

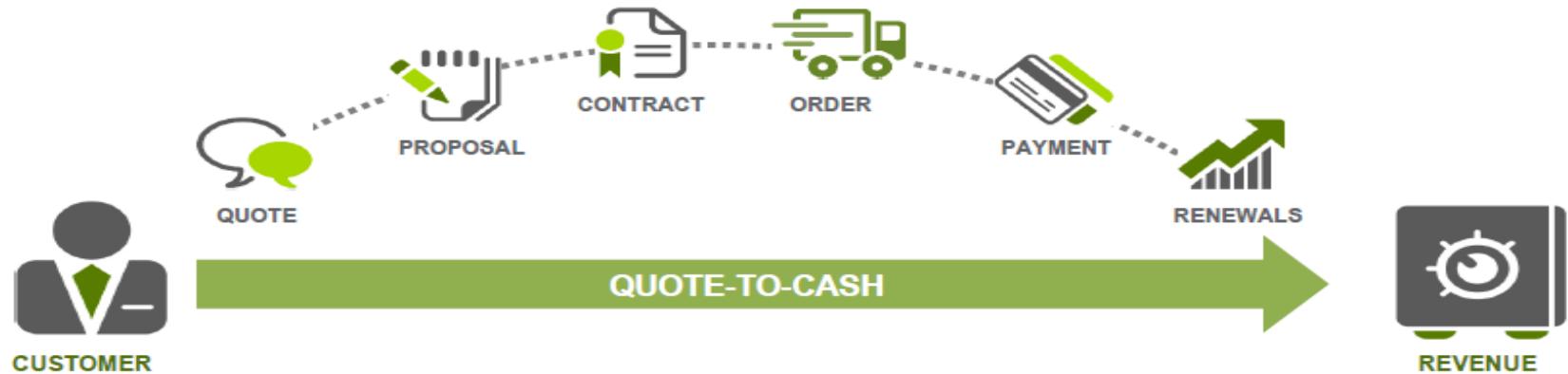
Salesforce CPQ Training

By

Satyanarayana P

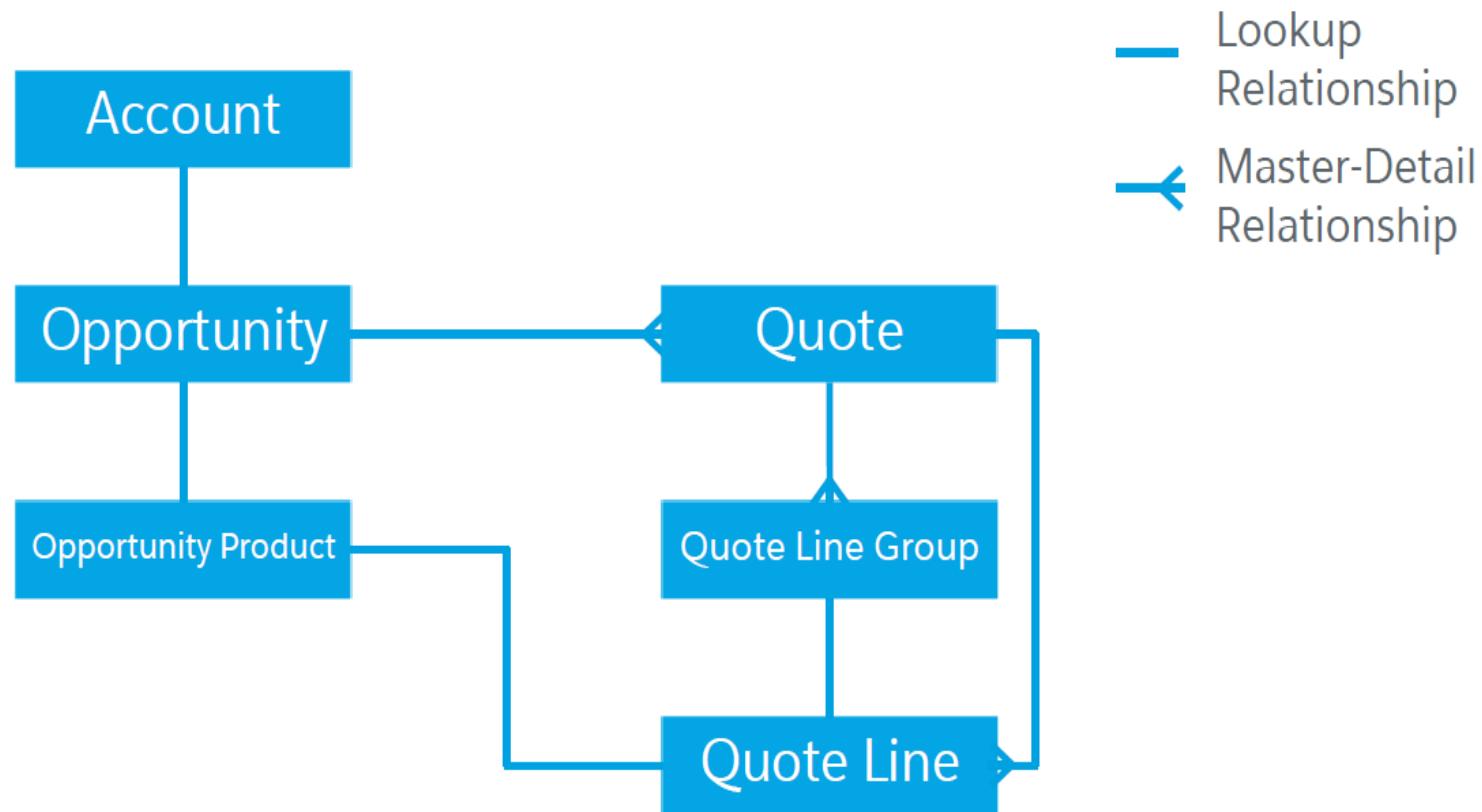


What is Quote-to-Cash?

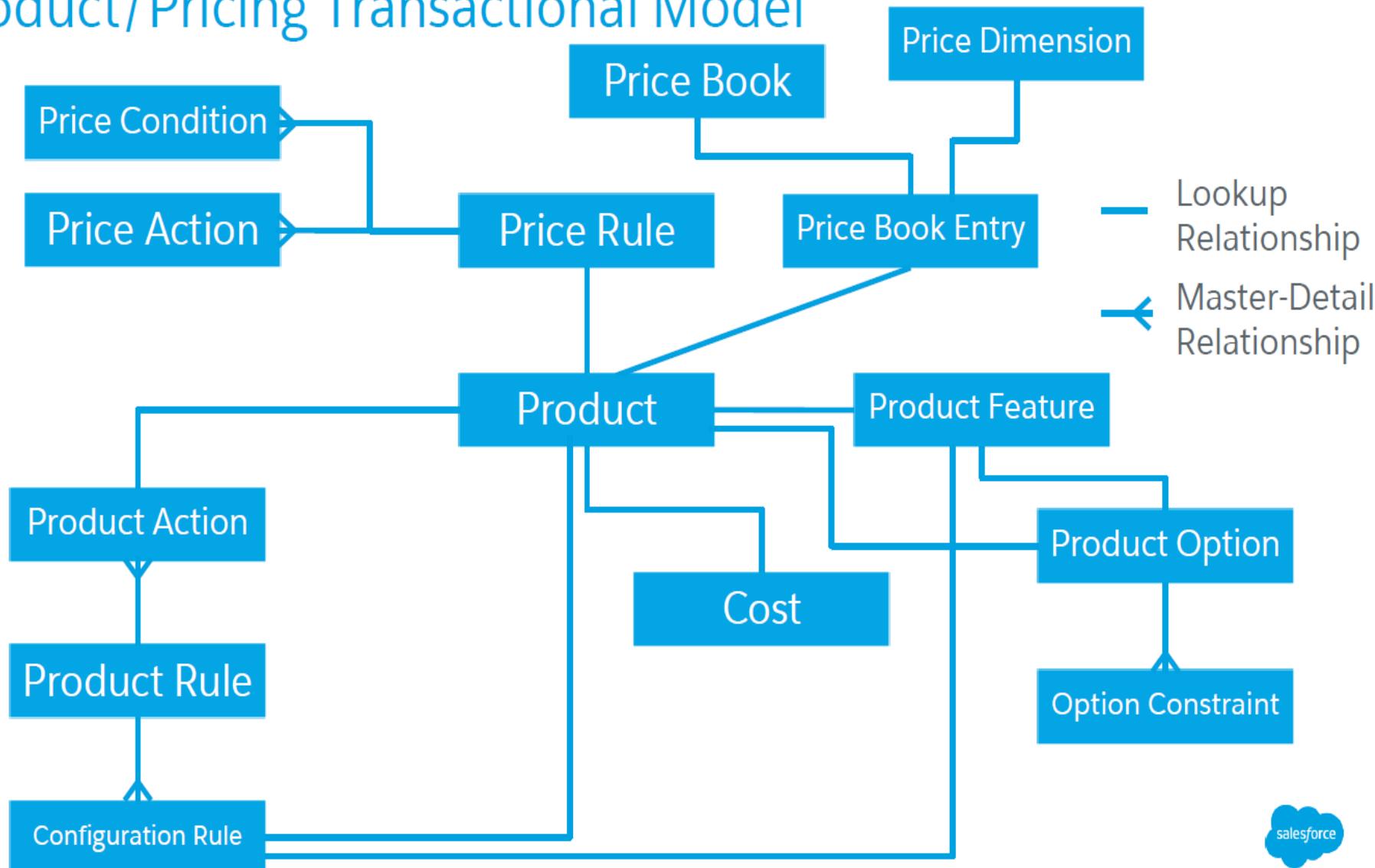


... the
end-to-end business process
between
buyer's interest in a purchase and
realization of revenue.

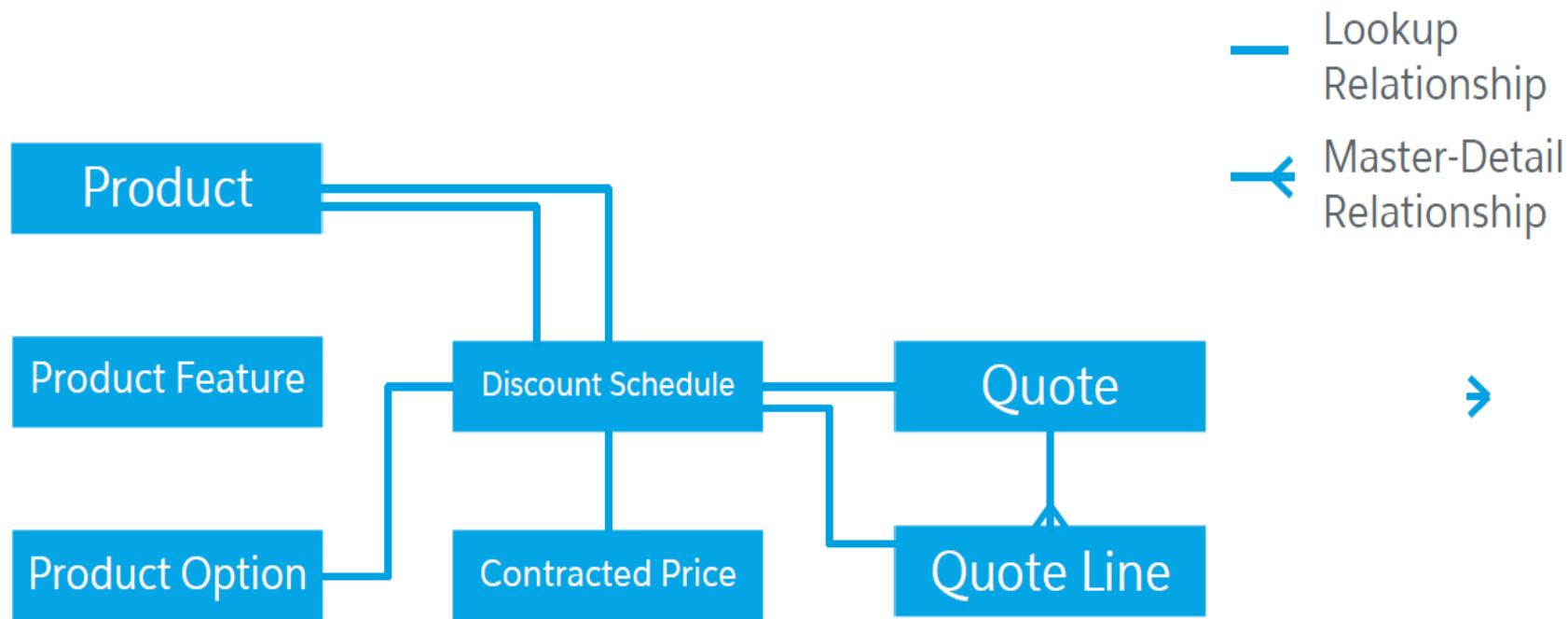
Quote/Account Structure



Product/Pricing Transactional Model



Discount Schedule Object Model



Creating and Configuring SFDC Development Org

Package Settings

Setup a Salesforce Developer Edition

<https://developer.salesforce.com/signup>

Installation and Layout

<http://steelbrick2.force.com/InstallPremium>

Training Kit -

<https://ap5.lightning.force.com/packagingSetupUI/ipLanding.app?apvId=04t36000000DdjM>

Online Videos

<https://help.salesforce.com/apex/HTTrainingModulesDetail?courseId=a1S0M00000349PFUAY&LpId=a1t30000002RYorAAG>

<https://help.salesforce.com/HTTrainingLearningPathDetail?id=a1t30000002RYor>

Package Settings

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

Installed Packages														
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	 TrainingKit	Salesforce CPQ	1.0 (Beta 4)	BMC3	Free	N/A	N/A	N/A	6/13/2018 6:10 AM	<input checked="" type="checkbox"/>	0	0	0	Not Passed
Description Products and Page Layouts to facilitate Salesforce CPQ product training.														
Uninstall	 Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	6/13/2018 6:45 AM	<input checked="" type="checkbox"/>	0	0	0	Not Passed
Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...														
Uninstall Configure Manage Licenses	 Salesforce CPQ	Salesforce CPQ	214.4	SBQQ	Trial	99000000	2	9/11/2018 4:30 AM	6/13/2018	<input type="checkbox"/>	1	22	76	Passed
Description Salesforce CPQ simplifies configuration and ensures pricing and quoting accuracy. Sales reps reduce errors, improve productivity, and close more deals...														

