, Service, \$0.00.

What is the deployment method?

Onsite

What is the deployment setting?

Academic

Suggest

Q-00011

Product Selection

1 Products Found

<input type="checkbox"/> PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input type="checkbox"/> ITEDUPACK	IT Education Pack	Service		\$0.00

★ ↴ ⌂ Select Select & Add More Cancel

Guided Selling Use Case

② Guided Selling

What is the deployment method?

Onsite ▾

What is the deployment setting?

Commercial ▾

Number of Users:

1-100 ▾

Q-00011

Product Selection

3 Products Found

<input type="checkbox"/> PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input type="checkbox"/> ITSTARTERPACK	IT Starter Pack	Service		\$0.00

★ ▾ ⌂ Select Select & Add More Cancel

Guided Selling Use Case

② Guided Selling

What is the deployment method?

Onsite ▾

What is the deployment setting?

Commercial ▾

Number of Users:

501+ ▾

Q-00011

Product Selection

1 Products Found

★

▼

⌚

Select

Select & Add More

Cancel

<input type="checkbox"/> PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input type="checkbox"/> ITCORPPACK	IT Corporate Pack	Service		\$0.00

Guided Selling

Implementation Process Overview

Create Product fields

- Makes fields that are used to filter during guided selling process

Update Product fields

- Sets values for the new fields in IT pack products

Create Process Input fields

- Makes mirror fields to store values selected during guide selling

Create Quote Process and Process Inputs

- Links new product fields with guided selling prompts

Guided Selling

Implementation Process Overview Continued



Create Process Input Conditions

- Allows for dynamic display of guided selling input fields

Guided Selling

Implementation Process Overview

Create Product fields

- Makes fields that are used to filter during guided selling process

Update Product fields

- Sets values for the new fields in IT pack products

Create Process Input fields

- Makes mirror fields to store values selected during guide selling

Create Quote Process and Process Inputs

- Links new product fields with guided selling prompts

Guided Selling

Implementation Process Overview

Create Product fields

Step 2. Enter the details Step 2 of 4

Field Label Deployment Type 

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

Onsite
Mobile

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

Field Name Deployment_Type 



Guided Selling

Implementation Process Overview

Create Product fields

Step 2. Enter the details Step 2 of 4

Field Label Deployment Setting 

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

Commercial
Academic

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

Field Name Deployment_Setting 



Guided Selling

Implementation Process Overview

Create Product fields

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label Number of Users 

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


1-100
101-500
501+

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



Guided Selling

Implementation Process Overview

Create Product fields

- Makes fields that are used to filter during guided selling process

Update Product fields

- Sets values for the new fields in IT pack products

Create Process Input fields

- Makes mirror fields to store values selected during guide selling

Create Quote Process and Process Inputs

- Links new product fields with guided selling prompts

Guided Selling

Implementation Process Overview

Update Product fields

Product Detail		Edit	Delete	Clone	Clone With Related	Translate
Product Name	IT Professional Pack	Active <input checked="" type="checkbox"/>				
Product Code	ITPROPACK	Product Family Service				
Product Family Filter	Service					
Is Bundle	Yes					
Deployment Type	Onsite					
Deployment Setting	Commercial					
Number of Users	1-100; 101-500					

Guided Selling

Implementation Process Overview

Update Product fields

Product	Deployment Type	Deployment Setting	Number of Users
IT Pro Pack	Onsite	Commercial	1-100; 101-500
IT Starter Pack	Onsite	Commercial	1-100
IT Mobile Pack	Mobile		
IT Corporate Pack	Onsite	Commercial	1-100; 101-500; 501+
IT Education Pack	Onsite	Academic	

Guided Selling

Implementation Process Overview

Create Product fields

- Makes fields that are used to filter during guided selling process

Update Product fields

- Sets values for the new fields in IT pack products

Create Process Input fields

- Makes mirror fields to store values selected during guide selling

Create Quote Process and Process Inputs

- Links new product fields with guided selling prompts

Guided Selling

Implementation Process Overview

Create Process Input fields

Step 2. Enter the details Step 2 of 4

Field Label Deployment Type 

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

Onsite
Mobile 

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

Field Name Deployment_Type 

Guided Selling

Implementation Process Overview

Create Process Input fields

Step 2. Enter the details Step 2 of 4

Field Label Deployment Setting 

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


Commercial
Academic

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

Field Name Deployment_Setting 

Guided Selling

Implementation Process Overview

Create Process Input fields

Step 2. Enter the details Step 2 of 4

Field Label Number of Users 

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


1-100
101-500
501+

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



Guided Selling

Implementation Process Overview

Create Product fields

- Makes fields that are used to filter during guided selling process

Update Product fields

- Sets values for the new fields in IT pack products

Create Process Input fields

- Makes mirror fields to store values selected during guide selling

Create Quote Process and Process Inputs

- Links new product fields with guided selling prompts

Guided Selling

Implementation Process Overview

Create Quote Process and Process Inputs

Information		■ = Required Information	
Process Name	IT Pack Guided Selling		
Default	<input checked="" type="checkbox"/>	Owner	Admin User
Auto Select Product?	<input checked="" type="checkbox"/>	Product Configuration Initializer	<input type="text"/>
Guided Only	<input checked="" type="checkbox"/>	Product Search Executor	<input type="text"/>
		Sort Order	<input type="text"/>

Guided Selling

Implementation Process Overview

Create Quote Process and Process Inputs

Process Input Edit

Save Save & New Cancel

Information ! = Required Information

<p>Input Name <input type="text" value="Deployment Type"/></p> <p>Label <input type="text" value="What is the deployment method?"/></p> <p>Display Order <input type="text" value="10"/></p> <p>Default Field <input type="text" value="--None--"/></p>	<p>Active <input checked="" type="checkbox"/></p> <p>Quote Process <input type="text" value="IT Pack Guided Selling"/></p> <p>Input Field <input type="text" value="Deployment_Type__c"/></p> <p>Conditions Met <input type="text" value="All"/></p>
---	--

Product Filter

<p>Product Field <input type="text" value="Deployment_Type__c"/></p>	<p>Operator <input type="text" value="equals"/></p>
--	---

Guided Selling

Implementation Process Overview

Create Quote Process and Process Inputs

Process Input Edit

Save Save & New Cancel

Information ! = Required Information

<p>Input Name <input type="text" value="Deployment Setting"/></p> <p>Label <input type="text" value="What is the deployment setting?"/></p> <p>Display Order <input type="text" value="20"/></p> <p>Default Field <input type="text" value="--None--"/></p>	<p>Active <input checked="" type="checkbox"/></p> <p>Quote Process <input type="text" value="IT Pack Guided Selling"/></p> <p>Input Field <input type="text" value="Deployment_Setting__c"/></p> <p>Conditions Met <input type="text" value="All"/></p>
---	---

Product Filter

<p>Product Field <input type="text" value="Deployment_Setting__c"/></p>	<p>Operator <input type="text" value="equals"/></p>
---	---

Guided Selling

Implementation Process Overview

Create Quote Process and Process Inputs

Process Input Edit

Save Save & New Cancel

Information

Input Name: Number of Users
Label: Number of Users
Display Order: 30

Active:
Quote Process: IT Pack Guided Selling
Input Field: Number_of_Users_c
Conditions Met: All

Product Filter

Product Field: Number_of_Users_c
Operator: contains

= Required Information

The screenshot shows the 'Process Input Edit' interface in Salesforce. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Below this is a section titled 'Information' with the following fields:

- Input Name: Number of Users
- Label: Number of Users
- Display Order: 30

Below the 'Information' section is a note: '= Required Information'. To the right of this note is another section with the following fields:

- Active:
- Quote Process: IT Pack Guided Selling
- Input Field: Number_of_Users_c
- Conditions Met: All

At the bottom of the screen is a 'Product Filter' section with the following fields:

- Product Field: Number_of_Users_c
- Operator: contains

Guided Selling

Implementation Process Overview



Create Process Input Conditions

- Allows for dynamic display of guided selling input fields

Guided Selling

Implementation Process Overview

Update Product fields

Product	Deployment Type	Deployment Setting	Number of Users
IT Pro Pack	Onsite	Commercial	1-100; 101-500
IT Starter Pack	Onsite	Commercial	1-100
IT Mobile Pack	Mobile		
IT Corporate Pack	Onsite	Commercial	1-100; 101-500; 501+
IT Education Pack	Onsite	Academic	

Guided Selling

Implementation Process Overview

Create Process Input Conditions

Process Input Condition Edit

Save Save & New Cancel

Information ! = Required Information

Process Input Conditions Name: Active

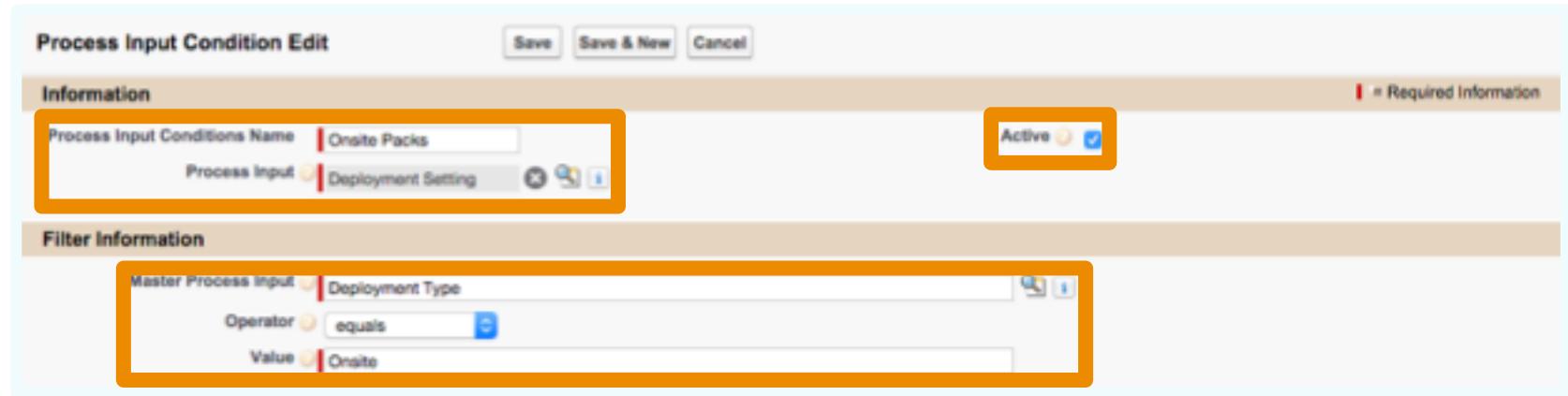
Process Input:

Filter Information

Master Process Input:

Operator:

Value:



Guided Selling

Implementation Process Overview

Update Product fields

Product	Deployment Type	Deployment Setting	Number of Users
IT Pro Pack	Onsite	Commercial	1-100; 101-500
IT Starter Pack	Onsite	Commercial	1-100
IT Mobile Pack	Mobile		
IT Corporate Pack	Onsite	Commercial	1-100; 101-500; 501+
IT Education Pack	Onsite	Academic	

Guided Selling

Implementation Process Overview

Create Process Input Conditions

Process Input Condition Edit

Save Save & New Cancel

Information ! = Required Information

Process Input Conditions Name: Commercial Packs

Process Input: Number of Users X  

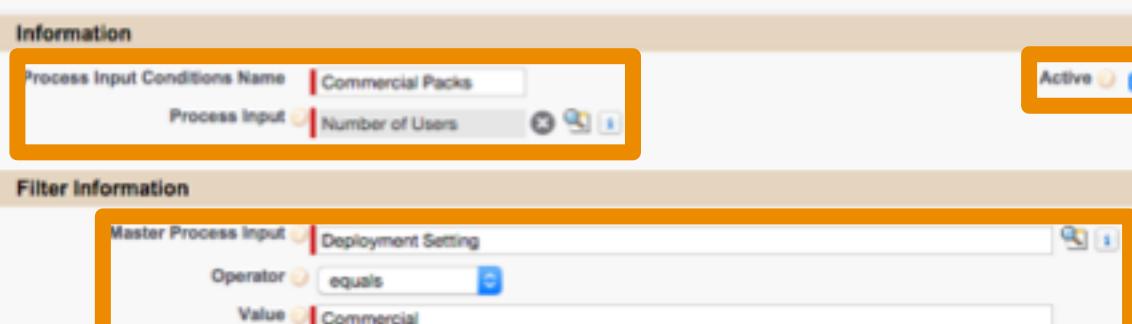
Active 

Filter Information

Master Process Input: Deployment Setting

Operator: equals  

Value: Commercial



Build and Learn

Create a Guided Selling process that prompts the user to select Deployment Method, Deployment Setting, and Number of Users by pasting the ID to the quote

Test the Guided Selling process with a sample quote

Quote Detail		Save	Cancel
Quote Number	Q-00001	Opportunity	First Big Sale
Primary	<input checked="" type="checkbox"/>	Net Amount	\$0.00
Status	Draft	Customer Amount	\$0.00
Expires On	6/15/2016	Regular Amount	\$0.00
Sales Rep	Admin User	List Amount	\$0.00
Primary Contact		Type	Quote
Subscription Term	12	Payment Terms	Net 30
Delivery Method		Start Date	6/1/2016
Master Contract		Quote Process Id	a0g36000001Wvae 

Exercise 20

Guided Selling



Key Concepts

Guided Selling

Ideal implementation scenario for Guided Selling is if you have to ask multiple general questions
Understand the Guided Selling assembly process

- Create Product fields
- Update the Products
- Create twin Process Input fields (automapping)
- Create Quote Process and Process Inputs
- Create Input Conditions
 - Paste Quote Process ID to field on the Quote

Related Knowledge Base Articles:

- [Guided Selling Overview](#)
- [Guided Selling Use Case \(basic\)](#)
- [Guided Selling Use Case \(advanced\)](#)
- [Building Workflow to Map Quote Process](#)



Q: Bulington textiles in various shapes and sizes. Their product catalog contains three textiles: Wool, Cotton, Nylon in widths ranging from 100ft to 200 ft and lengths from 500ft to 1000 ft. The CPQ Admin wants to setup a guided selling process to streamline the time it takes for Users to make product selections, which object should the CPQ Admin create fields to store details about table values?

- A. Quote Process
- B. Process Input
- C. Lookup Object
- D. Product
- E. Quote Line

PRICING AND DISCOUNTS

- 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.



Call to Action

Focus on skill & knowledge related to exam objectives



Quote Line Editor

Helpful Pricing Fields

Q-00025
Quote Line Editor

Save Quick Save Cancel Add Products Calculate Delete Lines Groups

Edit Line Editor Fieldset on Quote

Quote Information

	#	Product Code	Product Name	Quantity	List Unit Price	Regular Unit Price	Unit Cost	Markup	Additional Disc.	Net Unit Price	Net Total				
<input type="checkbox"/>	1	AP-MBPRO	Apple MacBook Pro	1.00	\$1,500.00	\$1,500.00				\$1,500.00	\$1,500.00				
<input type="checkbox"/>	2	CPU22GHZI7	↳ CPU 2.2GHz i7	1.00	Included	\$0.00	Included			\$0.00	\$0.00				
<input type="checkbox"/>	3	RAM8GB	↳ RAM 8GB	1.00	Included	\$0.00	Included			\$0.00	\$0.00				
<input type="checkbox"/>	4	SSD256	↳ SSD Hard Drive 256GB	1.00	Included	\$0.00	Included			\$0.00	\$0.00				

SUBTOTAL: \$1,500.00

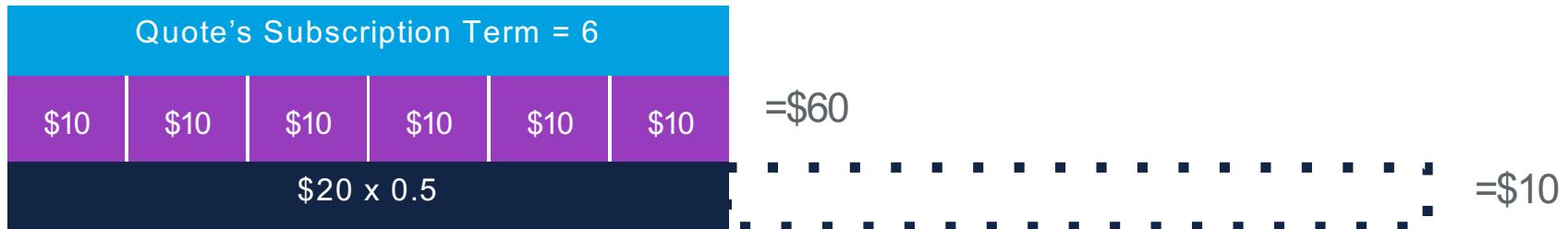
Quote TOTAL: \$1,500.00

Edit Line Fieldset on Quote Line

Subscriptions Products

Subscription Term & Proration

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



Pricing Waterfall

Pricing Structure

Standard Item
Subscription Item

Extended Price = Unit x Quantity

Extended Price = Unit x Quantity x Prorated Term

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

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



Q: For a quote with a Subscription Term of 24 months, what are the calculated prices for the standard pricing fields?

