CPQ Knowledge Base Study References

Click on the topic below to reach each resource

Adding Features
Adding Options
Changing Option Selection Method
Controlling when Bundle Configuration is Required
An Overview of Product Bundles
Adding Option Constraints
Check Prior Purchases & Option Constraints (To Avoid Creating Product Rules)
Product Validation Rules
Configuration Selection Rules
Alert Rules
Overview of Product Rules
Create a Product Rule Based on a Prior Purchase

Product Actions

Configuration Attributes
Price Rules from Configuration Attribute
Configuration Attribute Layouts
Hiding Options in Configurator
Auto-Mapping: Twin Fields
Bundle & Feature Level Field Sets
Product Managed Fields
Smart Start
Product Managed Fields
Setting Configuration Type
Package Product Code
Package Product Description
Subscription Pricing
Guided Selling Overview
Building a Workflow to Map Quote Process
Dynamic Questions in Guided Selling
Guided Selling Use Case
Custom Actions
Search Filters
Dynamically Displaying Quote Line Columns
Draft Watermark Added to Quote PDF
Creating Template Sections
Translating Quote Templates
Quote Template Fields
Setting Document Output Formats
Creating Dynamic Proposals
Custom HTML Template Content Troubleshooting

Receiving error when previewing Quote Template: Invalid conversion from runtime type Boolean String
Create Template Content
Multiple Quote Term Sections
Building Quote Term Conditions
Creating Standard Terms
Lock Quote Term from Edits
Merge Fields
Generate Documents
Filtering Line Items to Display in Separate Sections
Line Item Groups
Automatically Grouping Line Items in Quote Templates
Configure Quote Line Item Columns
Block Pricing
Discount Methods: Discount Schedules Overview
Combine Block Pricing with Discount Schedules
Percent of Total Pricing
Cost & Markup Pricing
Price Rules 1 - Overview, Price Conditions & Price Actions
Lookup Object / Table
Real-Time Price Rules in Configuration
Writing Advanced-Calculator-Compatible Formulas
Overview of Product Pricing
Writing Advanced-Calculator-Compatible Formulas
Quote Line Managed Fields
Adding Summary Variable
Original Price - MSRP Pricing
User-Defined Discount Schedules
Discount Methods: Discount Schedules Overview
Multi-Dimensional Quoting (MDQ)
Configure Steelbrick CPQ Package-Level Settings
Making MDQ Products Appear in the Standard Table by Default
Segmented Products: Yearly
Custom Segments in MDQ
Discount Methods: Discount Schedules Overview
Quote Line Managed Fields
Overview of Product Pricing
Discount Methods: Discount Schedules Overview
Percent of Total Pricing
Monthly & Daily Prorate Precision
Subscription Pricing
Effective Quantity
Discount Methods: Partner Discounts
Quote Calculation & Triggering Calculations
Percent of Total Pricing
Contracted Pricing
Ignore Parent Contracted Prices

Auto-Generating a Contracted Price
Q/A: Auto-Mapping: Twin Fields
Change Auto-Populate Behavior in New Quotes
Opportunity Products Troubleshooting
Edit Lines Page
Bundle & Feature Level Field Sets
Quote Line Editor Overview
Permissions on Profiles
Field-Level Security
Contracts Overview
Contracting Assets
Renewal Overview 1 - Setup
Preserve Bundle Structure on Renewal Quotes
Asset Amendments
Localization with SteelBrick - Translation Overview