Package Settings

SteelBrick CPQ Settings

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



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

Documents

Groups

Line Editor

Plugins

Pricing and Calculation

Subscript

Currency Symbol ⓘ

Use Ina

Unit Price Scale ⓘ

Calculate Ir

Enable Quick Calculate ⓘ

Disable E
Calculati

Use Legacy Calculator ⓘ

[Authorize new calculation service](#)



Allow Access?

SteelBrick CPQ is asking to:

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

Do you want to allow access for
brian@cloutier012015.com? (Not you?)

Deny

Allow

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

Package Settings

SteelBrick CPQ Settings

Save Cancel

Documents	Groups	Line Editor	Plugins	Pricing and Calculation	Subscriptions and Renewals	Quote	Additional Settings
Document Folder ⓘ	Quotes				Document Service Endpoint ⓘ		
Attachment Target ⓘ	Document only				Hide Document Name ⓘ	<input type="checkbox"/>	
Post to Feed? ⓘ	<input type="checkbox"/>				Full Page Preview ⓘ	<input checked="" type="checkbox"/>	
Allow Output In Different Languages ⓘ	<input type="checkbox"/>						
Mass Document User Name	Request Authorization						
Click Request Authorization to allow SteelBrick CPQ to mass generate and send quote documents on your behalf when you are not logged into Salesforce. You must click Save after you have requested authorization.							

Package Settings

SteelBrick CPQ Settings

Save Cancel

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

Hide Renewed Assets When Editing

Actions Column Placement

Visualize Product Hierarchy

Enable Multi Line Delete

Preserve Bundle Structure

Product Configuration Initializer

Keep Bundle Together

Enable Asset Upgrades

Package Settings

Settings Editor

Salesforce CPQ

Save Cancel

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

Satyanarayana Pu...

Setup

Help

Sales

- Service
- Marketing
- App Launcher
- Community
- Site.com
- Salesforce Chatter
- Content
- Salesforce CPQ**
- AppExchange
- App Menu**
- Developer Community
- Success Community

ions

Products

Reports

Da

endations

More

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our phone with
orce.



CPQ

Search...

Search

⚡ Switch to Lightning Experience

Satyanarayana Pu...

Setup

Help

Salesforce CPQ

Home

Accounts

Opportunities

Quotes

Solution Groups

Discount Schedules

Quote Templates

Products

Product Rules

Dashboards

Documents



Satyanarayana Pusuluri

Product Page Layout

[Features \[3\]](#) | [Options \[5+\]](#) | [Option Constraints \[0\]](#) | [Configuration Attributes \[0\]](#) | [Costs \[0\]](#) | [Block Prices \[0\]](#) | [Standard Price \[1\]](#) | [Price Dimensions \[0\]](#) | [Price Books \[1\]](#)

Product Detail

Product Name	Apple MacBook Pro	Active	<input checked="" type="checkbox"/>
Product Code	AP-MBPRO	Product Family	Hardware
Created By	TrainingKit, 9/16/2016 3:34 AM	Last Modified By	Satyanarayana Pusuluri, 9/16/2016 3:49 AM
Product Description	15" Apple MacBook Pro (2016)		

▼ SteelBrick Information

Pricing Method  List	Pricing Method Editable  <input type="checkbox"/>
Quantity Editable  <input checked="" type="checkbox"/>	Exclude From Opportunity  <input type="checkbox"/>
Non Discountable  <input type="checkbox"/>	Hidden  <input type="checkbox"/>
Discount Schedule  List	Lock Description  <input type="checkbox"/>
Price Editable  <input type="checkbox"/>	Optional  <input type="checkbox"/>
Cost Editable  <input type="checkbox"/>	Sort Order  List

▼ SteelBrick Subscriptions

Subscription Pricing  List	Percent Of Total (%)  List
Subscription Term  List	Percent Of Total Base  List
Term Discount Schedule  List	Percent Of Total Category  Hardware
Renewal Product  List	Include In Percent Of Total  <input type="checkbox"/>
Percent Of Total Constraint  List	Exclude From Percent Of Total  <input type="checkbox"/>

▼ SteelBrick Configuration

Component  <input type="checkbox"/>	Configuration Fields
Configuration Event  Always	Configuration Form Title  List
Configuration Type  Allowed	Configured Code Pattern  List
Option Layout  List	Disable Reconfiguration  <input type="checkbox"/>
Option Selection Method  Click	

▼ SteelBrick Assets

Asset Conversion  One per quote line

Change the Page Layouts for -

Products -- Training product Layout

Account -- Training

Opportunity -- Training

Contract-- Training

Salesforce Fields and Product Families

Product Code	Subscription Pricing	Subscription Term	Subscription Category	Subscription Percent	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			

EX3: Create Product Families

1. Navigate to Setup | Customize | Products | Fields
2. Click Product Family field in Product Standard Fields

Product Standard Fields						
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
Edit	<u>Active</u>	IsActive	Checkbox			<input type="checkbox"/>
	<u>Created By</u>	CreatedBy	Lookup(User)			<input type="checkbox"/>
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)			<input type="checkbox"/>
Edit	<u>Product Code</u>	ProductCode	Text(255)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit	<u>Product Description</u>	Description	Text Area(4000)			<input type="checkbox"/>
Replace Edit	<u>Product Family</u>	Family	Picklist			<input type="checkbox"/>
Edit	<u>Product Name</u>	Name	Text(255)		<input checked="" type="checkbox"/>	<input type="checkbox"/>

EX3: Create Product Families

3. Click New in Product Family Picklist Values
4. Add the following values, then Save

Add Picklist Values

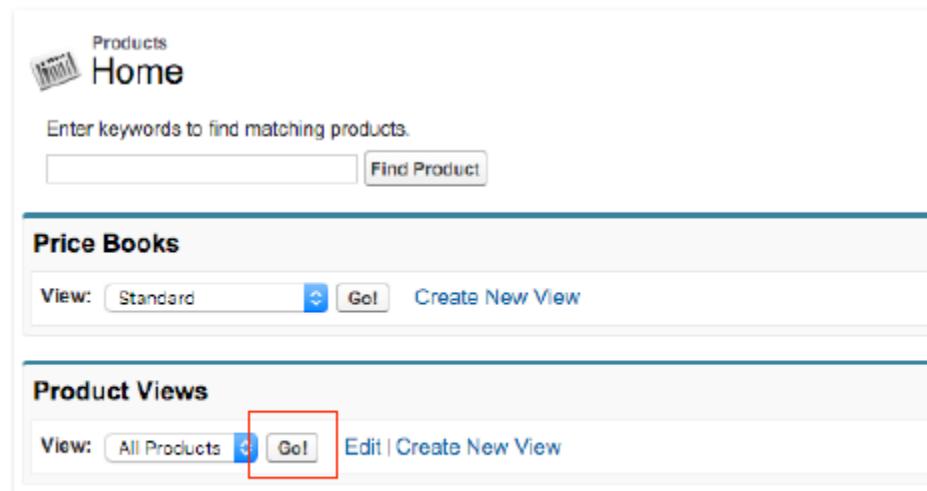
Product Family

Add one or more picklist values below. Each value should be on its own line.

Hardware
Software
Service
Support
Consumable

EX4: Assign Product Families

1. Navigate to Products Tab
2. Click Go! in Product Views



EX4: Assign Product Families

3. Change number of displayed products
4. Set Admin Hour product family to Support

Add		A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All			
Action	Product Name ↑	Product Code	Product Description		Product Family
<input type="checkbox"/> Edit Deactivate	Admin Hour	ADMINHOUR	15" Apple MacBook Pro (2016)		Support
<input type="checkbox"/> Edit Deactivate	Apple MacBook Pro	AP-MBPRO			
<input type="checkbox"/> Edit Deactivate	Apple Magic Mouse	AP-MAGICMOUSE			
<input type="checkbox"/> Edit Deactivate	Apple Thunderbolt Display	AP-TBDISPLAY			
<input type="checkbox"/> Edit Deactivate	Apple UK Keyboard	AP-UKKEYBOARD			

EX4: Assign Product Families

Product Code	Family	Product Code	Family	Product Code	Family
ADMINHOUR	Support	CPU28GHZI7	Hardware	RAM16GB	Hardware
AP-MBPRO	Hardware	ITPROPACK	Service	RAM8GB	Hardware
AP-MAGICKMOUSE	Hardware	LJ-MAINTKIT	Consumable	SSD256	Hardware
AP-TBDISPLAY	Hardware	LJ-PAPERA4	Consumable	SSD512	Hardware
AP-UKKEYBOARD	Hardware	LJ-PAPERLETTER	Consumable	WARRANTY	Support
AP-USKEYBOARD	Hardware	LJ-PRINTER	Hardware	WIFIAP	Hardware
CLOUDSTORAGE	Software	LJ-TONER	Consumable	WIFIINSTALL	Service
CPU22GHZI7	Hardware	LDWARRANTY	Support	WIFIROUTER	Hardware
CPU25GHZI7	Hardware	MS-OFFICE365	Software		

Points to remember:

1. Non Discountable → Would not allow discounting
2. Price Editable → If allowed, they can edit the prices
3. Optional checkbox means – This product will not contribute to the overall price. It can be used for Upsell and does not add to total cost. Optional can be made at the time of quote set up also
4. Steelbrick Subscription Section - Sell a product monthly, yearly, daily and so on. It does the maths automatically based on duration.
5. Fixed price means this much per month,
6. Term is always defined in month

More CPQ Product Fields

https://help.salesforce.com/articleView?id=cpq_product_fields.htm&type=5

\$Y for 12 Months

 Product
Cloud Storage 1GB

[« Back to List: Products](#)

[Features \[0\]](#) | [Options \[0\]](#) | [Option Constraints \[0\]](#) | [Configuration Attributes \[0\]](#) |

Product Detail

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

Product Name **Cloud Storage 1GB**

Product Code **CLOUDSTORAGE**

Created By **TrainingKit, 9/14/2017 12:29 AM**

Product Description

▼ SteelBrick Information

Pricing Method  **List**

Quantity Editable 

Non Discountable 

Discount Schedule 

Price Editable 

Cost Editable 

▼ SteelBrick Subscriptions

Subscription Pricing  **Fixed Price**

Subscription Term  **12**

Term Discount Schedule 

“Percent of Total category” is not related to Product Family. It is related by “Percent of Total category” of different product. LDWARRANTY is percentage of AP-TBDISPLAY. Depends on how much hardware they have bought and is not fixed. Deciding price based on others.

 Product
Loss and Damage Warranty

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

[« Back to List: Products](#)

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

Product Detail		Edit Delete Clone Clone with Related	
Product Name	Loss and Damage Warranty	Active	<input checked="" type="checkbox"/>
Product Code	LDWARRANTY	Product Family	Support
Created By	TrainingKit, 9/14/2017 12:29 AM	Last Modified By	kirti rathor , 9/14/2017 3:46 AM
Product Description			

▼ SteelBrick Information

Pricing Method  List	Pricing Method Editable  <input type="checkbox"/>
Quantity Editable  <input checked="" type="checkbox"/>	Exclude From Opportunity  <input type="checkbox"/>
Non Discountable  <input type="checkbox"/>	Hidden  <input type="checkbox"/>
Discount Schedule  List	Lock Description  <input type="checkbox"/>
Price Editable  <input type="checkbox"/>	Optional  <input type="checkbox"/>
Cost Editable  <input type="checkbox"/>	Sort Order  <input type="checkbox"/>

▼ SteelBrick Subscriptions

Subscription Pricing  Percent Of Total	Percent Of Total (%)  5.000%
Subscription Term  12	Percent Of Total Base  List
Term Discount Schedule  List	Percent Of Total Category  Hardware

Add values to subscription category PickList – These are not related to product family.

On a renewal basis of 12 months, charge .5% of hardware

The screenshot shows a software interface with various configuration options. A red box highlights the 'Subscription Term' field set to 12 and the 'Percent Of Total (%)' field set to 0.5000%. An arrow points from the 'Subscription Term' field to the 'Percent Of Total (%)' field.

Subscription Pricing: Percent Of Total
Subscription Term: 12
Percent Of Total Base: List
Subscription Type: Renewable
Term Discount Schedule
Term Discount Level

Percent Of Total (%): 0.5000%
Percent Of Total Category: Hardware
Percent Of Total Target
Include In Percent Of Total
Exclude From Percent Of Total
Percent Of Total Constraint

Creating a Quote

Create Quote Process

- Create an Account and Contact
- Create an Opportunity
- Create a Quote (and review Quote Details section)
- Add Products to the Quote (and review Line Editor)
- Review Related Lists:
 - Quote Line (on Quote)
 - Quote (on Opportunity)
 - Products (on Opportunity)

Creating a Quote

1. Navigate to Opportunities tab
2. Click name of new opportunity

The screenshot shows the Opportunities tab selected in the top navigation bar. A dropdown menu labeled "Create New..." is open. On the left, there's a "Recent Items" sidebar with links to "First Big Sale", "Bluth Company", "Michael Bluth", "Standard Price Book", and "Standard". The main area displays "Recent Opportunities" with a table showing one row: Opportunity Name "First Big Sale" and Account Name "Bluth Company". The "Opportunity Name" field is highlighted with a red box.