List Price \$50

Quantity 13

Default Subscription Term 6

Distributor Discount -5%

Partner Discount 50%

Additional Discount 10%

Discount Schedule 10%

- A. Regular Unit Price: \$45.00, Customer Unit Price: \$40.50, Partner Unit Price: \$20.25 Net Unit Price: \$ 21.26
- B. Regular Unit Price: \$90.00, Customer Unit Price: \$81.00, Partner Unit Price: \$40.50 Net Unit Price: \$ 42.53
- C. Regular Unit Price: \$180.00, Customer Unit Price: \$162.00, Partner Unit Price: \$81.00 Net Unit Price: \$ 85.05
- D. Regular Unit Price: \$180.00, Customer Unit Price: \$189.00, Partner Unit Price: \$170.10 Net Unit Price: \$ 153.09

Pricing Structure

Original Price		\$50.00
List Price <small>(in this case a subscription product)</small>	Unit Price x Probate Multiplier = \$50 x 4 <small>(Probate Multiplier = Quote Term/Subscription Term)</small>	\$200.00
- System Discounts	Discount Schedules	10%
Regular Price (*)		\$180.00
- Additional Discount	Discretionary discount entered by the sales rep	10%
Customer Price		\$162.00
- Partner Discount		50%
Partner Price		\$81.00
- Distributor Discount		-5%
Net Price	Goes into Pipeline/Forecast Amount	\$85.05

Salesforce CPQ

Fast Path to CPQ Specialist Certification

Day 1

Salesforce CPQ Overview

High level CPQ overview

Products and Bundles

Product setup, Bundle Structure

Option Constraints, Configuration

*Attributes, Product Rules,
Guided Selling, Custom
Actions*

Pricing and Discounts

*Pricing Waterfall, Pricing Methods,
MDQ*

Day 2

Pricing and Discounts

Pricing Rules

Quote Templates

*Template Content and Sections, Line
Item Columns, Quote Terms*

Contracting Process

*Contract Creation, Amendments,
Renewals*

CPQ Platform

Package Settings, Debugging

Implementation Methodology

PRE-REQUISITES

Qualified attendees will need to have completed the following:

- Trailhead
 - ✓ Sales Cloud Platform: Quick Look
 - ✓ Salesforce CPQ Basics
- Salesforce Sales Cloud Certification (Required)
- Completion of a CPQ self-led class on Partner Community:
 - ✓ CPQ201 (Recommended)
 - ✓ CPQ211 (Preferred)

Post Workshop Requirements:

- STUDY! Review articles in the CPQ Specialist Study Guide
- Complete CPQ211 and Knowledge Check
- Register and take the CPQ Specialist Certification Exam!



Discount Schedules

Discount Schedules

Volume Discount

- Discounts based on quantity

Term Discount (multi-year discount)

- Discounts based on number of months

Cost Discount

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

Discount Schedule Overview

Automatically apply discounts based on quantity



Discount Schedule Overview

Automatically apply discounts based on term length

\$1.00 per unit per year



\$0.80 per unit per year



Discount Schedule Fields

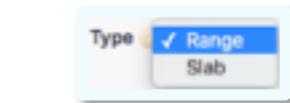
Field	Description
Schedule Name	Enter a meaningful name for the discount schedule.
Type	<ul style="list-style-type: none">Range: Discounted at the rate of whatever tier applies to the quote quantity.Slab: Discounted at the blended rate of whatever tier applies to the quoted quantity and all preceding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

Discount Schedule Fields

Field	Description
Cross Products	<ul style="list-style-type: none">Aggregates quantities of all products using this schedule for the purpose of volume discount calculation. Slab discounts cannot be used for Cross Product discounts
Cross Orders	<ul style="list-style-type: none">Extends volume discounts on total volume owned by customer (i.e. quantity quoted plus prior purchases)
Override Behavior	<ul style="list-style-type: none">Determines if current Discount Tier that the product falls within is editable, if all Discount Tiers are editable , or none

Discount Schedule Variations

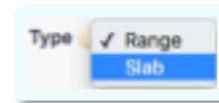
Type – Range vs Slab



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

10 units

\$11.76 total



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

10 units

\$11.96 total

Discount Schedule Variations

Aggregation Scope – None vs Quote

Add quantities of like products

Aggregation Scope --None--
 Product Quote
 Group

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



Aggregation Scope --None--
 Product Quote
 Group

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

Discount Schedule Variations

Aggregation Scope – Group

The screenshot displays a software interface for managing discount schedules. On the left, a sidebar shows the 'Aggregation Scope' dropdown set to 'Group'. The main area contains two sections: 'Alfa' and 'Beta', each with a table for managing products.

Alfa Section:

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

Beta Section:

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

Both sections include fields for 'Optional' (checkbox), 'Subscription Term' (text input), and 'Additional Disc. (%)' (text input).

Build and Learn

Create a Discount Schedule

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

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

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

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

Discount Schedule

Implementation Process Overview

Create Discount Schedule

- Defines a general purpose discount schedule

Create tiers

- Determines that price breaks occur at steps of 10 units

Associate Discount Schedule to a Product

- Leverages discount schedule on the LJ-PAPERLETTER product

Discount Schedule

Implementation Process Overview

Create Discount Schedule

- Defines a general purpose discount schedule

Create tiers

- Determines that price breaks occur at steps of 10 units

Associate Discount Schedule to a Product

- Leverages discount schedule on the LJ-PAPERLETTER product

Discount Schedule

Implementation Process Overview

Create Discount Schedule

Information ! = Required Information

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

Discount Schedule

Implementation Process Overview

Create Discount Schedule

- Defines a general purpose discount schedule

Create tiers

- Determines that price breaks occur at steps of 10 units

Associate Discount Schedule to a Product

- Leverages discount schedule on the LJ-PAPERLETTER product

Discount Schedule

Implementation Process Overview

Create tiers

Excluded value

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

Exercise 23

Create a Discount Schedule



Key Concepts

Discount Schedule

Anticipate Discount Schedule math problems on the exam

Understand the setup options

- Type, Discount Unit, Aggregation Scope
- Override Behavior picklist
- Cross Products/Cross Orders checkboxes

Understand Slab vs Range Discount calculations

Lower bound is inclusive, Upper bound is exclusive

Related Knowledge Base Articles:

- [Discount Schedules](#)
- [Edit Discount Schedules in the Quote Line Editor](#)
- [Allow Users to Edit Discount Schedules in the Quote Line Editor](#)



Q: Product A has a slab discount schedule with a list price of \$10.00.

Schedule Name	Discount Unit	Name	Lower	Upper	Discount
Hardware Maintenance Discount Schedule	Percent	1 - 10	1	11	2%
		11 - 20	11	21	5%
		21 +	21		10%

Based on this scenario what should the Net Total Price be for Product A if the user's order a quantity of 25?

- A. \$175.00
- B. \$238.00
- C. \$200.00
- D. \$225.00

Block Pricing

Watch and Learn

Block Pricing already built out for Toner Recycling Product

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

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

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

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

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

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

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

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

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Update Product Price Method

▼ SteelBrick Information

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

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

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

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Create tiers

Information ! = Required Information

Price Name <input type="text" value="1-20 Units"/>	Owner <input type="text" value="Admin User"/>
Lower Bound <input type="text" value="1"/>	Product <input type="text" value="Toner Recycling"/>
Upper Bound <input type="text" value="21"/>	Price Book <input type="text" value="Standard Price Book"/>
Price <input type="text" value="15.00"/>	

Information ! = Required Information

Price Name <input type="text" value="21-50 Units"/>	Owner <input type="text" value="Admin User"/>
Lower Bound <input type="text" value="21"/>	Product <input type="text" value="Toner Recycling"/>
Upper Bound <input type="text" value="51"/>	Price Book <input type="text" value="Standard Price Book"/>
Price <input type="text" value="25 .00"/>	

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

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

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Create special Block Price currency field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label i

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

Length Number of digits to the left of the decimal point

Field Name i

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

Block Pricing

Implementation Process Overview

Update Product Price Method

- Makes TONERRECYCLE product use Block Pricing

Create tiers

- Defines a price for two ranges of units

Create special Block Price currency field

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

Create Overage tier

- Defines the \$1 per unit overate rate

Block Pricing

Implementation Process Overview

Create Overage tier

Information ! = Required Information

Price Name	51+
Lower Bound	51
Upper Bound	
OverageRate	1.00

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

EX24: Block Pricing

Setup block pricing for the TONERRECYCLE product

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
	1	TONERRECYCLE	Toner Recycling	20.00	\$15.00		%	\$15.00	\$15.00			
	1	TONERRECYCLE	Toner Recycling	21.00	\$25.00		%	\$25.00	\$25.00			
	1	TONERRECYCLE	Toner Recycling	51.00	\$26.00		%	\$26.00	\$26.00			

Block Pricing with Discount Schedule

Block Pricing + Discount Schedule

An Alternative to Overage Rate

For the LTE Hotspot, the customer looks to institute the following pricing structure.

Quantity	Block Price	Discount Schedule	Overage based on Discount * List Price	Price
1 – 10 Units	\$1000.00			\$1000
11 – 20 Units	\$1500.00			\$1500
21 – 30 Units		52%	52% of \$125 = \$60	\$1500 + 60/unit
31 + Units		56%	56% of \$125 = \$55	\$1500 + 55/unit

Block Pricing + Discount Schedule

Create two Block Price Records

Block Price Detail

[Edit](#) [Delete](#) [Clone](#)

Price Name 1-10 Units

Owner Admin User [Change]

Lower Bound 1

Product LTE Hotspot

Upper Bound 11

Price Book Standard Price Book

OverageRate

Price USD 1,000.00

Block Price Detail

[Edit](#) [Delete](#) [Clone](#)

Price Name 11-20 Units

Owner Admin User [Change]

Lower Bound 11

Product LTE Hotspot

Upper Bound 21

Price Book Standard Price Book

OverageRate

Price USD 1,500.00

Block Pricing + Discount Schedule

Create one Discount Schedule with the following tiers

Discount Schedule Detail

Schedule Name	Block + Discount	Edit	Delete	Clone	Edit Tiers	Owner	Admin User [Change]
Type	Slab					Cross Products	<input type="checkbox"/>
Discount Unit	Percent					Cross Orders	<input type="checkbox"/>
Aggregation Scope	Quote					Include Bundled Quantities	<input type="checkbox"/>

[Edit Tiers](#) Block + Discount

[Edit Tiers](#) [Save](#) [Cancel](#)

#	Tier Name	Lower Bound	Upper Bound	Discount (%)
1	21 - 30	21.00	31.00	52.0000000000
2	31 +	31.00		56.0000000000

Block Price + Discount Schedule

Associate Discount Schedule to the appropriate Product

Product Detail			
Product Name	LTE Hotspot	Active	<input checked="" type="checkbox"/>
Product Code	LTEHOTSPOT	Product Family	Hardware
Product Family Filter	Hardware	Default Pricing Table	
Is Bundle	<input type="checkbox"/>		
Deployment Type			
Deployment Setting			
Requires Product Approval			
Created By	Admin User, 3/23/2017 7:09 AM	Last Modified By	Admin User, 5/10/2017 10:40 AM
Product Description			
Number of Users			
Salesforce CPQ Information			
Pricing Method	<input type="radio"/> Block	Pricing Method Editable	<input type="checkbox"/>
Quantity Editable	<input checked="" type="checkbox"/>	Exclude From Opportunity	<input type="checkbox"/>
Non-Discernible			
Discount Schedule	<input type="radio"/> Block + Discount	Asset Conversion	<input type="checkbox"/> One per unit
Cost Editable	<input type="checkbox"/>	Hidden	<input type="checkbox"/>
		Lock Description	<input type="checkbox"/>
		Optional	<input type="checkbox"/>

Multi Dimensional Quoting Use Case

YEAR								
	# ▶	PRODUCT CODE	PRODUCT NAME	ACTIVATION	YEAR 1	YEAR 2	YEAR 3	TOTAL
<input type="checkbox"/>	1 ▾	CLOUDSTORAGE	Cloud Storage 1GB	\$40.00	\$20.00	\$40.00	\$100.00	\$200.00
		Quantity		1.00	1.00	2.00	5.00	
		List Unit Price		\$40.00	\$20.00	\$20.00	\$20.00	
		Uplift		0.00	0.00	0.00	0.00	
		Additional Disc.		<input type="text"/> % ▾				
		Net Unit Price		\$40.00	\$20.00	\$20.00	\$20.00	
		Net Total		\$40.00	\$20.00	\$40.00	\$100.00	
		SUBTOTAL:		\$40.00	\$20.00	\$40.00	\$100.00	\$200.00

Key Concepts

Block Pricing

Block pricing is set pricing directly on the product
Using Overage vs Discount Schedules

Related Knowledge Base Articles:

- [Block Pricing](#)
- [Combine Block Pricing With Discount Schedules](#)



Pricing Methods

Pricing Methods

Common pricing methods are available out-of-the-box

- List Pricing
 - Subscription Products and Proration
 - Percent of Total
- Cost + Markup Pricing
- Block Pricing
- Block Pricing with optional overage rate and Discount Schedules
- Custom Pricing (“Special Price”)
- Multi Dimensional Quoting
- Contract Prices (Customer-Specific Price)



Cost and Margin

Cost and Margin

Pricing Method

- Set to Cost

Cost Object

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

Margin

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



Cost and Margin

Watch and learn

Product
 **Barracuda NextGen Firewall X300**

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

* [Back to List: Discount Schedules](#)

[Features \[0\]](#) | [Options \[0\]](#) | [Option Constraints \[0\]](#) | [Configuration Attributes \[0\]](#) | [Costs \[1\]](#) | [Block Prices \[0\]](#) | [Standard Price \[1\]](#) | [Price Dimensions \[0\]](#) | [Price Books \[0\]](#)

Product Detail

Product Name: Barracuda NextGen Firewall X300 Active:

Product Code: BA-FWX300 Product Family: Hardware

Salesforce CPQ Information

Pricing Method:  Cost Pricing Method Editable: 

Costs

New Cost 

Action	Cost #	Active	Unit Cost
Edit Del	COST-000028	<input checked="" type="checkbox"/>	\$2,100.00



Cost and Mark Up

Watch and learn

Quote Information

Start Date	<input type="text" value="5/1/2021"/>	End Date	<input type="text" value="4/30/2024"/>	Subscription Term	<input type="text"/>
Target Customer Amount	<input type="text"/>	Total Cost of Hardware Products	<input type="text" value="2,100.00"/>	Partner Level	
#	PRODUCT CODE	PRODUCT NAME	QUANTITY	UNIT COST	MARKUP
1	BA-PWX300	Barracuda NextGen Firewall X300	1.00	\$2,100.00	500.00 USD
					SUBTOTAL:
					\$2,600.00
					QUOTE TOTAL: \$2,600.00



Key Concepts

Cost and Margin

Best used when Sales User needs the ability to mark-up from cost

Pricing Method set to Cost

Cost is a related list entry on the Product

Markup is entered by Sales User on Quote Line UI

Related Knowledge Base Articles:

- [Cost and Markup Pricing](#)



Multi Dimensional Quoting

Multi Dimensional Quoting Use Case

YEAR							
	# ▶	PRODUCT CODE	PRODUCT NAME	ACTIVATION	YEAR 1	YEAR 2	YEAR 3
<input type="checkbox"/>	1 ▾	CLOUDSTORAGE	Cloud Storage 1GB	\$40.00	\$20.00	\$40.00	\$100.00 \$200.00
		Quantity		1.00	1.00	2.00	5.00
		List Unit Price		\$40.00	\$20.00	\$20.00	\$20.00
		Uplift		0.00	0.00	0.00	0.00
		Additional Disc.		%	%	%	%
		Net Unit Price		\$40.00	\$20.00	\$20.00	\$20.00
		Net Total		\$40.00	\$20.00	\$40.00	\$100.00
		SUBTOTAL:		\$40.00	\$20.00	\$40.00	\$100.00 \$200.00

Multi Dimensional Quoting

Implementation Process Overview

Create Price Dimensions

- Defines segments of one year and a one-time activation fee

Multi Dimensional Quoting

Create Price Dimensions

Information

Product: Cloud Storage 1GB

Dimension Name: Yearly Ramp (highlighted by red box)

Type: Year

Price Book:

Quantity Editable: Inherit

Default Quantity:

Quantity Scale:

Information

Product: Cloud Storage 1GB

Dimension Name: Activation (highlighted by red box)

Type: One-time (highlighted by red box)

Price Book:

Quantity Editable: Inherit

Default Quantity:

Quantity Scale:

Pricing

Unit Price: 40 (highlighted by red box)

Non Discouraged: Inherit

Price Editable: Inherit

Non Partner Discountable: Inherit

Multi Dimensional Quoting

Prorated Segment

Cloud Storage is an annual Subscription, Subscription Term = 12 Months

Start Date	6/1/2017	Subscription Term	36	Target Customer Amount	
Quote Line View	Standard	First Segment Term End Date			
YEAR					
#	PRODUCT CODE	PRODUCT NAME	ACTIVATION	YEAR 1	YEAR 2
1	CLOUDSTORAGE	Cloud Storage 1GB	USD 40.00	USD 20.00	USD 20.00
	QUANTITY	1.00	1.00	1.00	1.00
	LIST UNIT PRICE	USD 40.00	USD 20.00	USD 20.00	USD 20.00
	START DATE	6/1/2017	6/1/2018	6/1/2019	
	END DATE	5/31/2018	5/31/2019	5/31/2020	

Multi Dimensional Quoting

Prorated Segment

What if the Quote is 42 months?