Creating a Quote

3. Click New Quote

The screenshot shows the Quotes section. At the top, there's a "SteelBrick Information" panel with fields for "Primary Quote", "Renewed Contract", "Amended Contract", "Contracted", "Renewal", and "Quote Pricebook Id". Below this are buttons for "Edit", "Delete", and "Clone". In the center, there's a "Quotes" section with a "New Quote" button highlighted by a red box. At the bottom, it says "No records to display". On the right, there's a "Quotes Help" link.

Creating a Quote

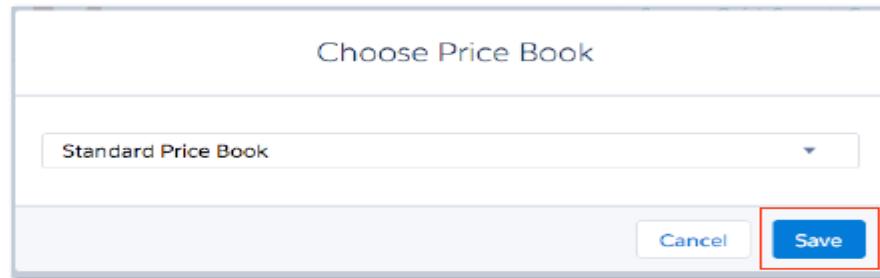
4. Set field values, then Save

Information ! = Required Information

Primary <input checked="" type="checkbox"/>	Opportunity <input type="text" value="First Big Sale"/>
Status <input type="text" value="Draft"/>	Type <input type="text" value="Quote"/>
Expires On <input type="text" value="2/14/2016"/> [1/15/2016]	Payment Terms <input type="text" value="Net 30"/>
Sales Rep <input type="text"/>	Start Date <input type="text" value="2/1/2016"/> [1/15/2016]
Primary Contact <input type="text"/>	
Subscription Term <input type="text" value="12"/>	
Delivery Method <input type="text" value="--None--"/>	
Master Contract <input type="text"/>	

Creating a Quote

5. Click Save to Choose Price Book popup



6. Click Add Products

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

Creating a Quote

8. Enter these quantities, then click Calculate

The screenshot shows a software interface titled "Quote Line Editor" for creating a quote. The top navigation bar includes buttons for Save, Quick Save, Cancel, a clipboard icon, Add Products, Calculate (which is highlighted with a red box), Delete Lines, and Groups. The main area is a table with columns for Product Code, Product Name, Quantity, List Unit Price, Additional Disc., Net Unit Price, and Net Total. Seven rows of products are listed:

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	Star	Print	Copy
1	LDWARRANTY	Loss and Damage Warranty	1.00	\$27.50		\$27.50	\$27.50	☆	🖨️	🖨️
2	LJ-MAINTKIT	LaserJet Maintenance Kit	2.00	\$20.00		\$20.00	\$40.00	☆	🖨️	🖨️
3	LJ-PAPERLETTER	LaserJet Paper Letter	10.00	\$10.00		\$10.00	\$100.00	☆	🖨️	🖨️
4	LJ-PRINTER	LaserJet Printer	2.00	\$275.00		\$275.00	\$550.00	☆	🖨️	🖨️
5	LJ-TONER	LaserJet Toner Cartridge	4.00	\$125.00		\$125.00	\$500.00	☆	🖨️	🖨️
6	MS-OFFICE365	Microsoft Office 365	20.00	\$10.00		\$120.00	\$2,400.00	☆	🖨️	🖨️

SUBTOTAL: \$3,617.50

Creating a Quote

9. Click Save and review the Quote Lines related list

Quote Lines							Quote Lines Help (?)	
Action	Line Name	Number	Group	Product	List Unit Price	Quantity	Customer Total	Net Total
Edit Del	QL-0000048	1		Loss and Damage Warranty	\$27.50	1.00	\$27.50	\$27.50
Edit Del	QL-0000049	2		LaserJet Maintenance Kit	\$20.00	2.00	\$40.00	\$40.00
Edit Del	QL-0000050	3		LaserJet Paper Letter	\$10.00	10.00	\$100.00	\$100.00
Edit Del	QL-0000051	4		LaserJet Printer	\$275.00	2.00	\$550.00	\$550.00
Edit Del	QL-0000052	5		LaserJet Toner Cartridge	\$125.00	4.00	\$500.00	\$500.00
Edit Del	QL-0000053	6		Microsoft Office 365	\$10.00	20.00	\$2,400.00	\$2,400.00

Reviewing the Opportunity

10. Navigate to the opportunity and review Quote and Products related lists

Products (Standard Price Book)						Products (Standard Price Book) Help (?)		
Action	Product	Quantity	Sales Price	Date	Line Description			
Edit Del	LaserJet Maintenance Kit	2.00	\$20.00					
Edit Del	LaserJet Paper Letter	10.00	\$10.00					
Edit Del	LaserJet Printer	2.00	\$275.00					
Edit Del	LaserJet Toner Cartridge	4.00	\$125.00					
Edit Del	Loss and Damage Warranty	1.00	\$27.50					
Edit Del	Microsoft Office 365	20.00	\$120.00					

Configuration

Product Bundles

Q: What if you wanted to sell multiple laptops?

A: Create a product bundle to sell a configured package!

Benefits:

- Enforce configuration rules
- Constrain certain product options
- Guarantee that the sales users quote a valid set of product and services, with pricing accuracy
- Remind the sales users about what products and services can be sold with the bundle (upsells, cross-sells)

Features & Options

Configure Products

IT Professional Pack

Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> <input type="button" value=""/>	1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)
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-UKKEYBOARD	Apple UK Keyboard	\$50.00
<input type="checkbox"/>	1.00	AP-MAGICMOUSE	Apple Magic Mouse	\$80.00

Filter

Feature:

Product Code:

Product Name:

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 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.

EX6: Create Features

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

The screenshot shows the SteelBrick Assets interface. At the top, there is a section titled "SteelBrick Assets" with a dropdown arrow. Below it, a message says "Asset Conversion ⓘ One per quote line". A horizontal toolbar contains four buttons: "Edit", "Delete", "Clone", and "Clone With Related". To the right of the toolbar is a link "Features Help ⓘ". The main area is divided into two sections: "Features" and "Options". The "Features" section has a button labeled "New Product Feature" which is highlighted with a red rectangle. Below this button, a message says "No records to display". The "Options" section has a button labeled "New Product Option" and a message saying "No records to display".

EX6: Create Features

3. Set field values, then Save

Information = Required Information

Feature Name	Computers
Min Options	0
Max Options	
Category	--None--
Discount Schedule	
Number	10
Configured SKU	IT Professional Pack
Option Selection Method	--None--
Dynamic Option Filter Field Set	--None--
Dynamic Option Lookup Field Set	--None--

EX6: Create Features

4. Create remaining features

Features		New Product Feature	Features Help	
Action	Feature Name	Min Options	Max Options	Number
Edit Del	Computers	0		10
Edit Del	Peripherals	0		20
Edit Del	Printing	0		30
Edit Del	Networking	0		40
Edit Del	Subscriptions	0		50

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.
Subscription 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.

Type → Three options

1. **Component** is directly related to quantity of Bundle. Quantity will be factor of bundle. 2 HD per laptop... 5 laptop 10 HD
2. **Accessory** is unrelated. Like warranty.. 1 warranty for all laptops. This prod Is mandatory. Eg Toner is mandatory in Printer.
3. **Related products** may not be needed.. May or may not need. Accessory is mandatory and relatead prod is not.

Required – Mandatory

Selected – By default included. Eg- Macbook pro is by default selected

Qty Ediatable – U can change the default selected values

Min And Max qty (Admin Hours)

Bundled -

This does not add to the cost. It will be free. Installation media will be given with laptop but not charged.

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

EX7: Create Options

1. Navigate to the ITPROPACK product
2. Click New Product Option in the Options related list

Features		New Product Feature		Features Help
Action	Feature Name	Min Options	Max Options	Number
Edit Del	Computers	0		10
Edit Del	Peripherals	0		20
Edit Del	Printing	0		30
Edit Del	Networking	0		40
Edit Del	Subscriptions	0		50

Options		New Product Option	Options Help
No records to display			

EX7: Create Options

3. Set field values, then Save

Information ■ = Required Information

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

EX7: Create Options

4. Create remaining options per the next 3 slides

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		

EX7: Create Options

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			

EX7: Create Options

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

Navigate to the ITPROPACK product

Set field values, then Save

▼ Salesforce CPQ Configuration

Component	Configuration Fields
Configuration Type Allowed	Configuration Form Title
Configuration Event Always	Configured Code Pattern
Option Layout	Disable Reconfiguration
Option Selection Method Click	Configured Description Pattern

Configuration Event:

After the product is selected. we click at the gear icon to open the Bundle Configuration

To change this behavior and Display the page as soon as the prod is selected

Goto IT propack

Some combination don't make sense. Try out yourself what diff config do

Allowed + Add → only one option to change, at the first time

Option Layout

The screenshot shows the 'SteelBrick Configuration' section with the following settings:

- Component: Click (checkbox icon)
- Configuration Event: Always
- Configuration Type: Allowed
- Option Layout: Sections (button icon)
- Option Selection Method: Click (button icon)

Option Selection Method:

1. Click – Shows the checkboxes
2. Add- Shows the button which further opens the options

Option Layout Method:

1. Section – As section
2. Tab- On Different tabs
3. As wizard

Action	Option Name	Number	Optional SKU	Feature	Type	Min Quantity	Max Quantity	Price Editable
Edit Del	PO-000007	30	Microsoft Office 365	Subscriptions	Related Product			No
Edit Del	PO-000008	10	LaserJet Printer	Printing	Accessory			No
Edit Del	PO-000009	40	Apple Thunderbolt Display	Peripherals	Related Product			No
Edit Del	PO-000016	20	LaserJet Toner Cartridge	Printing	Accessory			No
Edit Del	PO-000017	10	Warranty	Subscriptions	Accessory			No
Edit Del	PO-000019	40	LaserJet Paper Letter	Printing	Related Product			No
Edit Del	PO-000020	40	Barracuda NextGen Firewall X300	Networking	Accessory			No
Edit Del	PO-000021	10	WiFi Router	Networking	Accessory			No
Edit Del	PO-000022	10	Apple US Keyboard	Peripherals	Related Product			No
Edit Del	PO-000023	30	LaserJet Maintenance Kit	Printing	Accessory			No
Edit Del	PO-000035	10	Apple MacBook Pro	Computers	Related Product			No
Edit Del	PO-000036	50	LaserJet Paper A4	Printing	Related Product			No
Edit Del	PO-000052	40	Cloud Storage 1GB	Subscriptions	Related Product			No
Edit Del	PO-000057	20	WiFi Access Point	Networking	Accessory			No
Edit Del	PO-000064	20	Loss and Damage Warranty	Subscriptions	Accessory			No
Edit Del	PO-000066	50	LTE Hotspot	Peripherals	Related Product			No
Edit Del	PO-000067	50	Admin Hour	Subscriptions	Accessory	10.00		No
Edit Del	PO-000068	50	Apple Remote Desktop	Networking	Related Product			No
Edit Del	PO-000069	20	Apple UK Keyboard	Peripherals	Related Product			No
Edit Del	PO-000070	20	Apple MacBook	Computers	Related Product			No
Edit Del	PO-000071	30	Apple Magic Mouse	Peripherals	Related Product			No
Edit Del	PO-000073	30	WiFi Installation	Networking	Component			No

Other Config Considerations

Configuration Event

- When are users prompted to complete config?

Nested Bundles

- Bundles within bundles

Dynamic Bundles

- Users may add options through a filtered lookup

Favorites

- Saved, sharable configurations

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

Option Constraint Use Cases

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

Subscriptions					
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE	
<input checked="" type="checkbox"/>	1.00	WARRANTY	Warranty	\$0.00	
<input type="checkbox"/>	1.00	LDWARRANTY	Loss and Damage Warranty	\$0.00	
<input type="checkbox"/>	1.00	MS-OFFICE365	Microsoft Office 365	\$10.00	

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 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.

1. Dependency – If Wifi Router is selected then only WiFi AP and WIFI installation should be enabled
2. Exclusion – if Warranty is selected, the other should be disabled and vice versa.

EX8: Create Option Constraints

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

Edit Del	PO-000023	Subscriptions	Cloud Storage 1GB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Related Product	40
Edit Del	PO-000024	Subscriptions	Admin Hour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20.00 Accessory	50
Edit Del	PO-000025		Insured Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1.00 Accessory	10

Option Constraints		New Option Constraint	Option Constraints Help
No records to display			

Configuration Attributes		New Configuration Attribute	Configuration Attributes Help
No records to display			

3. Set field values, then click Save & New

Option for Installation

Information ■ = Required Information

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

Option for Router

Access Point Option

Information ■ = Required Information

Constraint Name	WiFi Access Point require WiFi Router	Active	<input checked="" type="checkbox"/>
Constrained Option	PO-000018	Configured SKU	IT Professional Pack
Constraining Option	PO-000017	Type	Dependency
Check Prior Purchases	<input checked="" type="checkbox"/>	Option Constraint Group	

Router Option

EX8: Create Option Constraints

5. Set field values, then Save

Information ■ = Required Information

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

Option Constraint Grouping Use Case

Our company would like to guarantee that the Cloud Storage may not be selected unless both a WiFi Router and WiFi Access Point have been selected.

Option Constraint Grouping Use Case

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

Subscriptions					
QUANTITY	PRODUCT CODE	PRODUCT NAME			
<input type="checkbox"/> 1.00	WARRANTY	Warranty			
<input type="checkbox"/> 1.00	LDWARRANTY	Loss and Damage			
<input type="checkbox"/> 1.00	MS-OFFICE365	Microsoft Office			
<input type="checkbox"/> 1.00	CLOUDSTORAGE	Cloud Storage 1GB			
20.00	ADMINHOUR	Admin Hour			

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

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

Option Constraint Grouping

Implementation Process Overview

Create Option Constraints

- Defines two related option constraints in the ITPROPACK bundle



Option Constraint

Cloud storage requires router

[« Back to List: Products](#)[Edit Layout](#)

Option Constraint Detail

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

Constraint Name Cloud storage requires router

Active

Constrained Option PO-000090

Configured SKU IT Professional Pack

Constraining Option PO-000084

Type Dependency

Check Prior Purchases

Option Constraint Group Cloud

Created By Admin User, 6/12/2017 11:50 AM

Last Modified By Admin User, 6/12/2017 11:50 AM

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

Option Constraint

Cloud storage requires access point

[Edit Lay](#)[« Back to List: Products](#)

Option Constraint Detail

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

Constraint Name Cloud storage requires access point

Active

Constrained Option PO-000090

Configured SKU IT Professional Pack

Constraining Option PO-000085

Type Dependency

Check Prior Purchases

Option Constraint Group Cloud

Created By Admin User, 6/12/2017 11:50 AM

Last Modified By Admin User, 6/12/2017 11:50 AM

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

Configuration Attributes

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

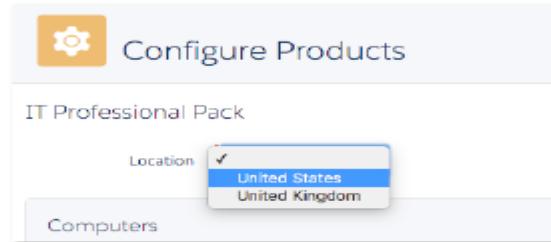
A: Create a configuration attribute!

Benefits:

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

Config Attribute Use Case

Allow the salesperson to specify a location, such as United States or United Kingdom



Later this attribute will drive business logic

Three Stages to set it up (Configuration Attribute)

1. Create a new “Configuration Attribute” under IT Pro Pack. Add it to picklist value on **Config Attribute**
2. Create a new field on **Product Option**
3. Create a picklist field on Quote line Object with the same name (**TWIN FIELDS**). This gets saved to Quote Line Items (for the bundled product)

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. <i>See 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.
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).

EX9: Create Config Attribute

1. Navigate to the ITPROPACK product
2. Click New Configuration Attribute in the Configuration Attributes related list

Option Constraints		New Option Constraint		Option Constraints Help ?	
Action	Constraint Name	Type	Constrained Option	Constraining Option	
Edit Del	WiFi Installation requires WiFi Router	Dependency	PO-000019	PO-000017	
Edit Del	WiFi Access Point require WiFi Router	Dependency	PO-000018	PO-000017	
Edit Del	Only one warranty may be selected	Exclusion	PO-000020	PO-000021	

Configuration Attributes		New Configuration Attribute	Configuration Attributes Help ?	
No records to display				

3. In a **new tab**, navigate to Setup | Create | Objects | Product Option
4. Click New in Custom Fields & Relationships

Custom Fields & Relationships		New	Field Dependencies	Custom Fields & Relationships Help ?				
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Modified Date
Edit	 Apply Immediately	SBQQ__AppliedImmediately__c	Salesforce CPQ	Checkbox			Satyanarayana Pusuluri	6/13/2018 4:27 AM

EX9: Create Config Attribute

5. Choose Picklist then click Next

The screenshot shows a configuration interface for creating a new attribute. On the left, there is a list of field types with their descriptions. The 'Picklist' option is selected and highlighted with a red border. At the bottom right of the screen are 'Next' and 'Cancel' buttons.

<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input checked="" type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) <small>1</small>	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next **Cancel**

6. Enter Location as the Field Label and choose to enter values

7. Add Picklist values, then click Next

The screenshot shows the configuration for the 'Field Label' and 'Values' sections. The 'Field Label' is set to 'Location'. The 'Values' section has two options: 'Use global picklist definition' (unchecked) and 'Enter values for the picklist, with each value separated by a new line.' (checked). Below this, a text area contains the values 'United States' and 'United Kingdom', which are also highlighted with a red box.

Field Label: Location 1

Values:

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

United States
United Kingdom

EX9: Create Config Attribute

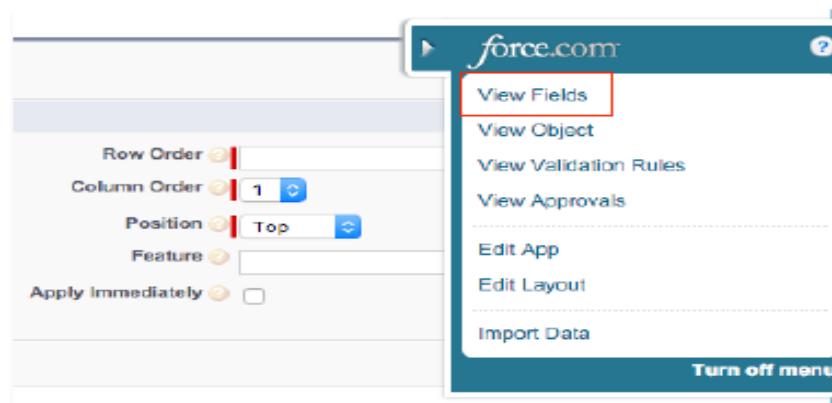
8. Click Next, Next, Save

9. Highlight and copy the location API Name

Edit Del	<u>FeatureExternalId</u>	FeatureExternalId__c	Formula (Text)	Pusuluri, 6/21/2018 2:55 AM
Edit Del Replace	<u>Location</u>	Location__c	Picklist	Satyanarayana Pusuluri, 6/23/2018 6:40 PM

11. Open the Force.com Quick Access Menu

12. Click View Fields



EX9: Create Config Attribute

13. Click the Target Field link

The screenshot shows a list of configuration attributes. The third item in the list is highlighted with a red box around the 'Target Field' link in the 'Actions' column. The list includes:

Action	Label	Type	Default Value	Modified By	Modified Date
Edit	SBOO__DisplayOrder__c	SteelBrick CPQ Number(3, 0)		Brian Cloutier	1/15/2016 8:35 AM
Edit	SBQQ__ShownValues__c	SteelBrick CPQ Long Text Area(5000)		Brian Cloutier	1/15/2016 8:35 AM
Edit Replace	Target Field	SteelBrick CPQ Picklist		Brian Cloutier	1/15/2016 8:35 AM

Related Lookup Filters
No related lookup filters defined.

14. Click New in Picklist Values

The screenshot shows the 'Picklist Values' page. The 'New' button in the top navigation bar is highlighted with a red box. The page displays a single row of values:

Action	Values	Default	Modified By	Modified Date	
Edit Del	Unit Price	<input type="checkbox"/>	Assigned dynamically	Brian Cloutier	1/15/2016 8:35 AM

15. Enter API name of new Product Option Field, then Save

The screenshot shows the 'New' page for a picklist value. The 'Values' field contains the text 'Location__c', which is highlighted with a red box.

16. Return to the original Config Attribute tab

EX9: Create Config Attribute

17. Refresh the original Config Attribute tab

18. Set field values, then Save

Information

= Required Information

Attribute Name	Location	Row Order	10
Product	IT Professional Pack	Column Order	1
Target Field	Location_c	Position	Top
Required	<input checked="" type="checkbox"/>	Feature	
Auto-Select	<input type="checkbox"/>	Apply Immediately	<input checked="" type="checkbox"/>

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

20. Click New in Custom Fields & Relationships

Standard Fields							Standard Fields Help	
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History		
	Created By	CreatedBy	Lookup(User)					
	Last Modified By	LastModifiedBy	Lookup(User)					
	Line Name	Name	Auto Number		<input checked="" 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 Disc.	SBQQ__AdditionalDiscount__c	SteelBrick CPQ	Formula (Currency)		Brian Clouter	1/15/2016 8:35 AM	

EX9: Create Config Attribute

21. Choose Picklist then click Next

The screenshot shows a list of field types with their descriptions:

- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define. (This option is highlighted with a red box.)
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted) [i]: Allows users to enter any combination of letters and numbers and store them in encrypted form.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

22. Enter Location as the Field Label and choose to enter values

23. Add Picklist values, then click Next, Next, Next, Save

Field Label: Location [1]

Values

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

United States
United Kingdom

Product Rules

Product Rules

Q: What if you want to verify that the data a user selects meets certain standards?

A: You need product rules!

Benefits:

- Contains a condition to be met, an error message and a filter
- They can be used for validation and selections
- Can use Advanced Condition Logic
- Can use **Summary Variables** to see if conditions are met
- Scope determines if rule applies to a specific configuration, or the quote as a whole

Summary Variables Defined

Aggregations of products on quotes for use in features like product rules, price rules, validation rules, and dynamic quote terms. They are similar to roll-up summary fields, only you do not have to store their values in a field.

For example, sum how many printers are sold, regardless of model.

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 Editor• Product: 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.
Type	<ul style="list-style-type: none">• Validation: Notifies the user of the invalid product selection ad 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

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 of 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

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

Product Rule Use Case

Location	United States			
Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> <input 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

Product Rule Use Cases

1. Only show US keyboards and paper options when Location is United States
2. Only show UK keyboards and paper options when Location is United Kingdom
3. Force toner quantity to be greater than or equal to the number of printers sold

Condition Met -

- i. All – All conditions are true (Only one condition in our use case)—Is location == US
- ii. Any – Any one is true
- iii. Custom – (1 And 2) Or 3

Scope

- i. Product – Applicable for the product only (bundle)—In this case prod makes sense for bundle
- ii. Quote – Works on Quote (independent of Bundle) – Directly added to quote – Case 3

Evaluation Event

- i. Always – Runs always – anytime a system validation occurs. Immediate feedback
- ii. Load/Edit/ Save- As per meaning

Type

- i. Selection – Affect which options are selectable. Use case 1 & 2. Works after selection.
- ii. Validation – shows validation error on top. Message used for validation
- iii. Alerts – Shows a message but can be ignored
- iv. Filter – For Dynamic bundle (Advanced Topic)

We will work from bottom to top

• Configuration Rules- Which product / bundles are subject to this rule when it runs-Select IT Professional Pack

Error Condition – The condition when the Rule should run (When Configurable Attribute Location is US)

Select Configurable Attributes in Target Object

Add the values Location__c to “tested field” picklist

Open the controlling field and Include this for “Configuration Attributes” picklist

We are asking the system to look at Location__c and do something

Actions – Action to be performed when the rule runs (Which options are available for selection)

Create 4 different Actions -2 to reveal/display US options paper and keyboard (in case they were hidden by a previous selection) and 2 to hide the UK options

EX10: Create Product Rule 1

1. Navigate to Product Rule tab

2. Click New

The screenshot shows the 'Product Rules' tab selected in the top navigation bar. A 'Create New...' button is highlighted with a red box. On the left, a 'Recent Items' sidebar lists items like 'First Big Sale', 'Q-00000', 'Bluth Company', 'Michael Bluth', 'Standard Price Book', and 'Standard'. The main area displays a 'Recent Product Rules' section with a 'New' button also highlighted with a red box. Below it, a message says 'No recent records. Click Go or select a view from the dropdown to display records.'

3. Set field values, then Save

The screenshot shows the 'Information' tab of a product rule creation form. Several fields are highlighted with red boxes:

- Product Rule Name:** Only show US related products if Location is United States
- Conditions Met:** All
- Scope:** Product
- Evaluation Event:** Always
- Type:** Selection
- Active:** checked
- Message:** (empty text area)

A legend at the top right indicates that a red border around a field means it is required information.

EX10: Create Product Rule 1

4. Click New Configuration Rule in Configuration Rules

The screenshot shows the 'Configuration Rules' screen with three main sections:

- Actions:** Shows 'No records to display'.
- Error Conditions:** Shows 'No records to display'.
- Configuration Rules:** Shows 'No records to display'. The 'New Configuration Rule' button is highlighted with a red box.

5. Set field values, then Save

The 'Information' tab for creating a new configuration rule has the following fields:

- Active:**
- Product:** IT Professional Pack
- Product Rule:** Only show US related pr...
- Product Feature:** (empty)

6. Navigate back to the Product Rule

The Product Rule details page shows the following information:

- Product Rule:** Only show US related products if Location is United States
- Created By:** Brian Cloutier, 1/15/2016 1:06 PM
- Last Modified By:** Brian Cloutier, 1/15/2016 1:06 PM

EX10: Create Product Rule 1

7. Click New Error Condition in Error Conditions

The screenshot shows a Salesforce page with three main sections: Actions, Error Conditions, and Configuration Rules. The Error Conditions section is highlighted with a red box around the 'New Error Condition' button. The Configuration Rules section shows a single record with the rule number CR-000000.