Start Date	6/1/2017	Subscription Term	42	Target Customer Amount	
Start Date	End View	Standard	First Segment Term End Date		
YEAR					
#	PRODUCT CODE	PRODUCT NAME	ACTIVATION	YEAR 1	YEAR 2
1	CLOUDSTORAGE	Cloud Storage 1GB	USD 40.00	USD 20.00	USD 20.00
		QUANTITY	1.00	1.00	1.00
		LIST UNIT PRICE	USD 40.00	USD 20.00	USD 20.00
		START DATE		6/1/2017	6/1/2018
		END DATE		5/31/2018	5/31/2019
					11/30/2020

Multi Dimensional Quoting

Prorated Segment

What if we need the prorated partial segment as the first dimension?

Start Date	6/1/2017	Subscription Term	42	Target Customer Amount	
Quote Line View	Standard	First Segment Term End Date	11/30/2017		
YEAR					
#	PRODUCT CODE	PRODUCT NAME	ACTIVATION	YEAR 1	YEAR 2
1	CLOUDSTORAGE	Cloud Storage 1GB	USD 40.00	USD 10.00	USD 20.00
	QUANTITY	1.00		1.00	1.00
	LIST UNIT PRICE	USD 40.00		USD 20.00	USD 20.00
	START DATE		6/1/2017	12/1/2017	12/1/2018
	END DATE		11/30/2017	11/30/2018	11/30/2019
					11/30/2020

Exercise 25

Multi-Dimensional Quoting (MDQ)



Key Concepts

MDQ

Understand the MDQ assembly process

- Provide Dimension Name
- Select Type: time-based (Year, Quarter, Month, Custom) vs One-Time
 - Cannot create One-time dimension without first creating a time-based dimension

Understand when to use First Segment Term End Date

MDQ Type: Custom allows for users to define their own time periods provided its consecutive

- Package settings > 'Allow non-consecutive custom segments' is checked

Uplift can be removed from Segmented Line Editor field set if not needed



Key Concepts

MDQ (continued)

Default Pricing Table field determines if the MDQ product is display in standard or segmented view on the QLE

Price rules can be applied to MDQ by accessing Quote Line fields (ie. Segment Index)

Related Knowledge Base Articles:

- [Multi-Dimensional Quotina \(MDQ\)](#)
- [Set default appearance of MDQ products in Quote Line Editor](#)
- [Configure SteelBrick CPQ Package-Level Settings](#)



Contract Pricing

Watch and Learn

Set up Contract Pricing for Edge Communications

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



Pricing Structure

Standard Item
Subscription Item

Extended Price = Unit x Quantity

Extended Price = Unit x Quantity x Prorated Term

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

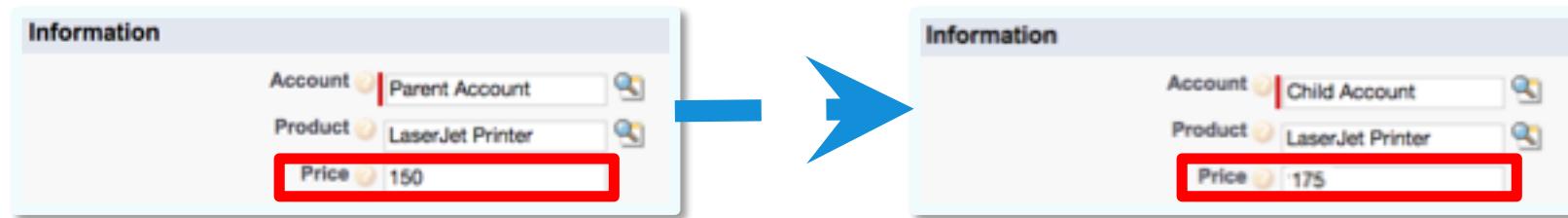
* Regular Price also represents **Special Price** or **Contracted Price** after Discount Schedules

Contracted Pricing Considerations

Parent – Child Accounts

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

- Establish a new Contracted Price Record on the Child Account



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

Account Detail	
Account Owner	Admin User [Change]
Account Name	Child Account [View Hierarchy]
Parent Account	Parent Account
Ignore Parent Contracted Prices	<input checked="" type="checkbox"/>
Account Number	

Key Concepts

Contract Pricing

Understand the Contract Pricing assembly process

- Discount Schedules can be assigned (highest precedent)

Inheritance options for Parent/Child accounts

Try: 'Generate Contracted Price' will auto-generate a contracted price when the Opportunity is Contracted

Related Knowledge Base Articles:

- [Contracted Pricing](#)
- [Manually Define Contracted Prices](#)
- [Automatically Create Contracted Prices](#)
- [Contracted Price Fields](#)



Q: The CPQ Admin wants to create a discount based Contract Pricing for a certain product for a specific amount of time upon contract activation, what three fields on the Contract Price record are necessary in order to meet this requirement?

- A. Effective Date
- B. Expiration Date
- C. Discount
- D. Segment
- E. Product

OUTLINE

Salesforce CPQ

Fast Path to CPQ Specialist Certification

Day 1

Salesforce CPQ Overview

High level CPQ overview

Products and Bundles

Product setup, Bundle Structure

Option Constraints, Configuration

*Attributes, Product Rules,
Guided Selling, Custom
Actions*

Pricing and Discounts

*Pricing Waterfall, Pricing Methods,
MDQ*

Day 2

Pricing and Discounts

Pricing Rules

Quote Templates

*Template Content and Sections, Line
Item Columns, Quote Terms*

Contracting Process

*Contract Creation, Amendments,
Renewals*

CPQ Platform

Package Settings, Debugging

Implementation Methodology

PRE-REQUISITES

Qualified attendees will need to have completed the following:

- Trailhead
 - ✓ Sales Cloud Platform: Quick Look
 - ✓ Salesforce CPQ Basics
- Salesforce Sales Cloud Certification (Required)
- Completion of a CPQ self-led class on Partner Community:
 - ✓ CPQ201 (Recommended)
 - ✓ CPQ211 (Preferred)

Post Workshop Requirements:

- STUDY! Review articles in the CPQ Specialist Study Guide
- Complete CPQ211 and Knowledge Check
- Register and take the CPQ Specialist Certification Exam!



Pricing Rules

Price Rule Overview

Similar Structure as a Product Rule

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

Inject a value into a Quote or Quote Line Field

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

Price Rule Fields

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

Price Rule Fields

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

Price Condition Fields (IF)

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

Price Condition Fields (IF)

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

Price Action Fields (THEN)

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

Summary Variables

Composite Operation

Composite Summary Variable

A Summary Variable with an additional calculation

- Add
- Subtract
- Multiply
- Divide

Calculate using

- Static Value
- Another Summary Variable

Summary Variables

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

Maintenance Kit Price Rule

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

Q-00000

Quote Line Editor

Save Quick Save Cancel Add Products Calculate Delete Lines Groups

Quote Information

Start Date	3/1/2016	Subscription Term	12	Target Customer Amount									
#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL			
<input type="checkbox"/>	1	LJ-MAINTKIT	LaserJet Maintenance Kit	4.00	\$20.00	\$20.00		%	\$20.00	\$80.00			
<input type="checkbox"/>	2	LJ-PRINTER	LaserJet Printer	2.00	\$275.00	\$275.00		%	\$275.00	\$550.00			

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Summary Variable

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

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Summary Variable

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

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

Information ! = Required Information

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

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Summary Variable

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

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Condition

Information

Price Rule: Set quantity of LJ-MAIN

Object: Quote Line

Field: Product Code

Tested Formula:

Filter Information

Operator: equals

Filter Type: Value

Filter Value: LJ-MAINTKIT

Filter Formula:

The screenshot shows the 'Information' and 'Filter Information' sections of a Salesforce Price Rule configuration page. In the 'Information' section, the 'Object' is set to 'Quote Line' and the 'Field' is set to 'Product Code'. In the 'Filter Information' section, the 'Operator' is set to 'equals' and the 'Filter Value' is set to 'LJ-MAINTKIT'. Both the 'Object/Field' and 'Operator/Filter Value' groups are highlighted with orange boxes.

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Summary Variable

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

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Summary Variable

Information ! = Required Information

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

Filter Information

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

Composite Information

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

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Summary Variable

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

Create Price Action

- Injects summary variable value into SBQQ__Quantity__c

Maintenance Kit Price Rule

Implementation Process Overview

Create Price Action

Information ! = Required Information

Target Object ! Quote Line

Target Field ! SBQQ__Quantity__c

Rule ! Set quantity of LJ-MAIN

Formula !

Price Action Sources

Source Field !

Source Lookup Field ! --None--

Source Variable ! Total quantity of LJ-PRINTER multiplied by 2

EX26: Maintenance Kit Price Rule

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

Q-00000

Quote Line Editor

Save Quick Save Cancel Add Products Calculate Delete Lines Groups

Quote Information

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

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

WiFi Access Point Price Rule

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

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
1	AP-MBPRO	Apple MacBook Pro	14.00	\$1,500.00	\$1,500.00			%	\$1,500.00	\$21,000.00	☆	★	●	◆
2	CPU22GHZI7	↳ CPU 2.2GHz i7	14.00	Included	\$0.00	Included			\$0.00	\$0.00	●			
3	RAMBGB	↳ RAM 8GB	14.00	Included	\$0.00	Included			\$0.00	\$0.00	●			
4	SSD256	↳ SSD Hard Drive 256GB	14.00	Included	\$0.00	Included			\$0.00	\$0.00	●			
5	WIFIAP	WiFi Access Point	2.00	\$60.00	\$60.00			%	\$60.00	\$120.00	☆	★	●	◆

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

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

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview Continued



Create second Price Action

- Injects ceiling formula result into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

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

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

Information ! = Required Information

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

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

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

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Condition

Information

Price Rule Set quantity of WiFiAP to Object: Quote Line
Field: Product Code

Tested Variant:

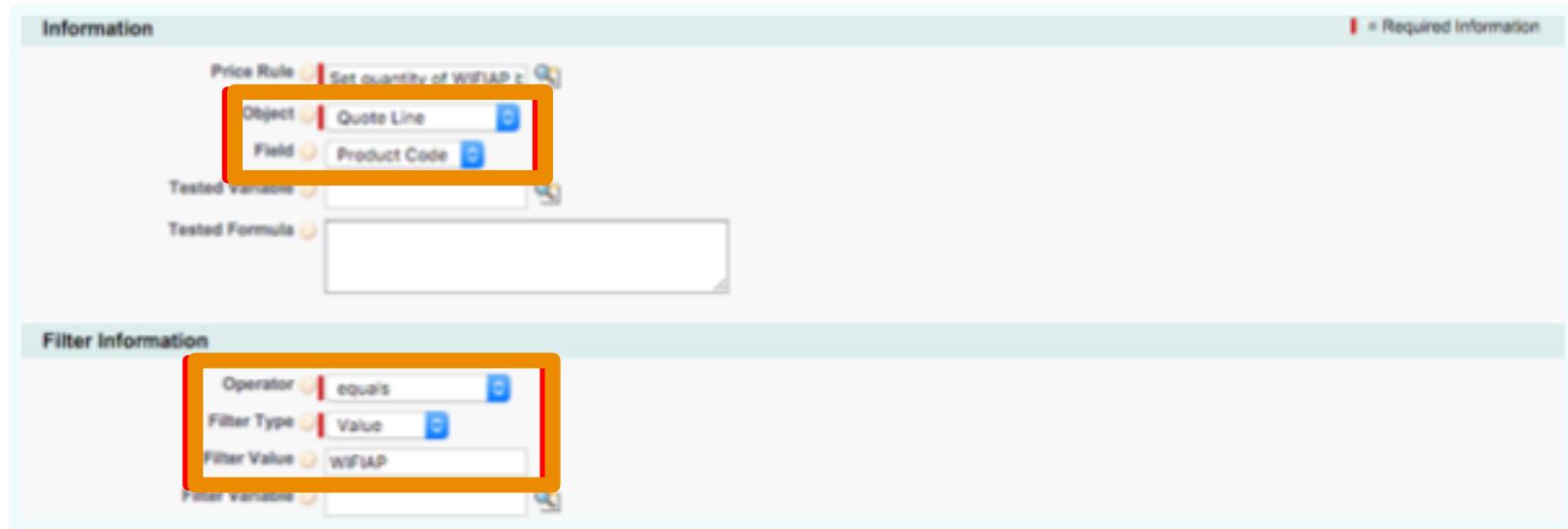
Tested Formula:

Filter Information

Operator: equals Filter Type: Value
Filter Value: WiFiAP

Filter Variant:

= Required Information



WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

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

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create Summary Variable

Information

Variable Name: Total quantity of AP-MBPRO divided by 12
Target Object: Quote Line

Aggregate Function: Sum
Aggregate Field: Quantity

Filter Information

Filter Field: Product Code
Filter Value: AP-MBPRO

Operator: equals

Composite Information

Composite Operator: Divide

Variable Element:
Value Element: 12

* = Required Information

WiFi Access Point Price Rule

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when WIFIAP line items are encountered

Create Summary Variable

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

Create first Price Action

- Injects summary variable value into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create first Price Action

Information ! = Required Information

Target Object ! <input type="text" value="Quote Line"/>	Rule ! <input type="text" value="Set quantity of WiFiAP to 12"/>
Target Field ! <input type="text" value="SBQQ__Quantity__c"/>	Order ! <input type="text" value="1"/>
Formula ! <input type="text"/>	

Price Action Sources

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

WiFi Access Point Price Rule

Implementation Process Overview



Create second Price Action

- Injects ceiling formula result into SBQQ__Quantity__c field

WiFi Access Point Price Rule

Implementation Process Overview

Create second Price Action

Information ! = Required Information

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

Price Action Sources

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



EX27: WiFi Access Point Price Rule

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

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL					
1	AP-MBPRO	Apple MacBook Pro	14.00	\$1,500.00	\$1,500.00			%	\$1,500.00	\$21,000.00	☆	✉	✉	✉	✉
2	CPU22GHZI7	↳ CPU 2.2GHz i7	14.00	Included	\$0.00	Included			\$0.00	\$0.00	❶				
3	RAMBGB	↳ RAM BGB	14.00	Included	\$0.00	Included			\$0.00	\$0.00	❶				
4	SSD256	↳ SSD Hard Drive 256GB	14.00	Included	\$0.00	Included			\$0.00	\$0.00	❶				
5	WIFIAP	WiFi Access Point	2.00	\$60.00	\$60.00			%	\$60.00	\$120.00	☆	✉	✉		

Total Cost of Hardware Use Case

Sum the net cost of all products in the Hardware family

<input type="checkbox"/>	#	Product Code	Product Name	Quantity	List Unit Price	Regular Unit Price	Unit Cost	Markup
<input type="checkbox"/>	1	ADMINHOUR	Admin Hour	1.00	\$75.00	\$1,800.00	\$60.00	
<input type="checkbox"/>	2	AP-REMOTEDesktop	Apple Remote Desktop	1.00	\$80.00	\$80.00	\$50.00	
<input type="checkbox"/>	3	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	\$1,000.00	\$900.00	
<input type="checkbox"/>	4	AP-USKEYBOARD	Apple US Keyboard	2.00	\$50.00	\$50.00	\$35.00	

Quote
Q-00011

[Approvals](#) | [Quote Lines](#) | [Quote Line Groups](#) | [Quote Details](#) | [Print](#)

Quote Detail

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

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

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

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview Continued



Create Price Action

- Injects variable value into Total_Cost_of_Hardware_Products__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

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

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

The screenshot shows the Salesforce formula builder interface. At the top, there is an example formula: "Gross Margin = Amount - Cost__c". Below it are two tabs: "Simple Formula" (selected) and "Advanced Formula". In the center, there is a text input field containing the formula "SBQQ__Cost__r.SBQQ__UnitCost__c * SBQQ__Quantity__c". This entire input field is highlighted with a thick orange border. To the left of the input field are buttons for "Insert Field" and "Insert Operator". To the right is a "Functions" section with a dropdown menu set to "All Function Categories" and a list of functions: ABS, AND, BEGINS.