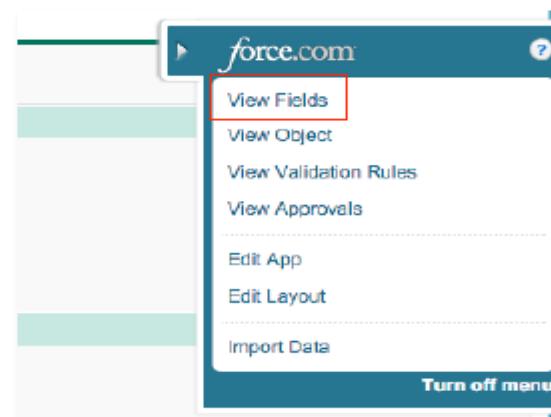
Actions		New Product Action	Actions Help
No records to display			

Error Conditions		New Error Condition	Error Conditions Help
No records to display			

Configuration Rules		New Configuration Rule	Configuration Rules Help
Action	Rule #		
Edit	Del	CR-000000	

8. Open the Force.com Quick Access Menu

9. Click View Fields



EX10: Create Product Rule 1

10. Click the Tested Field link

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

11. Click New in Picklist Values

Picklist Values		New	Reorder	Replace	Printable View	Chart Colors	Picklist Values Help
Action	Values	Default	Chart Colors	Modified By			
Edit Del	Group Line Items		Assigned dynamically	Brian Cloutier, 1/15/2016 8:35 AM			

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

EX10: Create Product Rule 1

13. Click the Change link next to Tested Object

API Name	SBQQ__TestedField__c	Created By	Brian Cloutier, 1/15/2016 8:35 AM	Modified By	Brian Cloutier, 1/15/2016 8:35 AM
Description	Field on the Quote object that should be used in testing this condition.				
Help Text	Field on the Quote object that should be used in testing this condition.				
Package Information					
Installed Package	SteelBrick CPQ	Available in Versions	24.0 - Current		
Picklist Options					
Controlling Field	Tested Object	[Change]			
Field Dependencies					
New		Field Dependencies Help (?)			
No dependencies defined.					

14. Double-click the Product Option API name under the Configurable Attribute column, then Save

Showing Columns: 1 - 5 (of 5) < Previous Next > View All Go to					
Click button to include or exclude selected values from the dependent picklist:					
<input type="button" value="Include Values"/> <input type="button" value="Exclude Values"/>					
Tested Object:	Quote	Quote Line	Product Option	Configuration Attributes	Upgraded Asset
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
	Location_c	Location_c	Location_c	Location_c	Location_c

15. Click OK if a warning popup appears

EX10: Create Product Rule 1

16. Return to the original Error Condition tab and refresh the page

17. Set field values, then Save

Information

Rule Only show US related pr

Tested Object Configuration Attributes

Tested Field Location__c

Tested Variable

Filter Information

Operator equals

Filter Type Value

Filter Value United States

Filter Variable

18. Navigate back to the Product Rule

19. Click New Product Action in Actions

Actions

New Product Action

No records to display

Error Conditions

Action	Condition #	Tested Variable	Operator	Filter Type	Filter Variable	Filter Value
Edit Del	000000		equals	Value		United States

EX10: Create Product Rule 1

20. Set field values, then click Save & New

Information

Rule Only show US related products

Type Show

Product Apple US Keyboard

Required

= Required Information



21. Set field values, then click Save & New

Information

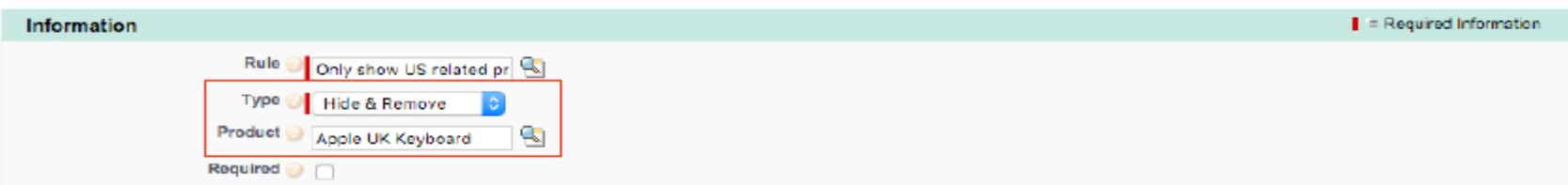
Rule Only show US related products

Type Hide & Remove

Product Apple UK Keyboard

Required

= Required Information



22. Set field values, then click Save & New

Information

Rule Only show US related products

Type Show

Product LaserJet Paper Letter

Required

= Required Information



23. Set field values, then Save

Information

Rule Only show US related products

Type Hide & Remove

Product LaserJet Paper A4

Required

= Required Information



Actions [4] | Error Conditions [1] | Lookup Queries (Product Rule) [0] | Configuration Rules [1]

Product Rule Detail

Edit Delete Clone Clone with Related

Product Rule Name US Products

Conditions Met All

Advanced Condition

Scope Product

Evaluation Event Always

Type Selection

Active ✓

Message

Evaluation Order 10

Lookup Query Information

Lookup Object

Lookup Type Field

Lookup Product Field

Lookup Required Field

Lookup Message Field

Created By Admin User, 6/12/2017 2:05 PM

Last Modified By Admin User, 6/12/2017 2:05 PM

Edit Delete Clone Clone with Related

Actions

New Product Action

Actions Help

Action	Product Action #	Type	Product	Required	Filter Field	Operator	Filter Value	Value Object	Value Field
Edit Del	PA-0000000	Show	Apple US Keyboard	<input type="checkbox"/>					
Edit Del	PA-0000001	Show	LaserJet Paper Letter	<input type="checkbox"/>					
Edit Del	PA-0000002	Hide & Remove	LaserJet Paper A4	<input type="checkbox"/>					
Edit Del	PA-0000003	Hide & Remove	Apple UK Keyboard	<input type="checkbox"/>					

Error Conditions

New Error Condition

Error Conditions Help

Action	Condition #	Tested Variable	Operator	Filter Type	Filter Variable	Filter Value
Edit Del	000000		equals	Value		United States

Lookup Queries (Product Rule)

New Lookup Query

Lookup Queries (Product Rule) Help

EX11: Create Product Rule 2

1. Repeat all steps (except 8-16) from previous exercise, with UK and US products reversed

Click Clone with Related

Product Rule Detail

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

Product Rule Preview

Error Condition (1)	Clone	Cancel
Product Action (4)		
Configuration Rule (1)		

Product Rule Detail

Product Rule Name	Only show UK related products when Location is United Kingdom	Type	Selection
Conditions Met	All	Active	<input checked="" type="checkbox"/>
Advanced Condition		Message	
Scope	Product	Evaluation Order	
Evaluation Event	Always		

EX9: US Items Product Rule

Location	United States			
Computers				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> <input type="button" value=""/>	1.00	AP-MBPRO	Apple MacBook Pro	15" Apple MacBook Pro (2016)
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

Toner Quantity Product Rule

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

The screenshot shows the Oracle Product Rules Home interface. A red box highlights the 'New' button in the top right corner of the 'Recent Product Rules' section. The 'Information' section contains several fields highlighted with red boxes: 'Product Rule Name' (Toner quantity must be greater than or equal to printer quantity), 'Conditions Met' (All), 'Scope' (Product), and 'Evaluation Event' (Save). Another red box highlights the 'Validation' type and the message 'Toner quantity must be greater than or equal to printer quantity!' under the 'Type' and 'Message' sections. The 'Actions' section shows 'No records to display'. The 'Configuration Rules' section has a red box around the 'New Configuration Rule' button.

Product Rules Home

Help for this Page ?

View: All Go! Edit | Create New View

Recent Product Rules **New** Recently Viewed

Product Rule Name
Setting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT

Information |= Required Information

Product Rule Name: Toner quantity must be greater than or equal to printer quantity

Conditions Met: All

Advanced Condition:

Scope: Product

Evaluation Event: Save

Type: Validation

Active:

Message: Toner quantity must be greater than or equal to printer quantity!

Evaluation Order:

Actions

No records to display

Error Conditions

No records to display

Lookup Queries (Product Rule)

No records to display

Configuration Rules

New Configuration Rule

Information

■ = Required Information

Active <input checked="" type="checkbox"/>
Product <input type="text"/> IT Professional Pack <input type="button"/> <input type="button"/> <input type="button"/>
Product Rule <input type="text"/> Toner quantity must be <input type="button"/> <input type="button"/>
Product Feature <input type="text"/> <input type="button"/> <input type="button"/> <input type="button"/>

In a new tab, navigate to Summary Variables

Summary Variables Home Help for this Page ?

View: All Go! Edit | Create New View

Recent Summary Variables Recently Viewed

No recent records. Click Go or select a view from the dropdown to display records.

Information ■ = Required Information

Variable Name <input type="text"/> Total quantity of LJ-TONER	Aggregate Function <input type="text"/> Sum <input type="button"/>
Target Object <input type="text"/> Product Option <input type="button"/>	Aggregate Field <input type="text"/> Quantity <input type="button"/>

Filter Information

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

Composite Information

Composite Operator <input type="text"/> --None-- <input type="button"/>	Variable Element <input type="text"/> <input type="button"/>
	Value Element <input type="text"/> <input type="button"/>

Information ■ = Required Information

Variable Name <input type="text"/> Total quantity of LJ-PRINTER	Aggregate Function <input type="text"/> Sum <input type="button"/>
Target Object <input type="text"/> Product Option <input type="button"/>	Aggregate Field <input type="text"/> Quantity <input type="button"/>

Filter Information

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

Composite Information

Composite Operator <input type="text"/> --None-- <input type="button"/>	Variable Element <input type="text"/> <input type="button"/>
	Value Element <input type="text"/> <input type="button"/>

Summary Variables Defined

Aggregations of products on quotes for use in features like product rules, price rules, validation rules, and dynamic quote terms. They are similar to roll-up summary fields, only you do not have to store their values in a field.

For example, sum how many printers are sold, regardless of model.

Toner Quantity Product Rule

Implementation Process Overview

Create Summary Variables

Information ! = Required Information

Variable Name <input type="text" value="Total quantity of LJ-TONER"/>	Aggregate Function <input type="button" value="Sum"/>
Target Object <input type="button" value="Product Option"/>	Aggregate Field <input type="button" value="Quantity"/>

Filter Information

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

Composite Information

Composite Operator <input type="button" value="--None--"/>	Variable Element <input type="text"/>
	Value Element <input type="text"/>

Navigate back to the incomplete Product Rule tab

Actions [New Product Action](#) Actions Help ?

No records to display

Error Conditions [New Error Condition](#) Error Conditions Help ?

No records to display

Lookup Queries (Product Rule) [New Lookup Query](#) Lookup Queries (Product Rule) Help ?

No records to display

Configuration Rules [New Configuration Rule](#) Configuration Rules Help ?

Action	Rule #	Active	Product	Product Feature
Edit Del	CR-000001	✓	IT Professional Pack	

Error Condition Edit

Save Save & New Cancel

Information

Rule ⓘ Toner quantity must be greater than or equal to printer quantity
Tested Object ⓘ --None--
Tested Field ⓘ --None-- ⓘ
Tested Attribute ⓘ ⓘ ⓘ
Tested Variable ⓘ Total quantity of LJ-Ton ⓘ

Filter Information

Operator ⓘ less than
Filter Type ⓘ Variable
Filter Value ⓘ
Filter Variable ⓘ Total quantity of LJ-Print ⓘ

Save Save & New Cancel

Q-00000 Configure Products

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

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 3.00	LJ-PRINTER	LaserJet Printer		\$275.00
<input checked="" type="checkbox"/> 2.00	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

Keeping with the printer theme, our company would like selection of the LJ-PRINTER to auto select the LJ-TONER and LJ-MAINTKIT.

Product Rules Home Help for this Page ?

View: All Go! Edit | Create New View

Recent Product Rules **New** Recently Viewed

Product Rule Name
Setting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT

Information = Required Information

Product Rule Name: Setting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT	Type: Selection
Conditions Met: All	Active: <input checked="" type="checkbox"/>
Advanced Condition:	Message:
Scope: Product	Evaluation Order:
Evaluation Event: Always	

Information = Required Information

Active: <input checked="" type="checkbox"/>
Product: IT Professional Pack
Product Rule: Selecting LJ-PRINTER au
Product Feature:

Click New Error Condition in Error Conditions

Actions Actions Help ?

No records to display

Error Conditions Error Conditions Help ?

No records to display

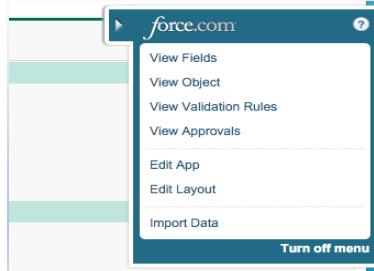
Lookup Queries (Product Rule) Lookup Queries (Product Rule) Help ?

No records to display

Configuration Rules Configuration Rules Help ?