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

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

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote currency field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

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

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

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

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Price Rule

Information ! = Required Information

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

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Quote Line currency formula field

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

Create Quote currency field

- Makes Total_Cost_of_Hardware_Products__c field to house total

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Summary Variable

- Provides sum total quantity value of Net_Cost__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Summary Variable

Summary Variable Edit

Save Save & New Cancel

Information

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

Aggregate Function: Sum
Aggregate Field: Net_Cost__c

Filter Information

Filter Field: Product Family
Filter Value: Hardware

Operator: equals
Configurable Field: --None--

Composite Information

Composite Operator: --None--

Variable Element:

Value Element:

Total Cost of Hardware Price Rule

Implementation Process Overview



Create Price Action

- Injects variable value into Total_Cost_of_Hardware_Products__c

Total Cost of Hardware Price Rule

Implementation Process Overview

Create Price Action

Information ! = Required Information

Target Object <input type="text" value="Quote"/>	Rule <input type="text" value="Total Cost of Hardware F"/>
Target Field <input type="text" value="Total_Cost_of_Hardware_Products__c"/>	Order <input type="text"/>
Formula <input type="text"/>	

Price Action Sources

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

EX28: Total Cost of Hardware Price Rule

Sum the net cost of all products in the Hardware family

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

Quote
Q-00011

[Approvals](#) | [Quote Lines](#) | [Quote Line Groups](#) | [Quote Details](#) | [Print](#)

Quote Detail

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

Partner Discount Use Case

Account Detail

Save Cancel

Account Owner	<input checked="" type="radio"/> Admin User [Change]
Account Name	MondoCorp [View Hierarchy]
Parent Account	
Account Number	
Account Site	--None-- Bronze <input checked="" type="radio"/> Silver Gold
Partner Level	

Quantity List Unit Price Partner Discount Partner Unit Price Net Unit Price Net Total

1.00	\$75.00	0.00	\$1,800.00	\$1,800.00	\$1,800.00	
<input type="checkbox"/> 2 APTBDISPLAY Apple Thunderbolt Display	1.00	\$1,000.00	0.00	\$1,000.00	\$1,000.00	\$1,000.00

#	Product Code	Product Name	Quantity	List Unit Price	Partner Discount	Partner Unit Price	Net Unit Price	Net Total
1	ADMINHOUR	Admin Hour	1.00	\$75.00	10.00	\$1,620.00	\$1,620.00	\$1,620.00
2	APTBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	10.00	\$900.00	\$900.00	\$900.00

#	Product Code	Product Name	Quantity	List Unit Price	Partner Discount	Partner Unit Price	Net Unit Price	Net Total
1	ADMINHOUR	Admin Hour	1.00	\$75.00	20.00	\$1,440.00	\$1,440.00	\$1,440.00
2	APTBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	20.00	\$800.00	\$800.00	\$800.00

376

CONFIDENTIAL

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview Continued



Create Price Action

- Injects correct discount into SBQQ__PartnerDiscount__c

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

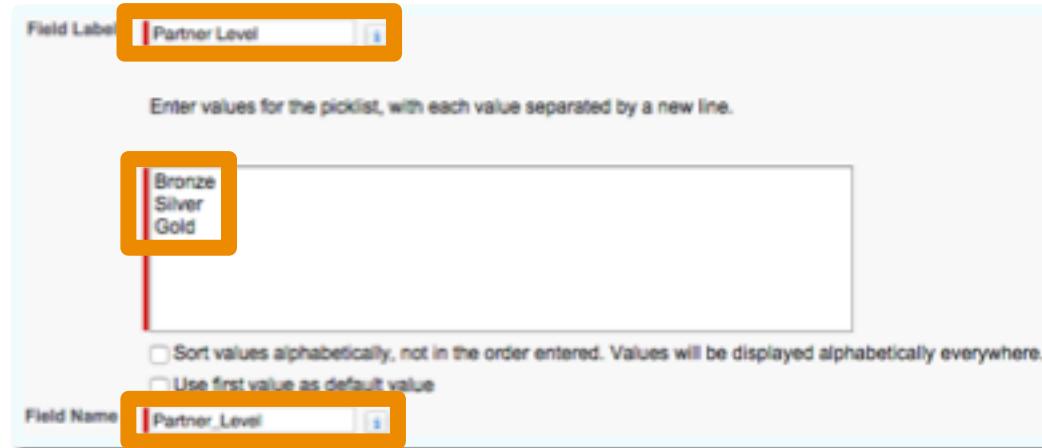
Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field



Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Quote text formula field

Step 3. Enter formula Step 3 of 5

Previous Next Cancel

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

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

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

Insert Field Insert Operator

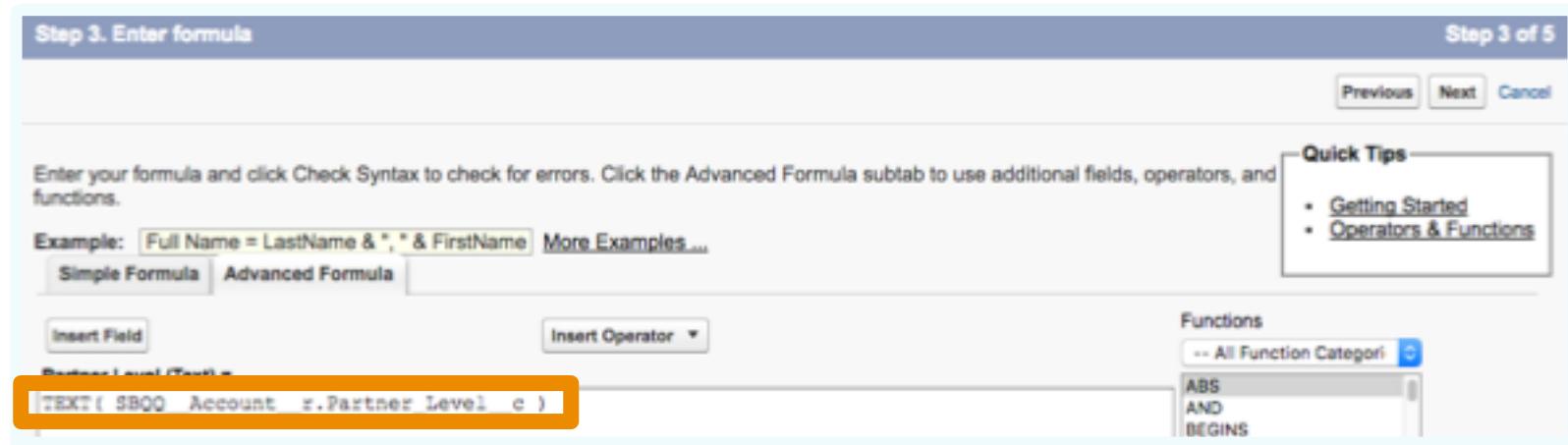
Functions

ABS
AND
BEGINS

Partner Level (Text)

Quick Tips

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



Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Price Rule

Information ! = Required Information

Price Rule Name <input type="text" value="Partner Discount"/>	Active <input checked="" type="checkbox"/>
Evaluation Scope <input type="text" value="Calculator"/> <input type="button" value="..."/>	Evaluation Order <input type="text" value="50"/> <input type="button" value="..."/>
Conditions met <input type="text" value="All"/> <input type="button" value="..."/>	Product <input type="button" value="..."/>
Calculator Evaluation Event <input type="text" value="Available"/> <input type="button" value="..."/> <input type="text" value="Chosen"/> <input type="button" value="..."/>	Lookup Object <input type="text" value="--None--"/> <input type="button" value="..."/>

Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

- Makes Partner Level available on accounts

Create Quote text formula field

- Copies account Partner Level value to the quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

- Makes rule fire when Partner Level is not blank

Partner Discount Price Rule

Implementation Process Overview

Create Condition

Information

Price Rule: Partner Discount

Object: Quote

Field: Partner_Level__c

Tested Formula:

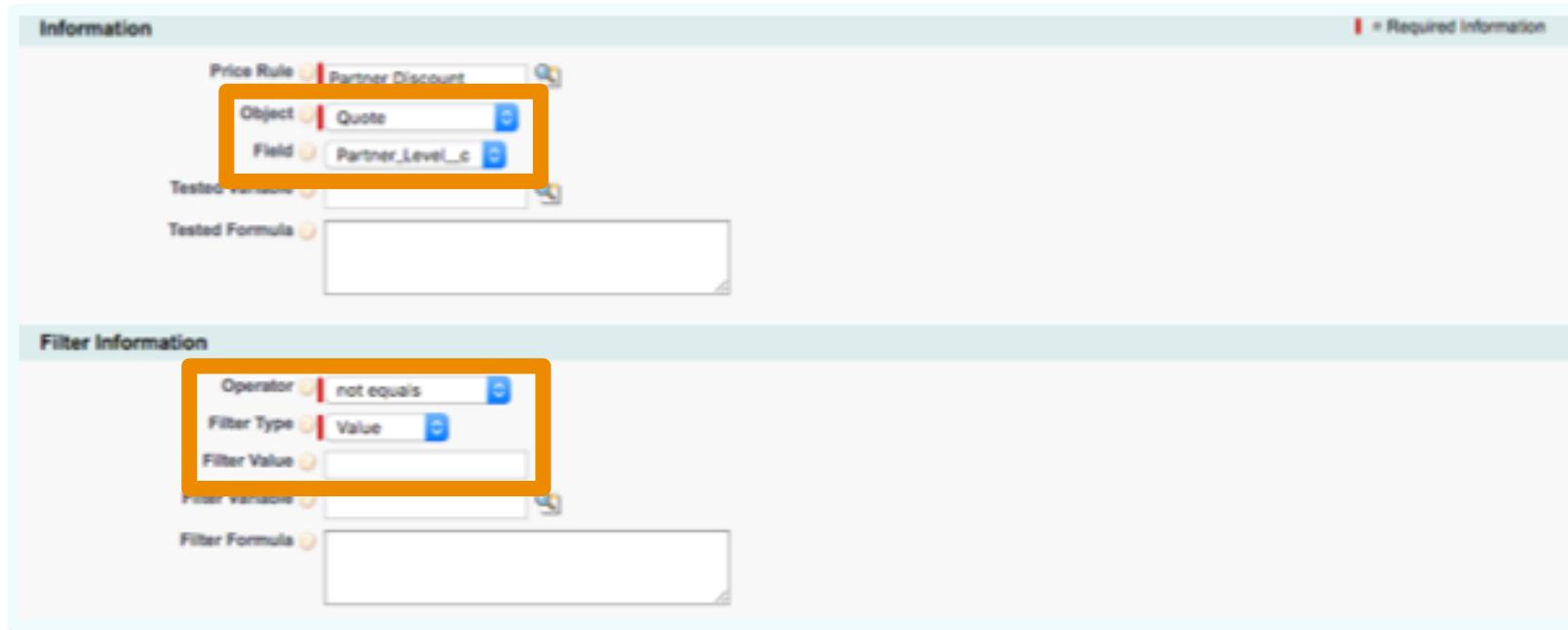
Filter Information

Operator: not equals

Filter Type: Value

Filter Value:

Filter Formula:



Partner Discount Price Rule

Implementation Process Overview



Create Price Action

- Injects correct discount into SBQQ__PartnerDiscount__c

Partner Discount Price Rule

Implementation Process Overview

Create Price Action

Information

Target Object: Quote Line
Target Field: SBQQ_PartnerDiscount_c

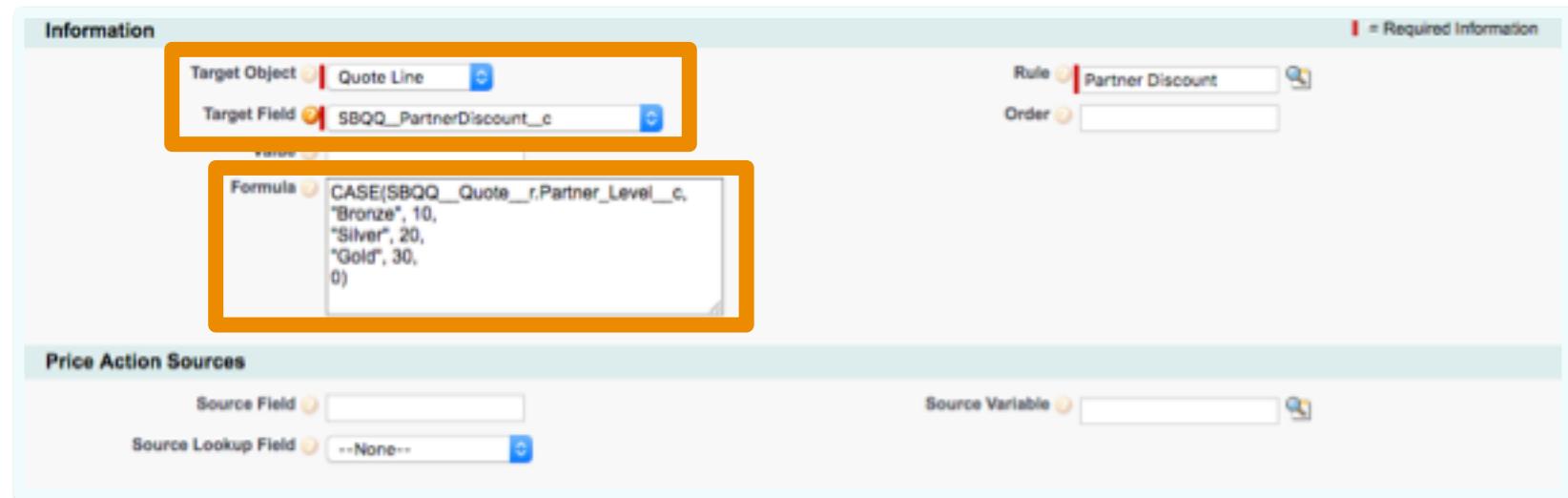
Rule: Partner Discount
Order: [empty]

Formula: CASE(SBQQ__Quote__r.Partner_Level__c,
"Bronze", 10,
"Silver", 20,
"Gold", 30,
0)

Price Action Sources

Source Field: [empty]
Source Variable: [empty]

Source Lookup Field: --None--



EX29: Partner Discount Price Rule

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

Key Concepts

Pricing Rule

Understand the Pricing Rule assembly process

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



Key Concepts

Pricing Rule (continued)

Summary Variable assembly process

- Composite Information (ie. WiFi Access Point)

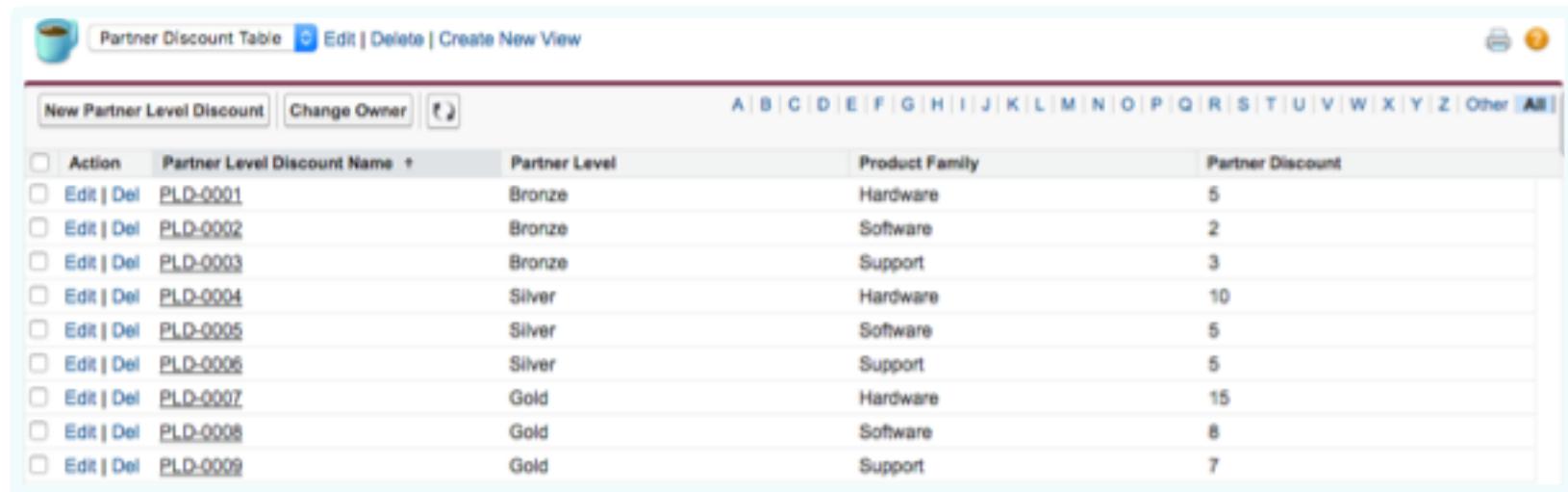
Related Knowledge Base Articles:

- [Price Rules](#)
- [Adding Summary Variables](#)
- [Real-Time Price Rules in Configuration](#)
- [Writing Advanced Calculator Compatible Formulas](#)



EX30: Create a Lookup Object

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



The screenshot shows a Salesforce list view for a custom object named "Partner Discount Table". The interface includes a header with a coffee cup icon, the object name, and navigation links for Edit, Delete, and Create New View. Below the header is a toolbar with buttons for New Partner Level Discount, Change Owner, and a search field. A navigation bar above the table lists letters from A to Z, with "All" selected. The main area displays a table with columns: Action, Partner Level Discount Name, Partner Level, Product Family, and Partner Discount. The data consists of nine rows, each representing a different discount entry with unique ID PLD-0001 through PLD-0009.