Action	Rule #	Active	Product	Product Feature
Edit Del	CR-000000	<input checked="" type="checkbox"/>	IT Professional Pack	

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



Click the Tested Field link

Edit	 Tested Attribute	SBQQ__TestedAttribute__c	Salesforce CPQ	Lookup(Attribute Item)	<input checked="" type="checkbox"/>	Tested Field	Satyanarayana Pusuluri, 6/13/2018 4:28 AM
Edit Replace	 Tested Field	SBQQ__TestedField__c	Salesforce CPQ	Picklist		Tested Object	Satyanarayana Pusuluri, 6/13/2018 4:28 AM
Edit Replace	 Tested Object	SBQQ__TestedObject__c	Salesforce CPQ	Picklist			Satyanarayana Pusuluri, 6/13/2018 4:27 AM

Click New in Values and Enter API name of new Quote Line Field, then Save

Click the Change link next to Tested Object

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Tested Field	Object Name	Tested Field
Field Name	TestedField	Data Type	Picklist
Namespace Prefix	SBQQ		
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	Satyanarayana Pusuluri, 6/13/2018 4:27 AM	Modified By	Satyanarayana Pusuluri, 6/13/2018 4:28 AM

Package Information

Installed Package	Salesforce CPQ	Available in Versions	214.4 - Current
-------------------	----------------	-----------------------	-----------------

General Options

Required	<input type="checkbox"/>
Default Value	<input type="text"/>

Picklist Options

Restrict picklist to the values defined in the value set	<input type="checkbox"/>
Controlling Field	Tested Object [Change]

Satyanarayana Pusuluri

Double-click the Product Option API name under the Product Option column, then Save

Click button to include or exclude selected values from the dependent picklist:

[Include Values](#) [Exclude Values](#)

Tested Object:	Quote	Quote Line	Quote Line Group	Product Option	Configuration Attributes
Tested Field:	Group Line Items				
	Unit Price				
	SBQQ_ProductCode_c	SBQQ_ProductCode_c	SBQQ_ProductCode_c	SBQQ_ProductCode_c	SBQQ_ProductCode_c

Showing Columns: 1 - 5 (of 6) < Previous | Next > [View All](#) ▶ [Go to](#)

Click OK if a warning popup appears

Navigate back to the Error Condition and refresh the page

Information = Required Information

Rule	Setting LJ-PRINTER auto	
Tested Object	Product Option	
Tested Field	SBQQ_ProductCode_c	
Tested Attribute		
Tested Variable		

Filter Information

Operator	equals	
Filter Type	Value	
Filter Value	LJ-PRINTER	
Filter Variable		

Navigate back to the Product Rule

Actions New Product Action Actions Help

No records to display

Error Conditions New Error Condition Error Conditions Help

Action	Condition #	Tested Variable	Operator	Filter Type	Filter Variable	Filter Value
Edit Del	<u>000000</u>		equals	Value		LJ-PRINTER

Information

= Required Information

Rule Selecting LJ-PRINTER a

Type Add

Product LaserJet Toner Cartridge

Required

Information

= Required Information

Rule Selecting LJ-PRINTER a

Type Add

Product LaserJet Maintenance K

Required

Navigate back to the ITPROPACK
Select the LJ-PRINTER Product Option

Edit Del	<u>PO-000083</u>	40 <u>Apple Thunderbolt Display</u>	<u>Peripherals</u>	Related Product	No
Edit Del	<u>PO-000084</u>	10 <u>LaserJet Printer</u>	<u>Printing</u>	Accessory	No
Edit Del	<u>PO-000085</u>	20 <u>LaserJet Toner Cartridge</u>	<u>Printing</u>	Accessory	No

Check the Apply Immediately checkbox, then Save

Quote Line Visibility

Percent of Total Scope

Discounted By Package

Uplifted By Package

Apply Immediately

Apply Immediately Context

EX13: Dynamic Bundles Use Case

Within the IT Pro Pack, it is necessary to add another feature which would include Cables and Dongles. Unfortunately, there are many, many options offered within this particular feature. The user experience would be made far more cumbersome by including this long list of options within the configuration of the IT Pro Pack. During configuration, it would be far more agreeable to be taken to a separate product selection screen which presented only the options for this feature. In an effort to maintain an agreeable user experience, after selection of said options, returning to configuration would only have visible the options selected.

Dynamic Bundle Use Case

The image shows a software interface for configuring products. On the left, a configuration screen displays two items: 'CLOUDSTORAGE' (Cloud Storage 1GB) and 'ADMINHOUR' (Admin Hour). Below these are sections for 'Cables & Power Adapters' and 'Add Options'. On the right, a separate window titled 'Configure Products' shows a list of 'Cables & Power Adapters' with columns for 'PRODUCT CODE' and 'PRODUCT NAME'. The list includes: LAPTOPCART (Laptop Charging Cart), MAG245W (MagSafe 2 45W Power), MAG260W (MagSafe 2 60W Power), MAG285W (MagSafe 2 85W Power), MDPTODVI (Mini DisplayPort to DVI Adapter), and MDPTOVGA (Mini DisplayPort to VGA Adapter).

PRODUCT CODE	PRODUCT NAME
LAPTOPCART	Laptop Charging Cart
MAG245W	MagSafe 2 45W Power
MAG260W	MagSafe 2 60W Power
MAG285W	MagSafe 2 85W Power
MDPTODVI	Mini DisplayPort to DVI Adapter
MDPTOVGA	Mini DisplayPort to VGA Adapter

Dynamic Bundles

Implementation Process Overview

Create Feature

- Makes Cables & Power Adapters feature in the ITPROPACK bundle

Create Product and Product Option formula fields

- Makes Product_Family_Filter__c 'mirror' fields for Family values

Create Product Rule and add Configuration Rule

- Begins rule that applies to the Cables feature in ITPROPACK

Create Action

- Shows only options if Product_Family_Filter__c = Miscellaneous

Dynamic Bundles

Implementation Process Overview

Create Feature

Information

Feature Name: Cables & Power Adapters	Number: 60
Min Options: 0	Configured SKU: IT Professional Pack
Max Options:	Option Selection Method: Dynamic
Category: None	Dynamic Option Filter Field Set: None
Discount Schedule:	Dynamic Option Lookup Field Set: None

Dynamic Bundles

Implementation Process Overview

Create Product and Product Option formula fields

Example: Full Name = LastName & " " & FirstName | More Examples...
Simple Formula Advanced Formula

Insert Field Insert Operator Functions

Product Family Filter (Text) = TEXT(FAMILY)

Functions: ABS, AND, BEGINS

Example: Full Name = LastName & " " & FirstName | More Examples...
Simple Formula Advanced Formula

Insert Field Insert Operator Functions

Product Family Filter (Text) = "Something"

Functions: ABS, AND, BEGINS

Create two formula fields. One on Product which copies the value of Product Family to it

The other on Product Option, with the same API Name. Though we have written “Something” here, but when the rule queries this field, it actually goes and queries from Products formula

Dynamic Bundles

Implementation Process Overview

Create Product Rule and add Configuration Rule

Information

Product Rule Name: Filter to show only Miscellaneous Products	Type: Filter
Conditions Met: All	Active: <input checked="" type="checkbox"/>
Scope: Product	Message:
Evaluation Event: Always	

Dynamic Bundles

Implementation Process Overview

Create Product Rule and add Configuration Rule

Information

Active: <input checked="" type="checkbox"/>	Product: IT Professional Pack
Product Rule: Filter to show only Miscellaneous Products	Product Feature: Cables & Power Adapters

Dynamic Bundles

Implementation Process Overview

Create Action

Update some Product(s) product family field values as “Miscellaneous”



EX13: Dynamic Bundles

Create a feature that presents the user with only Miscellaneous products when Add Options is clicked

<input type="checkbox"/>	1.00	CLOUDSTORAGE	Cloud Storage 1GB
<input type="checkbox"/>	20.00	ADMINHOUR	Admin Hour
Cables & Power Adapters			
Add Options			

Q-00000 Configure Products

Cables & Power Adapters

PRODUCT CODE	PRODUCT NAME
LAPTOPCART	Laptop Charging Cart
MAG245W	MagSafe 2 45W Power
MAG260W	MagSafe 2 60W Power
MAG285W	MagSafe 2 85W Power
MDPTODVI	Mini DisplayPort to DVI Adapter
MDPTOVGA	Mini DisplayPort to VGA Adapter

salesforce

Custom Actions

Hardware Products Custom Action

Implementation Process Overview

Create Custom Action

- Makes new Add Hardware button available for product selection

Create first two Search Filters

- Makes Product Name and Code filters part of button's functionality

Create third Search Filter

- Creates a hidden filter to drive visibility of only Hardware products

EX14: Hardware Products Custom Action

The customer would like a way to only display their Hardware products during product selection.

Hardware Products Custom Action Use Case

The screenshot shows the Oracle Sales Cloud interface. At the top, there's a navigation bar with a shopping cart icon, the quote number Q-00009, and the title "Quote Line Editor". Below the navigation bar is a toolbar with buttons for "Add Hardware", "Add Products", "Save", "Quick Save", "Cancel", "Calculate", "Delete Lines", and "Add Group". The main area is titled "Product Selection" and displays a grid of 24 products found. The columns include PRODUCT CODE, PRODUCT NAME, PRODUCT FAMILY, PRODUCT DESCRIPTION, LIST PRICE, and a checkbox column. The first few rows show products like "AP-MAGICMOUSE" (Apple Magic Mouse), "AP-MB" (Apple MacBook), and "AP-MBAIR" (Apple MacBook Air). To the right of the grid is a "Filter" section with input fields for "Product Name" and "Product Code", and buttons for "Apply" and "Clear Fields".

Hardware Products Custom Action

Implementation Process Overview

Create Custom Action

The screenshot shows the "Create Custom Action" page. The "Information" tab is selected, displaying fields for "Name" (Add Hardware), "Display Order" (10), "Type" (Button), "Parent Custom Action" (empty), "Active" (checked), "Default" (unchecked), "URL Target" (None), and "URL" (empty). The "Layout" tab is also visible, showing "Page" (Quote Line Editor), "Location" (Quote/Group), "Action" (Add Products), "Icon" (None), "Label" (Add Hardware), and "Description" (empty). A red box highlights the "Name" field and the "Page" dropdown in the Layout section.

Hardware Products Custom Action

Implementation Process Overview

Create first two Search Filters

Information

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

= Required Information

Information

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

= Required Information

Hardware Products Custom Action

Implementation Process Overview

Create third Search Filter

Information

Filter Name: Product Family	Display Order: 30
Target Object: Product	Filter Value: Hardware
Target Field: Product Family	Hidden: <input checked="" type="checkbox"/>
Operator: equals	Action: Add Hardware 

= Required Information

These are OOB buttons that come along with the package. To change anything, clone it and then do the changes to the cloned one

Action	Active	Display Order	Name	Type	Label	Parent Custom Action	Location
Edit Del		908	Reset Discounts - Quote	Button	Reset Discounts		Quote
Edit Del	✓	901	Add Favorites	Button	Add Favorites	Add Products	Quote/Group
Edit Del	✓	902	Upgrade Assets	Button	Upgrade Assets	Add Products	Quote/Group
Edit Del	✓	903	Renew Subscriptions	Button	Renew Subscriptions	Add Products	Quote/Group
Edit Del	✓	950	Clone Group	Button	Clone Group	Add Products	Group
Edit Del	✓	951	Delete Group	Button	Delete Group	Add Products	Group
Edit Del	✓	952	Optional: All - Group	Button	Optional: All	Add Products	Group
Edit Del	✓	953	Optional: None - Group	Button	Optional: None	Add Products	Group
Edit Del	✓	954	Reset Discounts - Group	Button	Reset Discounts	Add Products	Group
Edit Del	✓	900	Add Products	Menu	Add Products		Quote/Group
Edit Del	✓	904	Separator	Separator	Add Products		Quote
Edit Del	✓	905	Add Group	Menu	Add Group		Quote
Edit Del	✓	906	Ungroup	Button	Ungroup		Quote
Edit Del	✓	907	Delete Lines	Button	Delete Lines		Quote
Edit Del	✓	909	Optional: All - Quote	Button	Optional: All		Quote
Edit Del	✓	910	Optional: None - Quote	Button	Optional: None		Quote
Edit Del	✓	911	Separator	Separator	Add Products		Quote

Custom Action Add Products

[« Back to List: Custom Actions](#)

Sear

Type:

1. Menu
2. Button
3. Separator

Custom Action Detail

[Edit](#) [Delete](#) [Cl](#)

Name Add Products

Display Order 900

Type Menu



Parent Custom Action

Layout

Page Quote Line Editor

Location Quote/Group

Action Add Products

Created By Satyanarayana Pusuluri 12/20/2011 01:14 AM

[Edit](#) [Delete](#) [Cl](#)

On custom actions add two new picklist values to “Label”

Add Hardware
Add Products (Dynamic)

The screenshot shows a configuration interface for a custom action. At the top, there are buttons for 'Add Hardware' and 'Add Products (Dynamic)'. Below them is a section with three dropdown menus: 'Page' (set to 'Quote Line Editor'), 'Location' (set to '--None--'), and 'Action' (set to 'Quote Line Editor'). A 'Save' button is visible at the bottom right.

Page: What Page it should appear on

Location: Which Location it should be on

Action : What Action should it perform

Product Configurator – Bundle - Option page
Quote Line Editor – Quote Line Page

This screenshot shows the same configuration interface as the previous one, but with different dropdown menu options. The 'Action' dropdown now includes 'Quote', 'Quote/Group', 'Group', and 'Line' as additional choices. The 'Save' button is also present.

Quote – On top

Quote/Group – Where there are no groups then top else on the group

Group – on the group

Line – On line item

The screenshot shows the 'Custom Action Detail' page for a custom action named 'Add Hardware'. The 'Active' checkbox is checked. The 'Display Order' is set to 864. The 'Type' is 'Button'. There is a 'Parent Custom Action' field. The 'Layout' section shows the configuration for the 'Add Hardware' button: 'Page' is 'Quote Line Editor', 'Location' is 'Quote/Group', and 'Action' is 'Add Products'. Other fields shown include 'Icon', 'Label' (set to 'Add Hardware'), and 'Description'.

Create a new Custom action – Add hardware

Display Order – where should button appear (Before 900)

Add a 3 new search filter from RL

- This says that the user should be able to search products by name

Search Filter Edit
New Search Filter

Search Filter Edit

Information

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

Advanced Information

Filter Source Object	--None--	Hidden Source Object	--None--
Filter Source Field	--None--	Hidden Source Field	--None--

Search Filter Edit
New Search Filter

Search Filter Edit

Information

Filter Name	Product Code	Display Order	10
Target Object	Product	Filter Value	
Target Field	Product Code	Hidden	<input checked="" type="checkbox"/>
Operator	contains	Action	Add Hardware

Advanced Information

Filter Source Object	--None--	Hidden Source Object	--None--
Filter Source Field	--None--	Hidden Source Field	--None--

- Add one more for product family and hide it. Make sure the value is "Hardware" and Hidden is checked

- Add another filter for product code

Search Filter Edit

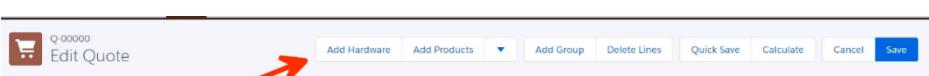
Search Filter Edit

Information

Filter Name	Product Family	Display Order	10
Target Object	Product	Filter Value	Hardware
Target Field	Product Family	Hidden	<input checked="" type="checkbox"/>
Operator	equals	Action	Add Hardware

Advanced Information

Filter Source Object	--None--	Hidden Source Object	--None--
Filter Source Field	--None--	Hidden Source Field	--None--



Q-00000
Edit Quote

Add Hardware Add Products Delete Lines Quick Save Calculate Cancel Save

salesforce CPQ Search Search

Admin User Setup Help Salesforce CPQ

Home Accounts Opportunities Quotes Products Product Rules Price Rules Summary Variables Discount Schedules Quote Templates Template Content Documents

Q-00000 Product Selection

Search Products Select Select & Add More Cancel

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	Product Filter
AP-MAGICMOUSE	Apple Magic Mouse	Hardware	12" Apple MacBook (2016)	Product Name: <input type="text"/> Product Code: <input type="text"/>
AP-MB	Apple MacBook	Hardware	13" Apple MacBook Air (2016)	
AP-MBAIR	Apple MacBook Air	Hardware	15" Apple MacBook Pro (2016)	
AP-MBPRO	Apple MacBook Pro	Hardware		
AP-TBDISPLAY	Apple Thunderbolt Display	Hardware		

Go to quote. Only hardware products appear and 2 search filters available

EX15: Dynamic Custom Actions Use Case

The company only sells bundles for any new business, and for all legacy business they only sell their standalone products. They would like a way to automate this behavior for their sales users when entering product selection.

Conditional Custom Action Use Case

The screenshot shows the Salesforce Quote Line Editor interface. At the top, there's a toolbar with buttons for Add Hardware, Add Products, Save, and Quick Save. Below the toolbar, a modal dialog titled "Product Selection" is displayed. This dialog lists various products with checkboxes next to them. The products listed are:

Product Code	Product Name	Category	Price
AP-MB	Apple MacBook	Hardware	\$225.00
AP-MBAIR	Apple MacBook Air	Hardware	\$375.00
AP-MBPRO	Apple MacBook Pro	Hardware	\$800.00
APPLIANCE	Appliance		\$1,100.00
ITCORPPACK	IT Corporate Pack	Service	\$0.00
ITEDUPACK	IT Education Pack	Service	\$0.00

The "APPLIANCE" and "ITCORPPACK" products are highlighted in blue, indicating they are selected. The "AP-MB", "AP-MBAIR", and "AP-MBPRO" products are not selected. The "ITEDUPACK" product is also not selected. The "Select" button at the bottom right of the dialog is highlighted in blue, suggesting it is the active or next step.

Conditional Custom Action

Implementation Process Overview

Create Custom Action

- Makes new Add Products button available for product selection

Create Product formula field

- Makes Is Bundle field to identify which products are bundles

Create Quote formula field

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

Create first three Search Filters

- Makes standard Product Name, Code, and Family filters



Create an action to find out bundled products

Conditional Custom Action

Implementation Process Overview

Create Custom Action

Information		<small> = Required Information</small>								
<table border="1"> <tr> <td>Name</td> <td>Add Products (Dynamic)</td> </tr> <tr> <td>Display Order</td> <td>20</td> </tr> <tr> <td>Type</td> <td>Button</td> </tr> <tr> <td>Parent Custom Action</td> <td><input type="text"/> </td> </tr> </table>			Name	Add Products (Dynamic)	Display Order	20	Type	Button	Parent Custom Action	<input type="text"/>
Name	Add Products (Dynamic)									
Display Order	20									
Type	Button									
Parent Custom Action	<input type="text"/>									
<table border="1"> <tr> <td>Active</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Default</td> <td><input type="checkbox"/></td> </tr> <tr> <td>URL Target</td> <td><input type="text"/> -None-</td> </tr> <tr> <td>URL</td> <td><input type="text"/> </td> </tr> </table>			Active	<input checked="" type="checkbox"/>	Default	<input type="checkbox"/>	URL Target	<input type="text"/> -None-	URL	<input type="text"/>
Active	<input checked="" type="checkbox"/>									
Default	<input type="checkbox"/>									
URL Target	<input type="text"/> -None-									
URL	<input type="text"/>									
Layout										
<table border="1"> <tr> <td>Page</td> <td>Quote Line Editor</td> </tr> <tr> <td>Location</td> <td>Quote/Group </td> </tr> <tr> <td>Action</td> <td>Add Products </td> </tr> </table>			Page	Quote Line Editor	Location	Quote/Group	Action	Add Products		
Page	Quote Line Editor									
Location	Quote/Group									
Action	Add Products									
<table border="1"> <tr> <td>Icon</td> <td><input type="text"/> -None-</td> </tr> <tr> <td>Label</td> <td>Add Products </td> </tr> <tr> <td>Description</td> <td><input type="text"/> </td> </tr> </table>			Icon	<input type="text"/> -None-	Label	Add Products	Description	<input type="text"/>		
Icon	<input type="text"/> -None-									
Label	Add Products									
Description	<input type="text"/>									

On Products, whenever Configuration Type is populated, set Is Bundle to true. Identify which products are Bundled

Conditional Custom Action

Implementation Process Overview

Create Product formula field

Example: `TODAY() > CloseDate` [More Examples...](#)

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

Select Field Type

Quote Custom Field Is Bundle

[Back to Quote](#)

Identify “New Quote”. Bottom 3 values specify repeated business. Only first one is new Business
Create a new formula on quote

▼ Salesforce CPQ Configuration	
Component	Configuration Type Allowed
	Configuration Event Always
Option Layout	Sections
Option Selection Method	Click

Quote Custom Field

Is Bundle

[Back to Quote](#)

Custom Field Definition Detail

[Edit](#)
[Set Field-Level](#)

Field Information

Field Label	Is Bundle
Field Name	Is_Bundle
API Name	Is_Bundle__c
Description	
Help Text	
Created By	<u>Satyanarayana Pusuluri</u> , 11/8/2018 6:13 AM

Formula Options

Data Type	Formula
	IF(TEXT(SBQQ__Type__c)="Quote",True,False)

Quote Detail

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

Quote Number Q-00000

Primary Status DraftExpires On 7/12/2017Sales Rep Admin UserPrimary Contact Subscription Term 12Delivery Method Master Contract

Approval Status

Submitted Date

Include Bundles Opportunity First SaleNet Amount \$0.00Customer Amount \$0.00Regular Amount \$0.00List Amount \$0.00Type QuotePayment Terms --None--Start Date End Date Quote Process Id Re-QuoteAccount Test AccountPrice Book Standard Price Book

Product Name IT Professional Pack

Product Code ITPROPACK

Product Family Filter Service

Is Bundle

Created By

Admin User, 6/12/2017 8:41 AM



If it is a new Business then include bundles

Quote Detail

[Edit](#) [Delete](#) [Clone](#) [Clone with Related](#) [Edit Lines](#) [Include Document](#) [Generate Document](#) [Preview Document](#) [Refresh Pi](#)
[Modify Quo Terms](#) [Preview Approval](#) [Submit for Approval](#) [Recall Approval](#)

Quote Number Q-00000

Primary Status DraftExpires On 7/12/2017Sales Rep Admin UserPrimary Contact Subscription Term 12Delivery Method Master Contract

Approval Status

Submitted Date

Include Bundles Opportunity First SaleNet Amount \$0.00Customer Amount \$0.00Regular Amount \$0.00List Amount \$0.00Type QuotePayment Terms Net 30Start Date 7/1/2017End Date Quote Process Id Account Test AccountPrice Book Standard Price BookContracting Method By Subscription End DateFirst Segment Term End Date 

Custom Action Detail

Name: Add Products (Dynamic)

Display Order: 20

Type: Button

Parent Custom Action:

Active:

Default:

Brand Button:

URL Target:

URL:

Layout

Page: Quote Line Editor

Location: Quote/Group

Action: Add Products

Created By: Admin User, 6/13/2017 9:54 AM

Last Modified By: Admin User, 6/13/2017 9:54 AM

Search Filters

Action	Filter Name	Display Order	Target Object	Target Field	Operator	Filter Value	Hidden
Edit Del	Product Name	10	Product	Name	contains	<input type="checkbox"/>	
Edit Del	Product Code	20	Product	Product Code	contains	<input type="checkbox"/>	
Edit Del	Product Family	30	Product	Product Family	equals	<input type="checkbox"/>	
Edit Del	Bundles	30	Product	Is_Bundle__c	equals	<input checked="" type="checkbox"/>	

Custom Action Conditions

No records to display

Last Filter:

Checks for match on Is-Bundle__c on prod and quotes.

On Quote it is checked only for Type = Quote (new business) and unchecked for all others.

If checked on Quote, it finds all products where is_bundle is checked

If unchecked on Quote, it finds all products where is_bundle is checked

What this does it, it checks the value of checkbox on Quote (Type = QUote). For checked it will filter only the products where the checkbox is checked which will pull up only the Bundled product (Is bundle checked)
For other quote type it will display the products where the checkbox isbundl is unchecked. Standalone products.

Search Filter Detail

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

Filter Name: Bundles
 Target Object: Product
 Target Field: Is_Bundle__c
 Operator: equals

Display Order: 30
 Filter Value:
 Hidden: ✓
 Action: Add Products (Dynamic)

Advanced Information

Filter Source Object: Quote
 Filter Source Field: Include_Bundles__c
 Created By: Admin User, 6/13/2017 9:57 AM

Hidden Source Object:
 Hidden Source Field:
 Last Modified By: Admin User, 6/13/2017 9:57 AM

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

Product Selection

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
ITPROPACK	IT Professional Pack	Service	12" Apple MacBook (2016)	\$0.00
AP-MB	Apple MacBook	Hardware	13" Apple MacBook Air (2016)	\$1,000.00
AP-MBAIR	Apple MacBook Air	Hardware	13" Apple MacBook Air (2016)	\$1,300.00



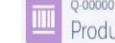
On Quote Object – Select type as “Quote” and you will see only bundled products on click on “Add Products (Dynamic)”

Product Selection

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
ADMINHOUR	Admin Hour	Support		\$75.00
AP-MAGICMOUSE	Apple Magic Mouse	Hardware		\$80.00
AP-REMOTEDSKTOP	Apple Remote Desktop	Software		\$80.00
AP-THERMAL	Annie Thunderbolt Dual	Hardware		\$1,000.00

Product Selection

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	Product Filter
ITPROPACK	IT Professional Pack	Service	12" Apple MacBook (2016)	Apply Clear Fields
AP-MB	Apple MacBook	Hardware	13" Apple MacBook Air (2016)	
AP-MBAIR	Apple MacBook Air	Hardware	13" Apple MacBook Air (2016)	
AP-MBPRO	Apple MacBook Pro	Hardware	15" Apple MacBook Pro (2016)	
ITCORPPACK	IT Corporate Pack	Service		



On Quote Object – Select type as “Renewal” and you will see only non-bundled products on click on “Add Products (Dynamic)”

Hide Search filter if Is_bundle checkbox on quote is checked

Search Filter Detail
[Edit](#) [Delete](#) [Clone](#)

Filter Name
 Target Object Product
 Target Field Name
 Operator contains

Display Order
 Filter Value
 Hidden
 Action Add Products (Dynamic)

Advanced Information

Filter Source Object
 Filter Source Field
 Created By Admin User, 6/13/2017 9:54 AM

Hidden Source Object Quote
 Hidden Source Field Include_Bundles__c

Last Modified By Admin User, 6/13/2017 10:37 AM

[Edit](#) [Delete](#) [Clone](#)
Quote Detail
[Edit](#)
[More](#)

Quote Number Q-00000
 Primary
 Status Draft
 Expires On 7/12/2017
 Sales Rep Admin User
 Primary Contact
 Subscription Term 12
 Delivery Method
 Master Contract
 Approval Status
 Submitted Date
 Include Bundles
 Sale Type Non-Hardware

efault – when checked, you will not see quote line editor, and it will directly do the action
 and Bundle – Coloring the buttons differently

 Custom Action Condition
Hardware
[« Back to List: Custom Object Definitions](#)
[Edit Layout](#)
Custom Action Condition Detail
[Edit](#) [Delete](#) [Clone](#)

Custom Action Condition Name Hardware
 Custom Action Add Hardware
 ParentConditionsActive

Target Object Quote
 Field Sale_Type__c
 Operator equals
 Filter Value Hardware

Hidden source field is set to true or false based on the check box.