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



Creating a Lookup Object

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

Create Object

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information = Required Information

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

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

Starts with vowel sound

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

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

Enter Record Name Label and Format

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

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

Data Type Auto Number

Display Format PLD-(0000) Example: A-(0000) [What Is This?](#)

Starting Number 0001

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

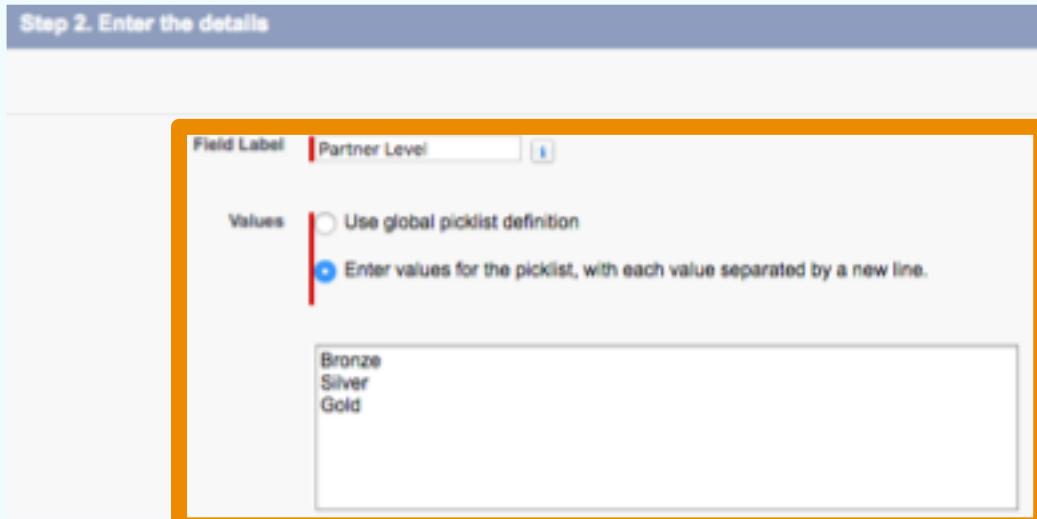
Create Object fields

Step 2. Enter the details Step 2 of 4

Field Label Partner Level [i](#)

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

Bronze
Silver
Gold



Previous Next Cancel



Lookup Object

Implementation Process Overview

Create Object fields

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label Product Family 

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

Hardware
Software
Support



Lookup Object

Implementation Process Overview

Create Object fields

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

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

Length Number of digits to the left of the decimal point

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

Field Name



Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

Lookup Object

Implementation Process Overview

Create Object records

Information

Partner Level	Bronze	<input type="button" value="▼"/>
Product Family	Hardware	<input type="button" value="▼"/>
Partner Discount	5	

Owner Brian Cloutier

Lookup Object

Implementation Process Overview

Create Object records

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

EX30: Create a Lookup Object

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



The screenshot shows a Salesforce list view titled "Partner Discount Table". The top navigation bar includes a refresh icon, the title "Partner Discount Table", and links for "Edit | Delete" and "Create New View". On the right side of the header are icons for a printer and a question mark. Below the header is a toolbar with buttons for "New Partner Level Discount", "Change Owner", and a search field. To the right of the search field is a navigation bar with letters A through Z and a "All" link. The main table has columns: "Action", "Partner Level Discount Name", "Partner Level", "Product Family", and "Partner Discount". There are 10 rows of data, each with an "Edit | Del" link and a unique ID (PLD-0001 to PLD-0009). The data is as follows:

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

Partner Discount by Product Family Use Case

Account Detail

Save Cancel

Account Owner	<input checked="" type="radio"/> Admin User [Change]
Account Name	MondoCorp [View Hierarchy]
Parent Account	
Account Number	
Account Site	--None-- Bronze <input checked="" type="radio"/> Silver Gold
Partner Level	

Quantity List Unit Price Partner Discount Partner Unit Price Net Unit Price Net Total

1.00	\$75.00		\$1,800.00	\$1,800.00	\$1,800.00
1.00	\$1,000.00		\$1,000.00	\$1,000.00	\$1,000.00

<input type="checkbox"/>	#	Product Code	Product Name	Quantity	List Unit Price	Partner Discount	Partner Unit Price	Net Unit Price	Net Total
<input type="checkbox"/>	1	ADMINHOUR	Admin Hour	1.00	\$75.00	3.00	\$1,746.00	\$1,746.00	\$1,746.00
<input type="checkbox"/>	2	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	5.00	\$950.00	\$950.00	\$950.00

<input type="checkbox"/>	#	Product Code	Product Name	Quantity	List Unit Price	Partner Discount	Partner Unit Price	Net Unit Price	Net Total
<input type="checkbox"/>	1	ADMINHOUR	Admin Hour	1.00	\$75.00	5.00	\$1,710.00	\$1,710.00	\$1,710.00
<input type="checkbox"/>	2	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$1,000.00	10.00	\$900.00	\$900.00	\$900.00

406

CONFIDENTIAL

 salesforce

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

Information ! = Required Information

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

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c



Partner Discounts by Product Family

Implementation Process Overview

Create Condition

Information

Price Rule: Partner Discounts by Pn.

Object: Quote

Field: Partner_Level__c

Tested Formula:

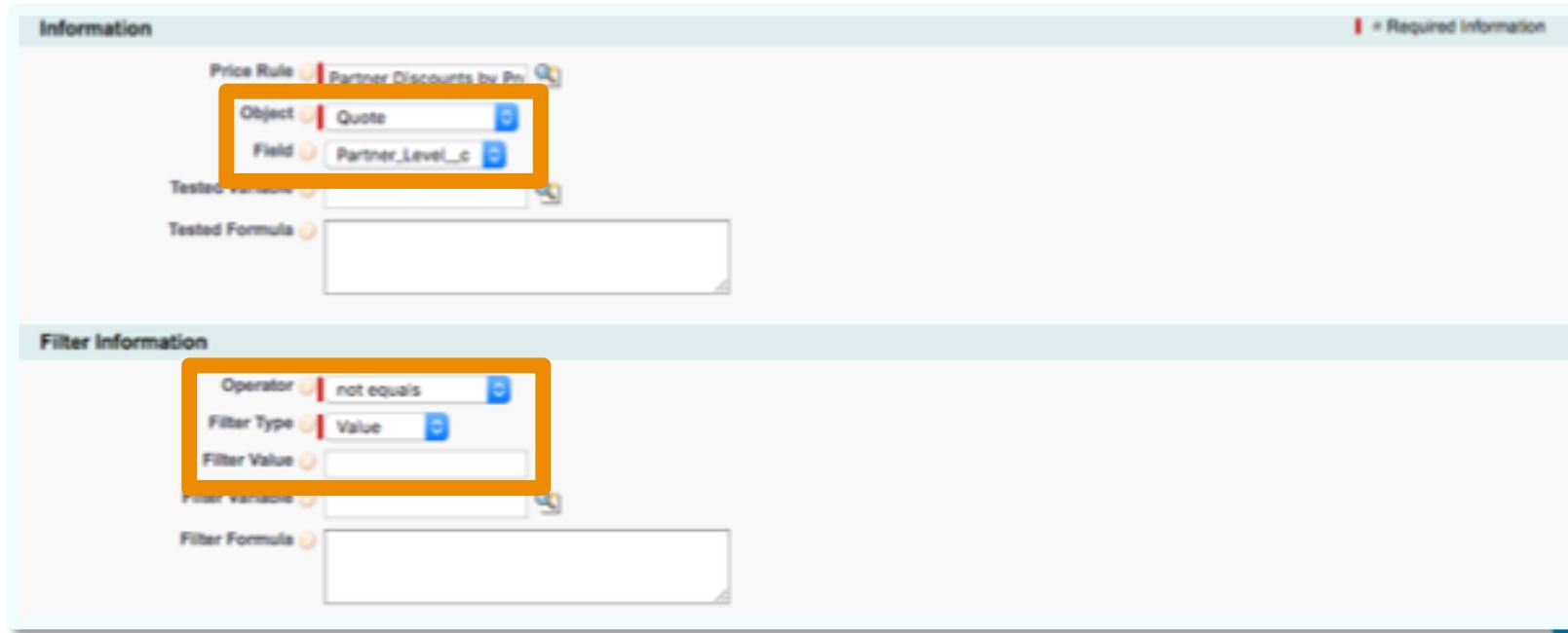
Filter Information

Operator: not equals

Filter Type: Value

Filter Value:

Filter Formula:



Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Lookup Queries

Information

Match Type: Field Value
Tested Object: Quote Line
Tested Field: SBQQ_ProductFamily_c

Price Rule: Partner Discounts by Pro

Lookup Information

Operator: equals
Lookup Field: Product_Family_c

The screenshot shows the 'Information' section of a Salesforce Price Rule setup. It includes fields for Match Type (Field Value), Tested Object (Quote Line), and Tested Field (SBQQ_ProductFamily_c). The 'Information' section has a red border. Below it is the 'Lookup Information' section, which includes an Operator (equals) and a Lookup Field (Product_Family_c). The 'Lookup Information' section also has a red border. A legend at the top right indicates that a red border = Required Information.

Partner Discounts by Product Family

Implementation Process Overview

Create Lookup Queries

Information

Match Type: Field Value
Tested Object: Quote
Tested Field: Partner_Level__c

Price Rule: Partner Discounts by Prn

Information

Operator: equals
Lookup Field: Partner_Level__c

The screenshot shows the 'Information' section of a Salesforce Price Rule setup. It includes fields for Match Type (Field Value), Tested Object (Quote), and Tested Field (Partner_Level__c). Below this, there's a 'Lookup Information' section with Operator (equals) and Lookup Field (Partner_Level__c). A red box highlights the 'Match Type' field group, and another red box highlights the 'Operator' and 'Lookup Field' groups. A legend at the top right indicates a red exclamation mark means 'Required Information'.

Partner Discounts by Product Family

Implementation Process Overview

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create Condition

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

Create Lookup Queries

- Determines which custom object record contains relevant data

Create Price Action

- Injects retrieved discount value into SBQQ__PartnerDiscount__c

Partner Discounts by Product Family

Implementation Process Overview

Create Price Action

Information ! = Required Information

Target Object <input type="text" value="Quote Line"/> ? S	Rule <input type="text" value="Partner Discounts by Pv"/> ? S
Target Field <input type="text" value="SBQQ__PartnerDiscount__c"/> ? S	Order <input type="text" value="1"/>
Formula ! <input type="text"/>	

Price Action Sources

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

EX31: Partner Discounts by Product Family

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

Key Concepts

Pricing Rule (continued)

Understand the Pricing Rule capabilities to support Lookup Objects

- Lookup Object and Lookup Field fields
- Tested Field and Target Field on the Price Action

Related Knowledge Base Articles:

- [Price Rules](#)
- [Lookup Object / Table](#)



QUOTE TEMPLATES

- 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.



Call to Action

Focus on skill & knowledge related to exam objectives



Quote Templates

Quote Template Use Case



Quote Template Overview

There are five main steps to creating a functional quote template

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

Quote Template Structure

Quote Template Information

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

Related Lists

- Line Columns
- Template Sections
- Additional Documents

Create a Quote Template

Implementation Process Overview

Create Quote Template

- Define basic company information and layout details

Create a Quote Template

Create Quote Template

Information + Required Information

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

Page Information

Page Width <input type="text" value="8.50"/>	Page Height <input type="text" value="11.00"/>
Top Margin <input type="text" value="0.50"/>	Bottom Margin <input type="text" value="0.50"/>
Left Margin <input type="text" value="0.50"/>	Right Margin <input type="text" value="0.50"/>

Corporate Information

Company Name <input type="text" value="SteelBrick"/>	Company Street <input type="text" value="1730 S El Camino Real"/>
Company Slogan <input type="text" value="Next Generation Quote-to-Cash"/>	Company City <input type="text" value="San Mateo"/>
Company Phone <input type="text" value="(650) 627-7030"/>	Company State <input type="text" value="CA"/>
Company Fax <input type="text"/>	Company Postal Code <input type="text" value="94402"/>
Company Email <input type="text" value="info@steelbrick.com"/>	Company Country <input type="text" value="United States"/>



EX36: Create a Quote Template

<p>et déposé une offre commerciale pour l'acquisition d'un véhicule avec une quote-in et toutes taxes comprises, et il faut que l'offre contienne toute la quote-in et toutes taxes comprises.</p> <p>Cette offre sera évaluée par un conseiller financier et sera déposée au bureau régional de votre magasin. Si vous avez acheté un autre véhicule dans le passé, nous devons être informés de ce précédent achat. Cela aide à nous donner une meilleure évaluation lorsque nous déterminons si nous pouvons vous offrir une quote-in plus basse, tout en assurant que votre demande reste toujours honnête et transparente. Nous devons être informés également de tout achat effectué au cours des dernières 12 semaines, et nous devons être informés de tout achat effectué au cours des dernières 12 semaines depuis lequel nous n'avons pas procédé à une quote-in ou une demande de financement.</p> <p>Tous les documents que nous recevons doivent être déposés dans un endroit sécuritaire pour éviter toute perte ou vol. Nous devons recevoir tous les documents nécessaires pour évaluer votre demande, y compris vos documents d'identité, vos documents de revenus et vos documents de dépenses. Tous les documents nécessaires pour évaluer votre demande doivent être fournis à notre établissement et doivent être accompagnés d'un courrier recommandé avec accusé de réception. Nous devons recevoir les documents nécessaires pour évaluer votre demande au moins 10 jours avant la date de votre rendez-vous.</p> <p>Votre quote-in sera présentée à la main lors de votre rendez-vous, mais peut être sujette à further revision suivant l'évaluation finale de la procédure.</p>	<p>Signature: _____ Effective Date: _____ Name (First): _____ Title: _____</p>
---	---

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

THANK YOU FOR YOUR BUSINESS!



Upload Logo File



Upload Logo File

Implementation Process Overview

Create Document and copy SFID

- Makes logo file externally available to document renderer



Update Quote Template field

- References logo SFID

Upload Logo File

Implementation Process Overview

Create Document and copy SFID

- Makes logo file externally available to document renderer



Update Quote Template field

- References logo SFID

Upload Logo File

Implementation Process Overview

Create Document

1. Enter details ! = Required Information

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



Upload Logo File

Implementation Process Overview

Create Document and copy SFID

- Makes logo file externally available to document renderer



Update Quote Template field

- References logo SFID

Upload Logo File

Implementation Process Overview

Update Quote Template field

The screenshot shows the 'Quote Template Detail' page for a template named 'Training Proposal'. The page includes fields for 'Template Name' (Training Proposal), 'Deployment Status' (In Development), and 'Generator Name'. A 'Save' button is visible. On the right, there's a 'Default' section containing a 'Logo Document Id' field with the value '01536000000LB5d'. This field is highlighted with a red border. Below it are 'Watermark Id' and 'Color' fields.

Quote Template
Training Proposal

* Back to List: Documents

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

Line Columns (3+) | Sections (2) | Additional Documents (0)

Quote Template Detail

Save Cancel

Template Name Training Proposal

Deployment Status In Development

Generator Name

Default

Logo Document Id 01536000000LB5d

Watermark Id

EX37: Upload a Logo File

Add a logo to your output document

Add Draft Watermark



Add Draft Watermark

Implementation Process Overview

Update Quote Template field

- References watermark SFID



Update Quote layout

- Allows users to see Watermark Shown field

Add Draft Watermark

Implementation Process Overview

Update Quote Template field

- References watermark SFID

Update Quote layout

- Allows users to see Watermark Shown field

Add Draft Watermark

Implementation Process Overview

Update Quote Template field

The screenshot shows the 'Quote Template Detail' page for a template named 'Training Proposal'. The page includes fields for 'Template Name' (Training Proposal), 'Deployment Status' (In Development), 'Generator Name' (empty), and 'Default' (unchecked). A red box highlights the 'Watermark ID' field, which contains the value '01536000001dJ2V'. Navigation links at the top right include 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'.

Quote Template
Training Proposal

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

Back to List: Documents

Line Columns (2) | Sections (2) | Additional Documents (0) | Document Recipients (0)

Quote Template Detail

Save Cancel

Template Name: Training Proposal

Deployment Status: In Development

Generator Name:

Default:

Last Document ID: 01536000001dJ2V

Watermark ID: 01536000001dJ2V

Add Draft Watermark

Implementation Process Overview

Update Quote Template field

- References watermark SFID



Update Quote layout

- Allows users to see Watermark Shown field

Add Draft Watermark

Implementation Process Overview

Update Quote layout

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

EX38: Add Draft Watermark

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

Add Additional Documents

Q-00011
Preview Document

Document Options

Template: Training Proposal

Additional Documents

Available Content:

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

Included Content:

- Quote Document



Add Additional Documents

Implementation Process Overview

Create Additional Document

- References SFID of an existing Salesforce document record

Add Additional Documents

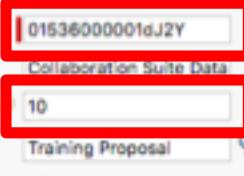
Implementation Process Overview

Create Additional Document

Information ! = Required Information

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

Save **Cancel**



EX39: Add Additional Documents

Add two user-selectable documents to your output document

Key Concepts

Quote Template

Understand when it's appropriate to check the "Watermark Shown" quote field

Understand how to add additional documents as an attachment to the document generation

Related Knowledge Base Articles:

- [Generate Documents](#)
- [Display Watermarks on Draft Quote Document Previews](#)
- [Microsoft word output of Quote Document in Salesforce CPQ](#)



Template Sections

Template Content

Template Content Basics

Content driven by HTML markup

For layout and branding of the content in HTML sections

Types of Template Content

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

Assemble Custom Document



Assemble Custom Document

Implementation Process Overview

Create Template Sections

- References provided training template content

Assemble Custom Document

Implementation Process Overview

Create Template Sections

Information Required Information

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

EX40: Assemble Custom Document

Template Content are already created, associate them to preloaded their Template Sections:

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

Key Concepts

Quote Template

Understand the Content and Template Section assembly process

Quote Template > Print Options

- Roll-up field settings
- Show All Package Products
- Show Bundled Products
- Hide Component Products
- Group Field defining capabilities

Related Knowledge Base Articles:

- [Create Template Sections](#)
- [Create Template Content](#)
- [Line Item Print Options](#)



Line Item Section

Adjust Line Columns

Proposal Q-00011-1

Date: 02/01/2018
Expires On: 02/01/2018

1730 S El Camino Real
San Mateo, CA 94403
Phone: (650) 555-0100
Email: info@infinitysolutions.com

Prepared For:

WesleyCorp
200 Main Street
Orange, CA 92867
United States

Prepared By:

John Doe
john.doe@infinitysolutions.com

Part	Product	Description	Unit	Price	Qty	Total
1.00	Apple MacBook Pro	17" Apple MacBook Pro (2016)	EA	\$1,299.00	1	\$1,299.00
1.00	CPU i7 8GB RAM	i7 CPU	EA	\$899.00	1	\$899.00
1.00	RAM 16GB	16GB RAM	EA	\$129.00	1	\$129.00
1.00	SSD Hard Drive 1TB	1TB SSD	EA	\$199.00	1	\$199.00
1.00	Apple USB Keyboard	Apple USB Keyboard	EA	\$69.00	1	\$69.00
1.00	Apple Thunderbolt Display	15" Thunderbolt Display	EA	\$1,099.00	1	\$1,099.00
1.00	Laptop Case	Laptop Case	EA	\$49.00	1	\$49.00
1.00	Laptop Toner Cartridge	Laptop Toner Cartridge	EA	\$29.00	1	\$29.00
1.00	Laptop Toner Maintenance Kit	Laptop Toner Maintenance Kit	EA	\$69.00	1	\$69.00
1.00	WiFi Router	WiFi Router	EA	\$129.00	1	\$129.00
1.00	WiFi Access Point	WiFi Access Point	EA	\$69.00	1	\$69.00
1.00	WiFi Extender	WiFi Extender	EA	\$69.00	1	\$69.00
1.00	Apple iPad 9.7 inch Memory: 32GB	9.7" iPad	EA	\$499.00	1	\$499.00
1.00	Microsoft Office 365	Office 365	EA	\$129.00	1	\$129.00
1.00	Adonis Headset	Adonis Headset	EA	\$129.00	1	\$129.00
						TOTAL: \$4,699.00

Please fax or signed copy of this BOM and other proposal documents to and mail two sets of original to:

Davidson
400 South Fremont
11th Floor
San Jose, CA 95113
Fax Number: (408) 555-0100

All parties have cause this Agreement to be executed and delivered by their respective authorized representatives or
signature under date:

Davidson

Signature

WesleyCorp

Signature

Page 2 of 2



Adjust Line Columns

Implementation Process Overview

Update Line Columns

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

Adjust Line Columns

Implementation Process Overview

Update Line Columns

Information = Required Information

Column Heading	PRODUCT
Display Order	20
Width	20.00
Template	Training Proposal
Field Name	SBQQ_ProductName_c
Alignment	Left

Adjust Line Columns

Implementation Process Overview

Update Line Columns

Information = Required Information

Column Heading	DESCRIPTION
Display Order	30
Width	40.00
Section	

Template: Training Proposal
Field Name: SBQQ_Description_c
Alignment: Left



EX44: Adjust Line Columns

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

Conditional Discount Column

**INFINITY
SOLUTIONS**

Proposal Q-00011-1

Date: 02/02/2014 11:17 AM
Expires On: 02/03/2014

Prepared For:
Mr/Mrs/Cs
201 Harrison St
Cupertino, CA 95014
United States

Prepared By:
Admin User
user@infinitysolutions.com

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	DISCOUNT (%)	EXTENDED
1.00	Apple MacBook Pro	13" Apple MacBook Pro (2010)	\$1,299.00	0.00	\$1,299.00
1.00	CPU i3 2.3GHz i7		\$120.00	0.00	\$120.00
1.00	Mem -4GB		\$10.00	0.00	\$10.00
1.00	SSD Hard Drive (128GB)		\$150.00	0.00	\$150.00
1.00	Apple US Keyboard		\$60.00	0.00	\$60.00
1.00	Apple Thunderbolt Display		\$1,200.00	0.00	\$1,200.00
1.00	LaserJet Printer		\$600.00	0.00	\$600.00
1.00	LaserJet Toner Cartridge		\$20.00	0.00	\$20.00
1.00	LaserJet Maintenance Kit		\$50.00	0.00	\$50.00
1.00	WIFI Router		\$100.00	0.00	\$100.00
1.00	WIFI Access Point		\$60.00	0.00	\$60.00
1.00	WIFI Extender		\$60.00	0.00	\$60.00
1.00	Loss and Damage Waiver		\$600.75	0.00	\$600.75
1.00	Microsoft Office 2010		\$100.00	0.00	\$100.00
10.00	Admin Hour		\$70.00	0.00	\$700.00
			TOTAL:		\$4,669.75

Please fax or signed copy of this SO and all supporting documents to and mail two sets of original to:
Buyer:
Mr. James Courtney
1750 S 21st Cupertino Real
San Mateo, CA 94402

An electronic signature (e.g., the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives via electronic digital means).

Signature: _____ **Signature:** _____
Page 2 of 4

**INFINITY
SOLUTIONS**

Proposal Q-00011-1

Date: 02/02/2014 11:17 AM
Expires On: 02/03/2014

Prepared For:
Mr/Mrs/Cs
201 Harrison St
Cupertino, CA 95014
United States

Prepared By:
Admin User
user@infinitysolutions.com

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	DISCOUNT (%)	EXTENDED
1.00	Apple MacBook Pro	13" Apple MacBook Pro (2010)	\$1,299.00	0.00	\$1,299.00
1.00	CPU i3 2.3GHz i7		\$120.00	0.00	\$120.00
1.00	Mem -4GB		\$10.00	0.00	\$10.00
1.00	SSD Hard Drive (128GB)		\$150.00	0.00	\$150.00
1.00	Apple US Keyboard		\$60.00	0.00	\$60.00
1.00	Apple Thunderbolt Display		\$1,200.00	0.00	\$1,200.00
1.00	LaserJet Printer		\$600.00	0.00	\$600.00
1.00	LaserJet Toner Cartridge		\$20.00	0.00	\$20.00
1.00	LaserJet Maintenance Kit		\$50.00	0.00	\$50.00
1.00	WIFI Router		\$100.00	0.00	\$100.00
1.00	WIFI Access Point		\$60.00	0.00	\$60.00
1.00	WIFI Extender		\$60.00	0.00	\$60.00
1.00	Loss and Damage Waiver		\$600.75	0.00	\$600.75
1.00	Microsoft Office 2010		\$100.00	0.00	\$100.00
10.00	Admin Hour		\$70.00	0.00	\$700.00
			TOTAL:		\$4,669.75

Please fax or signed copy of this SO and all supporting documents to and mail two sets of original to:
Buyer:
Mr. James Courtney
1750 S 21st Cupertino Real
San Mateo, CA 94402

An electronic signature (e.g., the Parties have caused this Agreement to be executed and delivered by their respective authorized representatives via electronic digital means).

Signature: _____ **Signature:** _____
Page 2 of 4



Conditional Discount Column

Implementation Process Overview

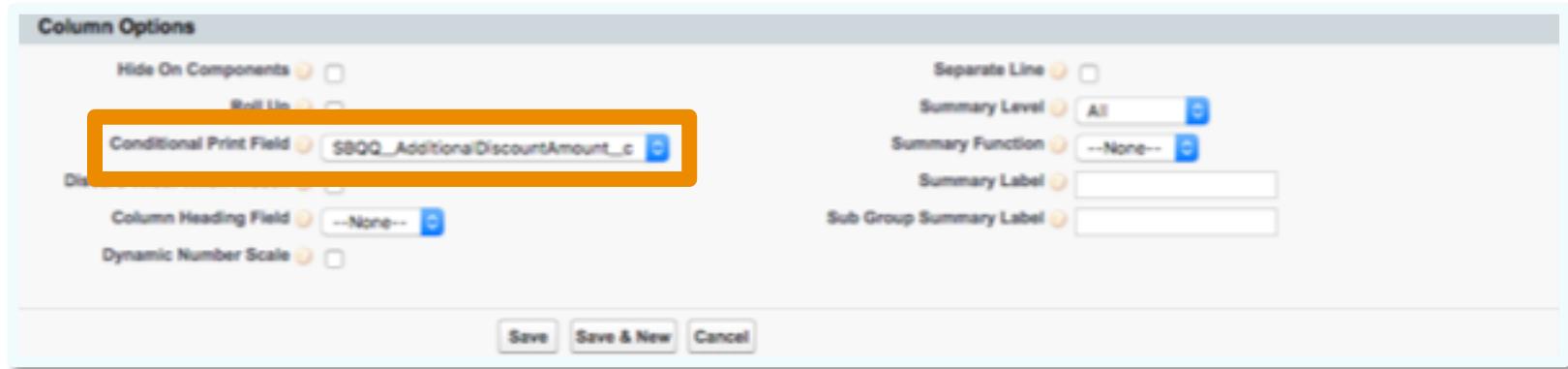
Update Line Column

- Uses SBQQ__AdditionalDiscountAmount__c to drive column visibility

Conditional Discount Column

Implementation Process Overview

Update Line Columns



EX45: Conditional Discount Column

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

Conditional Pricing Columns

**INFINITY
SOLUTIONS**

Proposal Q-00011-1

Date: 02/20/2014 11:17 AM
Expires On: 02/20/2014

Prepared For:
WemoOne
201 Harrison St
Cupertino, CA 95014
United States

Prepared By:
Admin User
user@infinitysolutions.com

SPRT	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
1.00	Apple MacBook Pro	15" Apple MacBook Pro (2010)	\$1,200.00	\$1,200.00
2.00	CPU i3 2.8GHz i7		\$200.00	\$200.00
3.00	Mem 16GB		\$100.00	\$100.00
4.00	SSD Hard Drive 120GB		\$100.00	\$100.00
5.00	Apple USB Keyboard		\$50.00	\$50.00
6.00	Apple Thunderbolt Display		\$1,200.00	\$1,200.00
7.00	LaserJet Printer		\$200.00	\$200.00
8.00	LaserJet Toner Cartridge		\$25.00	\$25.00
9.00	LaserJet Maintenance Kit		\$50.00	\$50.00
10.00	WiFi Router		\$100.00	\$100.00
11.00	WiFi Access Point		\$60.00	\$60.00
12.00	WiFi Installation		\$60.00	\$60.00
13.00	Loss and Damage Waiver		\$60.00	\$60.00
14.00	Microsoft Office 2010		\$100.00	\$100.00
15.00	Admin Hour		\$75.00	\$75.00
			Subtotal:	\$4,665.00

Please fax or signed copy of this BOM and all associated documents to and mail two sets of original to:
Recipient:
Mr. John Doe Company
1750 S 20th Street
San Mateo, CA 94403

An electronic version of this Agreement has caused this Agreement to be executed and delivered by their respective authorized representatives via signature capture below.

Signature _____ **Signature** _____
Page 2 of 4

**INFINITY
SOLUTIONS**

Proposal Q-00011-1

Date: 02/20/2014 11:17 AM
Expires On: 02/20/2014

Prepared For:
WemoOne
201 Harrison St
Cupertino, CA 95014
United States

Prepared By:
Admin User
user@infinitysolutions.com

SPRT	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
1.00	Apple MacBook Pro	15" Apple MacBook Pro (2010)	\$1,200.00	\$1,200.00
2.00	CPU i3 2.8GHz i7		\$200.00	\$200.00
3.00	Mem 16GB		\$100.00	\$100.00
4.00	SSD Hard Drive 120GB		\$100.00	\$100.00
5.00	Apple USB Keyboard		\$50.00	\$50.00
6.00	Apple Thunderbolt Display		\$1,200.00	\$1,200.00
7.00	LaserJet Printer		\$200.00	\$200.00
8.00	LaserJet Toner Cartridge		\$25.00	\$25.00
9.00	LaserJet Maintenance Kit		\$50.00	\$50.00
10.00	WiFi Router		\$100.00	\$100.00
11.00	WiFi Access Point		\$60.00	\$60.00
12.00	WiFi Installation		\$60.00	\$60.00
13.00	Loss and Damage Waiver		\$60.00	\$60.00
14.00	Microsoft Office 2010		\$100.00	\$100.00
15.00	Admin Hour		Subtotal:	\$4,665.00

Please fax or signed copy of this BOM and all associated documents to and mail two sets of original to:
Recipient:
Mr. John Doe Company
1750 S 20th Street
San Mateo, CA 94403

An electronic version of this Agreement has caused this Agreement to be executed and delivered by their respective authorized representatives via signature capture below.

Signature _____ **Signature** _____
Page 2 of 4



Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

- Places Show_Pricing_Columns__c into the user interface



Update Line Columns

- Uses Show_Pricing_Columns__c to drive visibility of price columns

Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

- Places Show_Pricing_Columns__c into the user interface



Update Line Columns

- Uses Show_Pricing_Columns__c to drive visibility of price columns

Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

The screenshot shows a configuration interface for a new field. The field is a checkbox type, indicated by the orange border around the 'Field Label' and 'Field Name' sections. The 'Field Label' is set to 'Show Pricing Columns' and the 'Field Name' is set to 'Show_Pricing_Columns'. The 'Default Value' section shows two radio buttons: 'Checked' (white) and 'Unchecked' (blue), with 'Unchecked' selected. The entire configuration is contained within a light blue rounded rectangle.

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

Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

- Places Show_Pricing_Columns__c into the user interface



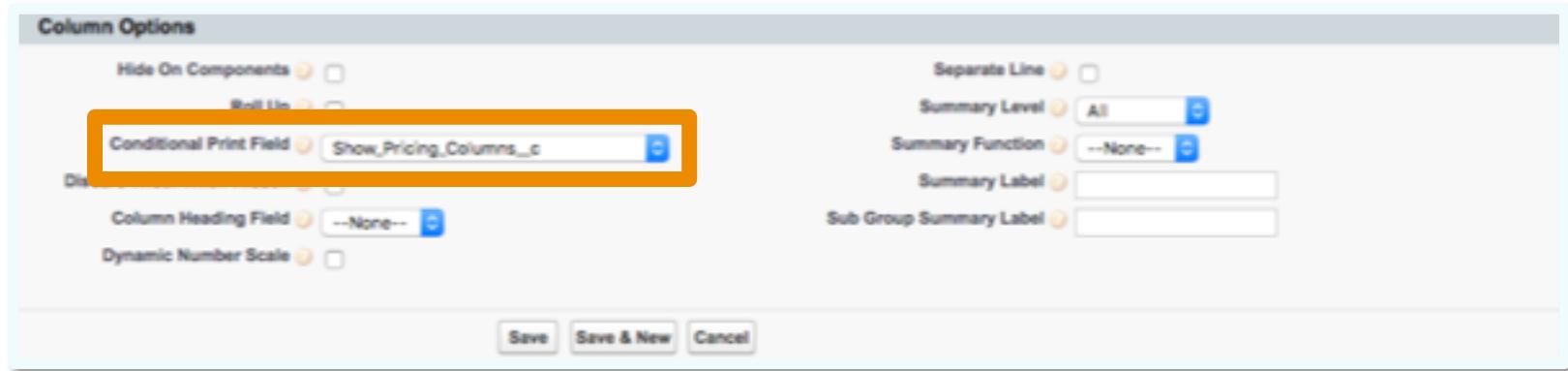
Update Line Columns

- Uses Show_Pricing_Columns__c to drive visibility of price columns

Conditional Pricing Columns

Implementation Process Overview

Update Line Columns



EX46: Conditional Pricing Columns

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

Conditional Line Item Tables

**INFINITY
SOLUTIONS**

Proposal Q-00011-1

Date: 02/02/2014 11:17 AM
Expires On: 02/03/2014

Prepared For:
WendyOne
201 Nevada St
Ogden, UT 84401
United States

Prepared By:
Admin User
wendysolutions.com

ITEMS

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
1.00	LaserJet Toner Cartridge		\$10.00	\$10.00
1.00	LaserJet Maintenance Kit		\$5.00	\$5.00
	Consumable Subtotal			\$15.00
1.00	Apple MacBook Pro 13" Apple MacBook Pro (2013)		\$1,200.00	\$1,200.00
1.00	CD/DVD Writer		\$50.00	\$50.00
1.00	Keyboard		\$100.00	\$100.00
1.00	SSD Hard Drive - 120GB		\$150.00	\$150.00
1.00	Apple USB Headphones		\$20.00	\$20.00
1.00	Apple Thunderbolt Display		\$1,000.00	\$1,000.00
1.00	LaserJet Printer		\$275.00	\$275.00
1.00	WiFi Router		\$100.00	\$100.00
1.00	WiFi Access Point		\$60.00	\$60.00
	Hardware Subtotal			\$2,410.00
1.00	WiFi Extender		\$60.00	\$60.00
	Service Subtotal			\$60.00
	One-time Subtotal			\$2,530.00
		One-time Total:		\$2,530.00

ITEMS

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
1.00	Microsoft Office 2010		\$1,400.00	\$1,400.00
	Software Subtotal			\$1,400.00
1.00	Loss and Damage Waiver		\$600.00	\$600.00
10.00	Admin Hour		\$75.00	\$750.00
				\$2,530.00

Page 2 of 4

**INFINITY
SOLUTIONS**

Proposal Q-00011-1

Date: 02/02/2014 11:17 AM
Expires On: 02/03/2014

Prepared For:
WendyOne
201 Nevada St
Ogden, UT 84401
United States

Prepared By:
Admin User
wendysolutions.com

ITEMS

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	EXTENDED
1.00	LaserJet Toner Cartridge		\$10.00	\$10.00
1.00	LaserJet Maintenance Kit		\$5.00	\$5.00
	Consumable Subtotal			\$15.00
1.00	Apple MacBook Pro 13" Apple MacBook Pro (2013)		\$1,200.00	\$1,200.00
1.00	CD/DVD Writer		\$50.00	\$50.00
1.00	Keyboard		\$100.00	\$100.00
1.00	SSD Hard Drive - 120GB		\$150.00	\$150.00
1.00	Apple USB Headphones		\$20.00	\$20.00
1.00	Apple Thunderbolt Display		\$1,000.00	\$1,000.00
1.00	LaserJet Printer		\$275.00	\$275.00
1.00	WiFi Router		\$100.00	\$100.00
1.00	WiFi Access Point		\$60.00	\$60.00
	Hardware Subtotal			\$2,410.00
1.00	WiFi Extender		\$60.00	\$60.00
	Service Subtotal			\$60.00
1.00	Microsoft Office 2010		\$1,400.00	\$1,400.00
	Software Subtotal			\$1,400.00
1.00	Loss and Damage Waiver		\$600.00	\$600.00
10.00	Admin Hour		\$75.00	\$750.00
				\$2,530.00

Please fax a copy of this BII and other referenced documents to (800) 555-0123 or e-mail to info@infinitysolutions.com.

Address:
Mr. James Conner
1750 S 21st Commerce
San Mateo, CA 94401

Page 2 of 4



Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

Field Label 

Default Value Checked Unchecked

Field Name 

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

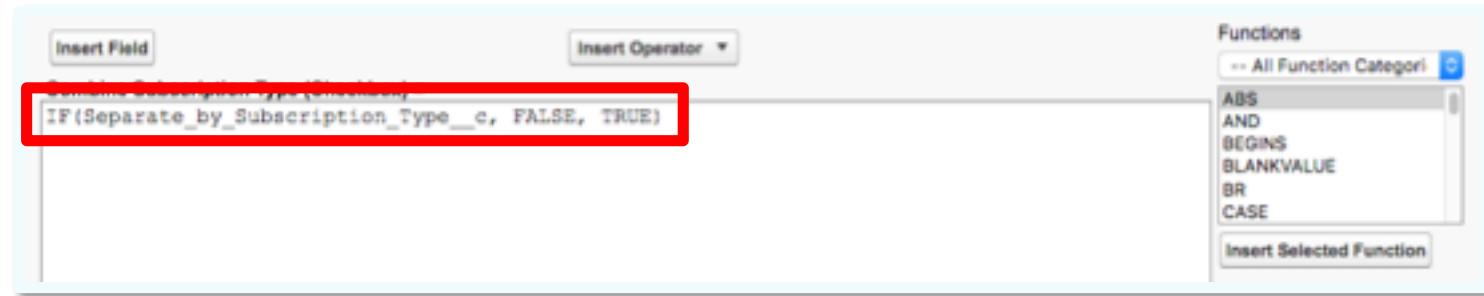
Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox formula field



Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Update Template Section

Information Required Information

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

Conditional Line Item Tables

Implementation Process Overview

Create Quote checkbox field

- Places Separate by Subscription Type into the user interface

Create Quote checkbox formula field

- Provides opposing Combine_Subscription_Type__c field

Update Template Section

- Uses Separate_by_Subscription_Type__c to drive table visibility

Clone Template Section and Update Fields

- Uses Combine_Subscription_Type__c to drive new table visibility

Conditional Line Item Tables

Implementation Process Overview

Clone Template Section and Update Fields

Information Required Information

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

Information Required Information

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

EX50: Conditional Line Item Tables

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

Key Concepts

Quote Template (continued)

Understand how to conditionally display Line Columns and Sections

- Conditional Print Field

Related Knowledge Base Articles:

- [Dynamically Displaying Quote Line Columns](#)



Quote Terms

Quote Terms Section



Quote Terms Section

Implementation Process Overview

Create Template Content

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



Create Template Sections

- Places Terms Header and Terms content after subtotals

Quote Terms Section

Implementation Process Overview

Create Template Content

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



Create Template Sections

- Places Terms Header and Terms content after subtotals

Quote Terms Section

Implementation Process Overview

Create Template Content

Type of this content.

HTML
 Line Items
 Quote Terms
 Custom
 Template Bottom
 Template Top

Continue **Cancel**

Template Content ! = Required Information

Content Name	Quote Terms
Font Family	--None--
Text Color	
Type	Quote Terms
Font Size	

Quote Terms Section

Implementation Process Overview

Create Template Content

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



Create Template Sections

- Places Terms Header and Terms content after subtotals

Quote Terms Section

Implementation Process Overview

Create Template Sections

Information Required Information

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

Page Breaks

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

Quote Terms Section

Implementation Process Overview

Create Template Sections

Information Required Information

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

EX52: Quote Terms Section

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

Quote Terms with Merge Fields

Terms and Conditions

This quote is presented to the customer (MondoCorp) under the condition I until the expiration date of 7/22/2016, after which the quote becomes null and void. Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium.

THIS QUOTE IS PRESENTED TO THE CUSTOMER (MONDOCORP) UNDER THE CONDITION I UNTIL THE EXPIRATION DATE OF 7/22/2016, AFTER WHICH THE QUOTE BECOMES NULL AND VOID. SED UT PERSPICIATIS UNDE OMNIS ISTE NATUS ERROR SIT VOLUNTATEM ACCUSANTUM.

Please fax or e-mail a signed copy of this SO and other relevant documents to us and mail two sets of originals to:

Attention:
Mr. Steven Constant
1120 1/2 E. 10th Street, Suite 1000
Fort Worth, TX 76102

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed and acknowledged by their respective authorized representatives on the dates indicated below.

Mondo Corp.

Mondo Corp.

DRAFT

Page 1 of 4

Quote Term with Merge Fields

Implementation Process Overview

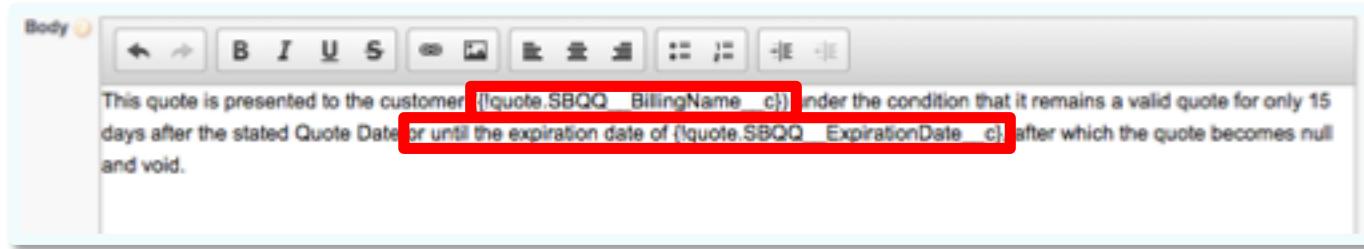
Update Quote Term

- Replaces static text with merge fields

Quote Term with Merge Fields

Implementation Process Overview

Update Quote Term



EX53: Quote Term with Merge Fields

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

Conditional Quote Term



Conditional Quote Term

Implementation Process Overview

Create Quote Term

- Makes a new quote term to appear after all others



Create Term Condition

- Uses SBQQ_Status_c to drive quote term visibility

Conditional Quote Term

Implementation Process Overview

Create Quote Term

- Makes a new quote term to appear after all others



Create Term Condition

- Uses SBQQ_Status_c to drive quote term visibility

Conditional Quote Term

Implementation Process Overview

Create Quote Term

The screenshot shows the 'Create Quote Term' page in Salesforce. The 'Information' tab is selected. A red box highlights the 'Print Order' field, which contains the value '50'. Another red box highlights the 'Active' checkbox, which is checked. A third red box highlights a note at the bottom of the page: 'This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.'

Information

Print Order: 50

Active:

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

Conditional Quote Term

Implementation Process Overview

Create Quote Term

- Makes a new quote term to appear after all others



Create Term Condition

- Uses SBQQ_Status_c to drive quote term visibility

Conditional Quote Term

Implementation Process Overview

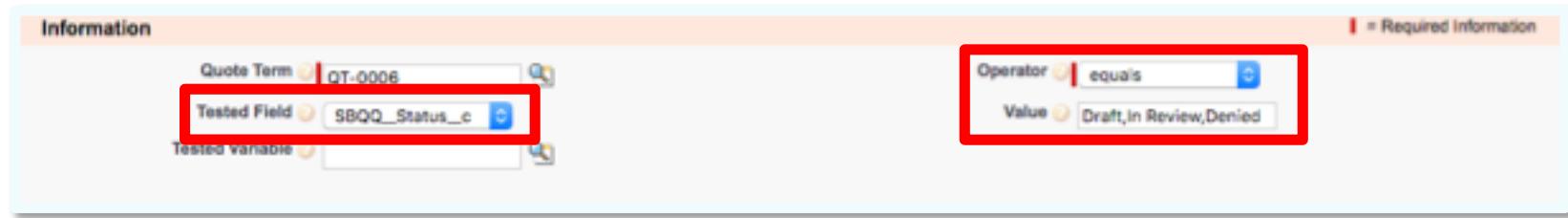
Create Term Condition

Information ! = Required Information

Quote Term	QT-0006
Tested Field	SBQQ_Status_c
Tested Variable	

Operator equals

Value Draft,In Review,Denied



EX54: Conditional Quote Term

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

Key Concepts

Quote Terms

Understand Quote Term assembly process

- Create Quote Term Template Content then create new Template Section

Understand the process on how make Quote Terms conditional

- Quote Term > Term Condition > Tested Field

Quote Terms can be locked

Related Knowledge Base Articles:

- [Creating Template Sections](#)
- [Creating Quote Term Template Content](#)
- [Multiple Quote Term Sections](#)
- [Building Quote Term Conditions](#)
- [Creating Standard Terms](#)
- [Lock Quote Term from Edits](#)



Quote Template Debugging

Template Troubleshooting Process

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

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

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



Troubleshooting

Common Support Issues

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

No Quote terms created

Quote Terms not Active

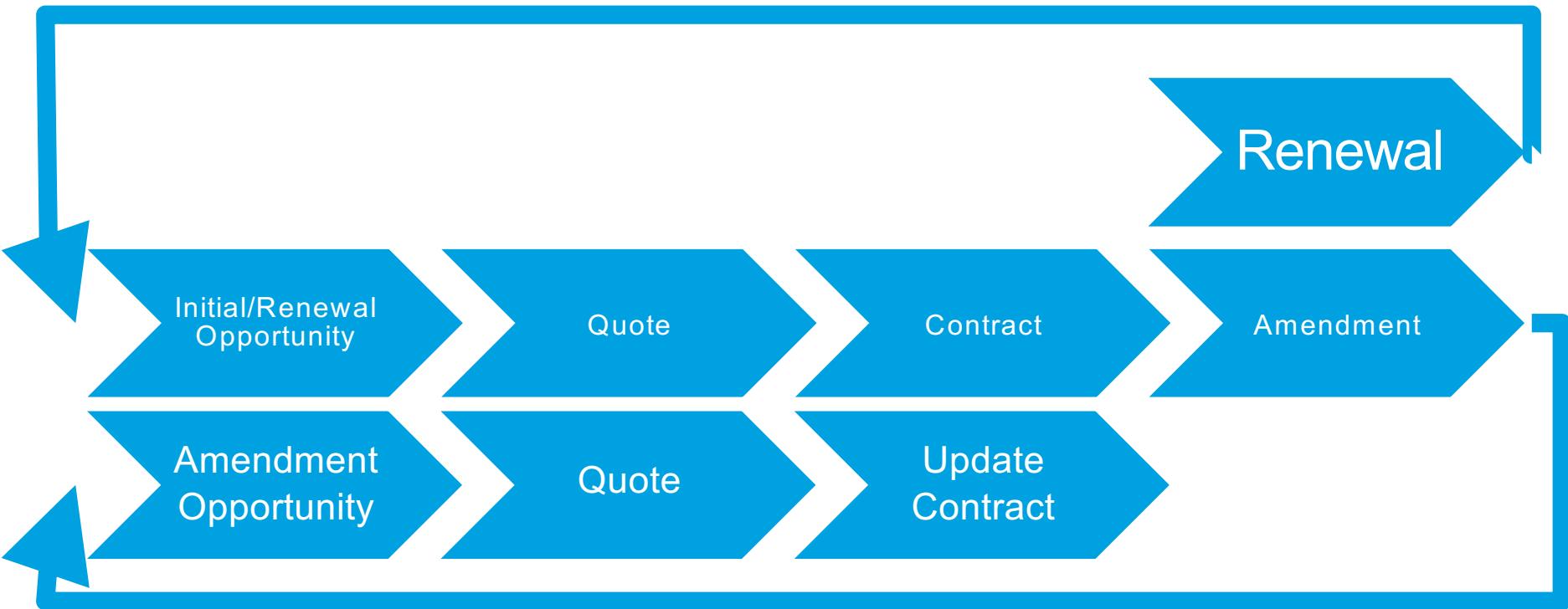
Quote Term Template Content needs to be created

Quote Term Template Content needs to be associated to the Section

Quote Term Section has a conditional print field that is returning 0 or FALSE



Contracts and Renewals



Data Flow

Simplified



Auto-Mapping Concerns

Contracting End-to-End



Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

- Generates a new opportunity for renewal



Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

- Generates a new opportunity for renewal



Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

Opportunity Information [* = Required Information]

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

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

Information Required Information

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

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

Product Selection

4 Products Found

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

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

- Generates a new opportunity for renewal



Create a Contract and Renewal Opportunity

Implementation Process Overview

Update Opportunity

Opportunity Detail

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

▼ SteelBrick Information

Primary Quote <input type="button" value="Q-00001"/>	<input type="button" value="Contracted"/> <input checked="" type="checkbox"/>
--	---

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

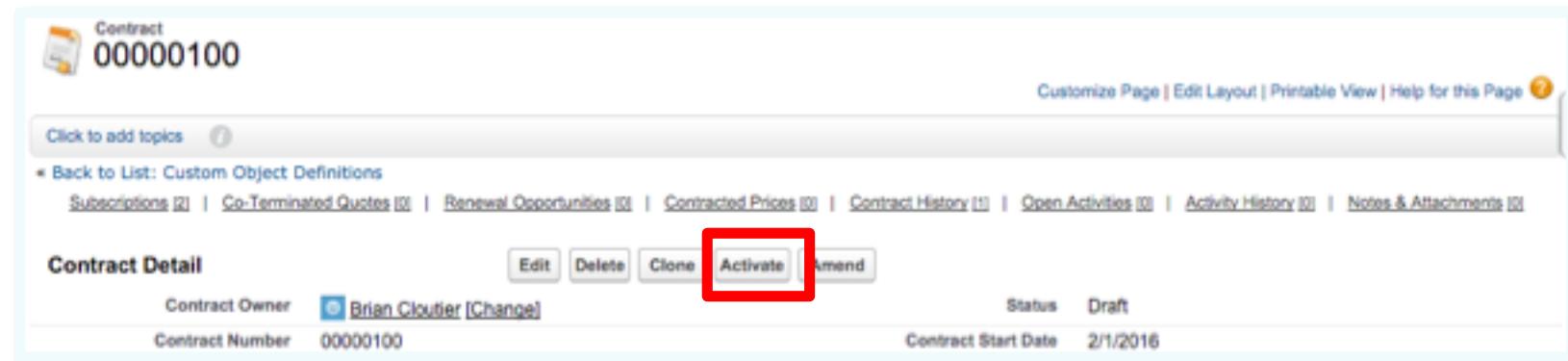
Update Contract

- Generates a new opportunity for renewal

Create a Contract and Renewal Opportunity

Implementation Process Overview

Activate Contract



The screenshot shows the Contract Detail page for a record with ID 00000100. At the top, there is a navigation bar with links for Subscriptions, Co-Terminated Quotes, Renewal Opportunities, Contracted Prices, Contract History, Open Activities, Activity History, and Notes & Attachments. Below the navigation bar, the page title is "Contract" and the record number is "00000100". On the left, there is a "Contract Detail" section with fields for Contract Owner (Brian Cloutier) and Contract Number (00000100). On the right, there are fields for Status (Draft) and Contract Start Date (2/1/2016). At the bottom of the detail section, there are five buttons: Edit, Delete, Clone, **Activate**, and Amend. The "Activate" button is highlighted with a red box.

Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

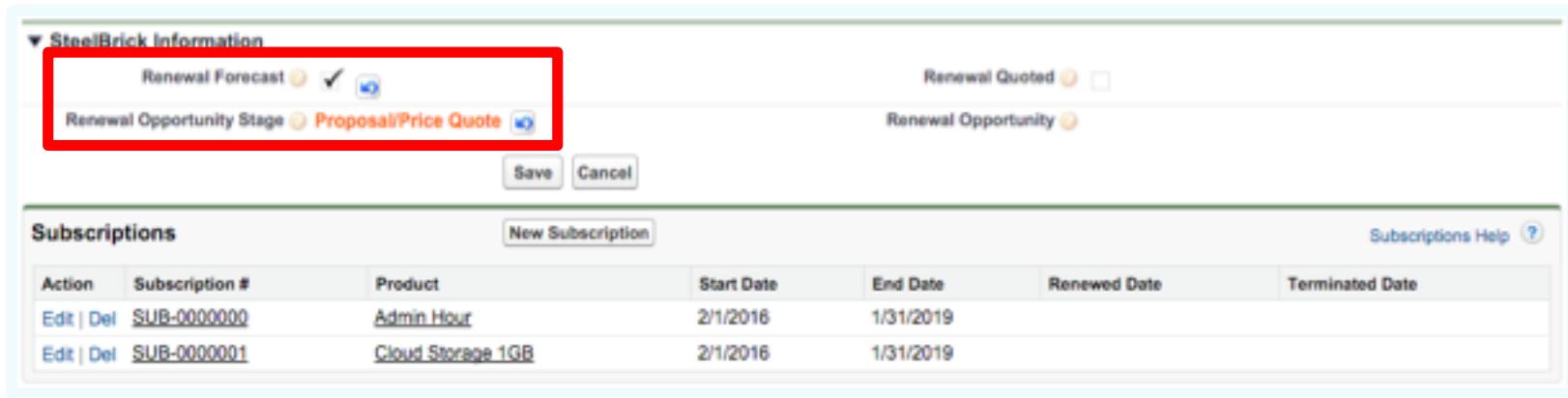
- Generates a new opportunity for renewal



Create a Contract and Renewal Opportunity

Implementation Process Overview

Update Contract



SteelBrick Information

Renewal Forecast

Renewal Opportunity Stage Proposal/Price Quote

Renewal Quoted

Renewal Opportunity

Save Cancel

Subscriptions

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

New Subscription Subscriptions Help ?

EX33: Create a Contract and Renewal Opportunity

Starting with a new Opportunity, create a quote, contract, and renewal opportunity

Troubleshoot

Contracting

30 Units of Microsoft Office 365 and 30 Units of Cloud Storage have been added to this quote.

When the Contracted box is checked, no contract is generated.

What can be done to generate the contract?

The screenshot shows the NetSuite interface with two main windows. On the left, a quote card for 'Q-00040' is displayed. It includes fields for Primary Contact (checked), Status (Draft), and Subscription Term (highlighted with an orange box). On the right, an opportunity card for 'Software - 30 Units' is shown. The opportunity details include Net Amount (\$900.00), Customer Amount (\$900.00), Regular Amount (\$900.00), List Amount (\$900.00), Type (Quote), Payment Terms (Net 30), Start Date (7/1/2017), End Date (highlighted with an orange box), and Account Name (highlighted with an orange box). The opportunity also has a Close Date (6/30/2017), Stage (Proposal/Price Quote), and Probability (%) at 75%.

Quote Number	Q-00040
Primary	<input checked="" type="checkbox"/>
Status	Draft
Expires On	7/16/2017
Sales Rep	
Primary Contact	
Subscription Term	
Delivery Method	
Master Contract	

Opportunity	Software - 30 Units
Net Amount	\$900.00
Customer Amount	\$900.00
Regular Amount	\$900.00
List Amount	\$900.00
Type	Quote
Payment Terms	Net 30
Start Date	7/1/2017
End Date	
Opportunity Name	Software - 30 Units
Account Name	
Close Date	6/30/2017
Stage	Proposal/Price Quote
Probability (%)	75%

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

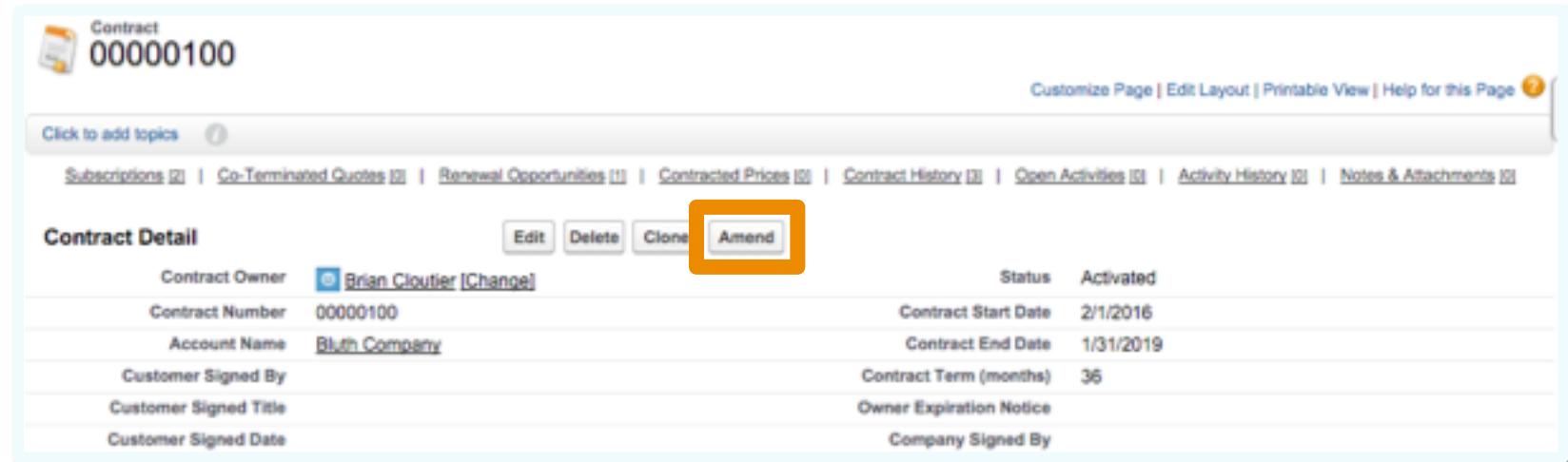
Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract



The screenshot shows the Contract Detail page for Contract 00000100. At the top, there are links for Subscriptions, Co-Terminated Quotes, Renewal Opportunities, Contracted Prices, Contract History, Open Activities, Activity History, and Notes & Attachments. Below this is the Contract Detail section, which includes fields for Contract Owner (Brian Cloutier), Contract Number (00000100), Account Name (Bluth Company), Customer Signed By, Customer Signed Title, Customer Signed Date, Status (Activated), Contract Start Date (2/1/2016), Contract End Date (1/31/2019), Contract Term (months) (36), Owner Expiration Notice, and Company Signed By. The 'Amend' button is highlighted with an orange box.

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

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Update Quote

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

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create Amendment Opportunity and Quote

Implementation Process Overview

Update Opportunity

Opportunity Detail

		Save	Cancel
Opportunity Owner	Brian Cloutier [Change]	Amount	\$20,250.00
Private	<input type="checkbox"/>	Expected Revenue	\$2,025.00
Opportunity Name	Amendment for contract #00000100	Close Date	1/18/2016
Account Name	Bluth Company	Next Step	
Type		Stage	Closed Won 
Lead Source		Probability (%)	100 
Created By	Brian Cloutier, 1/18/2016 10:14 AM	Primary Campaign Source	
Description		Last Modified By	Brian Cloutier, 1/18/2016 10:19 AM
Custom Links	Delivery Status		
▼ SteelBrick Information			
Primary Quote	Q-000003	Contracted	<input checked="" type="checkbox"/> 

EX34: Create Amendment Opportunity and Quote

Amend an existing contract to increase quantity of a subscription item on a future date

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

Co-Terminated Quotes		New Quote		Co-Terminated Quotes Help	
Action	Quote Number	Net Amount	Status	Created By	Primary
Edit Del	Q-00003	\$20,250.00	Draft	Brian Cloutier, 1/18/2016 10:14 AM	<input checked="" type="checkbox"/>

Create a Renewal Quote

Implementation Process Overview

Update Contract

- Marks contract as Renewal Quoted, generating a quote

Create a Renewal Quote

Update Contract

▼ SteelBrick Information

Renewal Forecast ✓

Renewal Opportunity Stage Proposal/Price Quote

Renewal Opportunity [View Renewal Opportunity](#)

Renewal Quoted ✓

Save **Cancel**

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

EX35: Create a Renewal Quote

Create a renewal quote based on the amended contract

Additional Contracting Information

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

Opportunity Detail

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

▼ SteelBrick Information

Primary Quote  Q-00001	Contracted  
---	--

Additional Contracting Information

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

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

Additional Contracting Information

Asset Conversion

Product Detail

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

Assets

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

Additional Contracting Information

Asset Conversion

Product Detail

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

Assets

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



Scenario

Contracting

If I want to automatically create an accurate Renewal Opportunity one month after the Contract is activated, what might my workflow rule look like? What action would it take?

Q: An Opportunity has been updated to Closed/Won and a workflow rule has marked the “Contract” checkbox to TRUE however a contract is not generated. Why?

- A. The quote was not marked as primary
- B. Subscription products does not exist on the quote
- C. Start Date was not populated on the quote
- D. All of the above



CPQ PLATFORM

- 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.



Call to Action

Focus on skill & knowledge related to exam objectives



Key Concepts

CPQ Platform > Contracting

Understand the Contracting operating process

- What creates a Subscription vs Asset record
- Best practice:
 - Generate Renewal Opportunity after contracted
 - Generate Renewal Quote start date one day after the contract end date
- Importance of preserving bundle structure for renewals

Related Knowledge Base Articles:

- [Contracting Overview](#)
- [Asset Amendments](#)
- [Renewal Overview](#)
- [Preserve Bundle Structure on Renewals](#)

Key Concepts

CPQ Platform > Automapping

Typical automapping use case

- Product > Quote Line
- custom Asset and Subscription fields for Renewals

Understand the Configuration Attribute assembly process

- Must create twin field on Subscription/Assets in order to reconfigure on renewal quotes

Related Knowledge Base Articles:

- [Auto-Mapping Twin Fields](#)



Key Concepts

CPQ Platform > Debugging

Common reasons why

- Quote Lines don't write back to the Opportunity
 - No Pricebook Entry on the Products
 - "Exclude from Opportunity" is marked on the Product record
 - \$0 products don't transfer
- Product Options don't appear
 - No Pricebook Entry on the Products
- Contract is not generated
 - Primary quote, Start Date or no subscription product present on the quote

All Else: Check the Active checkbox!

- ie. Quote Process, Quote Terms, Products, etc

Related Knowledge Base Articles:

- [Opportunity Product Troubleshooting](#)
- [Adding Options](#)
- [Contracts Overview](#)

Key Concepts

CPQ Platform > Miscellaneous

Localization

- Package supports all Salesforce Fully Supported Languages

Understand how to adding fields to the Quote Line Editor

- Setup > Create > Objects > Quote and Quote Lines > Field Sets and Page Layouts

Related Knowledge Base Articles:

- [Localization with SteelBrick Translation Overview](#)
- [Quote Line Editor Overview](#)



What's Next?

CPQ Specialist Fast Track



What's next?



Webinar Survey

1. Please rate the quality of the CPQ sessions: Product Setup and Bundle Structure

1 2 3 4 5

2. Please rate the quality of the CPQ sessions: Option Constraints, Configuration Attributes, Product Rules

1 2 3 4 5

3. Please rate the quality of the CPQ sessions: Pricing Waterfall, Pricing Method, Pricing Rules

1 2 3 4 5

4. Please rate the quality of the CPQ sessions: Quote Templates, Content and Sections, Line Item Columns, Quote Terms

1 2 3 4 5

5. Please rate the quality of the CPQ sessions: Contracting, Amendments, Renewals

1 2 3 4 5

6. Please rate your overall satisfaction with the session

1 2 3 4 5

[Close](#)

What's next?

Complete the Survey

Join the CPQ Community

The screenshot shows a Facebook-style group interface for "Salesforce CPQ Partner Enablement". At the top, there are options to "Post", "File", "Link", and "More". Below that is a "Share with Salesforce CPQ Partner Enablement" button and a "Share" button. The main content area has a header "Salesforce CPQ Partner Enablement" and a "Group Settings" link. There is an "Announcement" section with a message about renewal opportunities and quotes. A yellow callout box provides instructions for accessing the CPQ help topics. Below the announcement is a post from Harpreet Singh (@CSI Technologies) dated May 5, 2018, at 3:30 PM, asking about renewal quote pricing methods. Two other posts from Harpreet Singh and Rahul Avari are visible below it. On the right side, there are sections for "Members" (with a "Show All (918)" link), "Change Roles", "Group Records" (with a note about adding records), and "Group Files" (with links to screenshots and enablements). At the bottom, there is a "Recently Talked About" section listing CPQ, Connect Cancel, Cancel, Connect, and SF CPQ.

Salesforce CPQ Partner Enablement

Post File Link More

Show with Salesforce CPQ Partner Enablement Share

Show All Updates

Harpreet Singh (@CSI Technologies)

When I create a Renewal Opportunity and Renewal Quote by checking the corresponding checkboxes on Contract, it creates both records successfully. But I have few questions:

1. On the Renewal Quote, I am not able to edit the List Price on Quote Line using the Edit Lines option, while I was able to edit the List Price on the Original Quote. Is that allowed to edit the List price on Renewal Quote?
2. Also in my original Quote, I had increased the List Price of the Segmented Product for all Months. The Subscription on the Contract also shows the increased price. However on the Renewal Quote, it is showing the Product List Price as the Quote Line List Price.

Show More

Comment Like Share Edited June 1, 2018 at 6:52 AM

Harpreet Singh (@CSI Technologies)

@Salesforce CPQ Partner Enablement @Salesforce CPQ Implementation Resources (Photo)

Like June 4, 2018 at 2:21 AM

Rahul Avari (Avari)

@Harpreet Singh (@CSI Technologies) Can you try Renewal Pricing Method as Unit on Account and see if this is what you are looking for.

Like June 4, 2018 at 3:29 AM

Harpreet Singh (@CSI Technologies)

@Rahul Avari (Avari) Yeah, I tried using "Unit" on Renewal Pricing Method. It didn't work for me though. The quote line price is still showing the original price.

Manager

Members Show All (918)

Add/Remove Members Change Roles

Group Records

No records yet! Learn about adding records to groups.

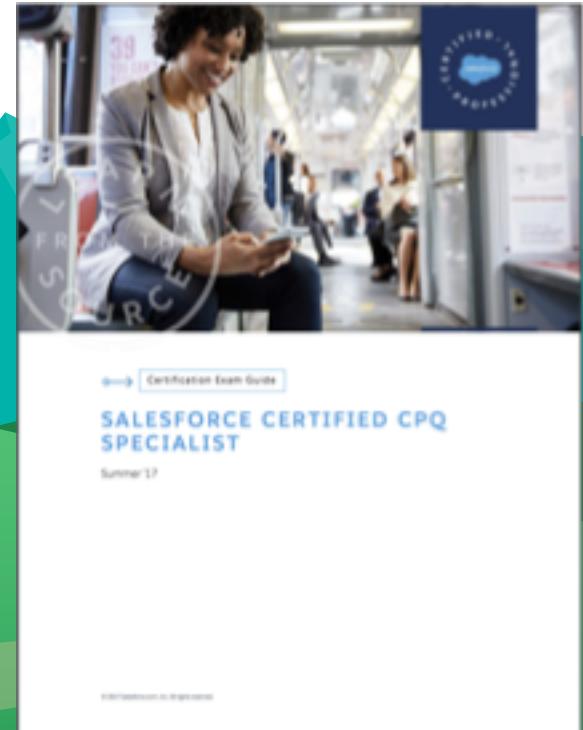
Group Files Show All (23)

Screen Shot 2018-0...
Enablements
Quantity...
Language
CPQ Partner Train...

Recently Talked About

CPQ
Connect Cancel
Cancel
Connect
SF CPQ

What's next?



Thank you and Good Luck!

Complete the Survey

Join the CPQ Community

Study the Material

Register and Take the Exam!