Display this button (Add Hardware) only when Sale-type is Hardware

The screenshot shows the Salesforce Setup interface. At the top, there are buttons for Edit, Delete, and Clone. Below this is a section titled "Search Filters" with a "New Search Filter" button. A table lists search filters for Product Name, Product Code, and Product Family, all set to filter for "Hardware". Below this is a section titled "Custom Action Conditions" with a "New Custom Action Condition" button. A table lists custom action conditions for "Hardware", targeting "Quote" objects where "Sale_Type__c" equals "Hardware". A red arrow points to the "Filter Value" column for the "Hardware" condition.

Menus:

Add Products is a Menu, Add Favorites is a button associated upto Add Products

The screenshot shows the Salesforce Quotes page. At the top, there is a navigation bar with Home, Accounts, Opportunities, Quotes, Products, Product Rules, Price Rules, Summary Variables, Discount Schedules, Quote Templates, Template Content, and Documents. Below this is a toolbar with "Edit Quote" (with a shopping cart icon), "Add Products (Dynamic)" (highlighted with a red box), "Add Products" (dropdown menu), "Add Group", "Delete Lines", "Quick Save", "Calculate", "Cancel", and "Save". A "New Custom Action" button is also visible. The main area displays a list of custom actions. One row for "Add Favorites" is highlighted with a red box and has a red arrow pointing to it from the right. The "Type" column for this row shows "Button". The "Label" column shows "Add Favorites". The "Parent Custom Action" column shows "Add Products". The "Location" column shows "Quote/Group". Other rows in the list include "Add Products (Dynamic)", "Add Hardware", "Launch External", and "Upgrade Assets".

Guided Selling

EX17: Guided Selling Use Case

The company sells only a limited number of bundles for their new business, but they would like to provide the opportunity for the sales user to slenderize available bundles on the basis of some specific information. Ideally, the sales user would answer business relevant questions/prompts which would produce the ideal bundle solution for their sale during product selection.

Guided Selling Use Case

Guided Selling Use Case

① Guided Selling

What is the deployment method?
Mobile

Suggest

Q-00011
Product Selection
1 Products Found

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

① Guided Selling

What is the deployment method?
Onsite

What is the deployment setting?
Academic

Suggest

Q-00011
Product Selection
1 Products Found

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

Guided Selling Use Case

What is the deployment method?
Onsite

What is the deployment setting?
Commercial

Number of Users
1-100

Q-00011
Product Selection
3 Products Found

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

What is the deployment method?
Onsite

What is the deployment setting?
Commercial

Number of Users
501+

Q-00011
Product Selection
1 Products Found

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 Continued

Create Product Fields Conditions

- Makes fields that are displayed to client 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

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

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

Create 3 new picklist fields and 4 products

Action	Product Name	Deployment Type	Deployment Setting	Number of Users
Edit Deactivate	IT Corporate Pack	Onsite	Commercial	1-100; 101-500; 501+
Edit Deactivate	IT Education Pack	Onsite	Academic	
Edit Deactivate	IT MobilePack	Mobile		
Edit Deactivate	IT Professional Pack	Onsite	Commercial	1-100; 101-500
Edit Deactivate	IT Starter Pack	Onsite	Commercial	1-100

Guided Selling

Implementation Process Overview

Update Product fields

Product Detail		Actions		Status	
Product Name	IT Professional Pack	Edit	Delete	Clone	Clone With Related
Product Code	ITPROPACK			Active	<input checked="" type="checkbox"/>
Product Family Filter	Service			Product Family	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 Quote Process and Process Inputs

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

Create a new Quote process, with 3 process input records

Quote Process
IT Packs Guided Selling

Customize Page | Edit Layo

« Back to List: Products

Process Inputs [3] | Quote Line Groups [0]

Quote Process Detail

Process Name	IT Packs Guided Selling	Owner	<input checked="" type="checkbox"/> Admin User [Change]
Default	<input type="checkbox"/>	Product Configuration Initializer	<input type="checkbox"/>
Auto Select Product?	<input type="checkbox"/>	Product Search Executor	<input type="checkbox"/>
Guided Only	<input type="checkbox"/>	Sort Order	10
Created By	Admin User, 6/13/2017 10:50 AM	Last Modified By	Admin User, 6/13/2017 10:50 AM

Action **Input Name**

[Edit](#) [Del](#) Deployment Type

[Edit](#) [Del](#) Deployment Setting

[Edit](#) [Del](#) Number of Users

Process Inputs

New Process Input

Quote Line Groups

New Quote Line Group

No records to display

^ Back To Top

Always show me more records per related list

Satyanarayana Pusuluri

Create Process Input fields

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: Deployment Type i

Values:

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

Deployment Type

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 i

Field Name: Deployment_Type i

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: Deployment Setting i

Values:

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

Deployment Setting

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 i

Field Name: Deployment_Setting i

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: Number of Users i

Values:

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

Number of Users

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 i

Find the match on the products

Process Input
Deployment Type

Customize Page | Edit Lay

« Back to List: Products

Process Input Conditions [0] | Process Inputs Regulated [1]

Process Input Detail

Input Name	Deployment Type	Active	<input checked="" type="checkbox"/>
Label	What type of deployment?	Quote Process	IT Packs Guided Selling
Display Order	10	Input Field	Deployment_Type__c
Default Field		Conditions Met	All

Product Filter

Product Field	Deployment_Type__c	Operator	equals
Created By	Admin User, 6/13/2017 10:51 AM	Last Modified By	Admin User, 6/13/2017 10:51 AM

Process Input Conditions

New Process Input Condition

For the next question to appear, create a condition that - the values should be “Onsite”

Process Input
Deployment Setting

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

« Back to List: Products

Process Input Conditions [1] | Process Inputs Regulated [1]

Process Input Detail

Input Name	Deployment Setting	Active	<input checked="" type="checkbox"/>
Label	Deployment setting?	Quote Process	IT Packs Guided Selling
Display Order	20	Input Field	Deployment_Setting__c
Default Field		Conditions Met	All

Product Filter

Product Field	Deployment_Setting__c	Operator	equals
Created By	Admin User, 6/13/2017 10:51 AM	Last Modified By	Admin User, 6/13/2017 10:51 AM

Process Input Conditions

New Process Input Condition

Process Input Conditions Help

Action	Process Input Conditions Name	Master Process Input	Operator	Value
Edit Del	Onsite Packs	Deployment Type	equals	Onsite

Process Inputs Regulated

New Process Input Condition

Process Inputs Regulated Help

Action	Process Input Conditions Name	Process Input	Operator	Value
Edit Del	Commercial Packs	Number of Users	equals	Commercial

Satyanarayana Pusuluri

This means, another question depends on answer from this one. This gets filled in automatically

Process Input Deployment Setting

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

Process Input Conditions [1] | Process Inputs Regulated [1]

Process Input Detail

Input Name	Deployment Setting	Active	<input checked="" type="checkbox"/>
Label	Deployment setting?	Quote Process	<input type="checkbox"/> IT Packs Guided Selling
Display Order	20	Input Field	<input type="checkbox"/> Deployment_Setting__c
Default Field	<input type="checkbox"/>	Conditions Met	<input type="checkbox"/> All

Product Filter

Product Field	<input type="checkbox"/> Deployment_Setting__c	Operator	<input type="checkbox"/> equals
Created By	Admin User, 6/13/2017 10:51 AM	Last Modified By	Admin User, 6/13/2017 10:51 AM

Process Input Conditions

Action	Process Input Conditions Name	Master Process Input	Operator	Value
Edit Del	Onsite Packs	Deployment Type	equals	Onsite

Process Inputs Regulated

Action	Process Input Conditions Name	Process Input	Operator	Value
Edit Del	Commercial Packs	Number of Users	equals	Commercial

Previous and Next

Process Input Deployment Setting

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

Process Input Conditions [1] | Process Inputs Regulated [1]

Process Input Detail

Input Name	Deployment Setting	Active	<input checked="" type="checkbox"/>
Label	Deployment setting?	Quote Process	<input type="checkbox"/> IT Packs Guided Selling
Display Order	20	Input Field	<input type="checkbox"/> Deployment_Setting__c
Default Field	<input type="checkbox"/>	Conditions Met	<input type="checkbox"/> All

Product Filter

Product Field	<input type="checkbox"/> Deployment_Setting__c	Operator	<input type="checkbox"/> equals
Created By	Admin User, 6/13/2017 10:51 AM	Last Modified By	Admin User, 6/13/2017 10:51 AM

Process Input Conditions

Action	Process Input Conditions Name	Master Process Input	Operator	Value
Edit Del	Onsite Packs	Deployment Type	equals	Onsite

Process Inputs Regulated

Action	Process Input Conditions Name	Process Input	Operator	Value
Edit Del	Commercial Packs	Number of Users	equals	Commercial

Process Input Edit

[Save](#)[Save & New](#)[Cancel](#)

Information

Input Name	Number of Users
Label	Number of Users
Display Order	30
Default Field	--None--

Active	<input checked="" type="checkbox"/>
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
----------	----------

Process Input Condition Edit

[Save](#)[Save & New](#)[Cancel](#)

Information

Process Input Conditions Name	Commercial Packs
Process Input	Number of Users

Active	<input checked="" type="checkbox"/>
--------	-------------------------------------

Filter Information

Master Process Input	Deployment Setting
Operator	equals
Value	Commercial

EX17: Guided Selling

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

Test the Guided Selling process with a sample quote

Quote Detail

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

Quote Number Q-00001
Primary
Status Draft
Expires On 6/15/2016
Sales Rep Admin User
Primary Contact
Subscription Term 12
Delivery Method
Master Contract

Opportunity First Big Sale
Net Amount \$0.00
Customer Amount \$0.00
Regular Amount \$0.00
List Amount \$0.00
Type Quote
Payment Terms Net 30
Start Date 6/1/2016
Quote Process Id a0g360000001Wvae

Copy the ID and paste it onto the quote

The screenshot shows the Salesforce CPQ interface for a quote process. The URL in the browser is <https://na50.salesforce.com/a0k6A000000B0mO>. The page title is "IT Packs Guided Selling". The quote number is Q-00000. The quote detail section includes fields like Primary (checked), Status (Draft), Expires On (7/12/2017), Sales Rep (Admin User), Primary Contact, Subscription Term (12), Delivery Method, Master Contract, Approval Status, Submitted Date, Opportunity (First Sale), Net Amount (\$0.00), Customer Amount (\$0.00), Regular Amount (\$0.00), List Amount (\$0.00), Type (Quote), Payment Terms (Net 30), Start Date (7/1/2017), End Date, Quote Process Id (a0k6A000000B0mO), and Account (Test Account). A "Search" button is visible at the top right of the header.

Secure | https://na50.salesforce.com/a0k6A000000B0mO

Apps Salesforce Employee Central Login | Salesforce H&T Online T

salesforce CPQ Search... Search

Home Accounts Opportunities Quotes Products Product Rules

Quote Process
IT Packs Guided Selling

< Back to List: Products

Customize Page |

Quote Q-00000

< Back to List: Products

Approvals [] | Quote Lines [] | Process Input Values [] | Quote Line Groups [] | Quote Documents [] | Open Activities [] | Activity History [] | Additional Documents [] | Notes []

Quote Detail

Edit Delete Clone Clone with Related Edit Lines Include Document Generate Document Preview Document Refresh

Modify Quote Terms Preview Approval Submit for Approval Recall Approval

Quote Number	Q-00000	Opportunity	First Sale
Primary	✓	Net Amount	\$0.00
Status	Draft	Customer Amount	\$0.00
Expires On	7/12/2017	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	7/1/2017
Master Contract		End Date	
Approval Status		Quote Process Id	a0k6A000000B0mO
Submitted Date		Account	Test Account

On Edit lines it will not be automatically populated. You need to hit Add products to initiate it.
With Mobile , no other question. With Onsite you will get another question
Academic not questions, Commercial will take you to the next question.
You don't need to answer all questions. The results will be based on the point where you stop
To reopen, click on filter bar

The screenshot shows the Salesforce Product Selection screen. At the top, there's a navigation bar with tabs: Home, Accounts, Opportunities, Quotes (which is selected), Products, Product Rules, Price Rules, Summary Variables, Discount Schedules, Quote Templates, Template Content, and Documents. Below the navigation bar, the quote number Q-00000 is displayed, followed by the title "Product Selection". There's a search bar with the placeholder "Search Products" and a magnifying glass icon. To the right of the search bar are buttons for "Select", "Select & Add More", and "Cancel". A sidebar on the right is titled "Guided Selling" and contains the following fields:

- What type of deployment? (dropdown menu set to "Onsite")
- Deployment setting? (dropdown menu set to "Commercial")
- How many Users (dropdown menu set to "--None--")

At the bottom of the sidebar are "Suggest" and "Clear Fields" buttons.

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION
ITPROPACK	IT Professional Pack	Service	
ITCORPPACK	IT Corporate Pack	Service	
ITSTARTERPACK	IT Starter Pack	Service	

Its all saved in the quote record – Process input value



Quote Line Editor UI

Add Quote Fields to Line Editor Use Case

Update Field Set

- Adds required fields to the Line Editor field set on the Quote object (SBQQ__Quote__c)

Line Editor ▾ Help for this Page ?

Save Cancel Undo Redo Field Set Properties

Quote Quick Find Quote Name

Method	Expires On	Markup (%)	Partner Discount	Ship To City	Ship To State	Target Customer A...
First Segment Ter...	Net Amount	Payment Terms	Ship To Country	Ship To Street	Start Date	Total Customer Di...
Discount	Introduction	Notes	Primary Contact	Ship To Name	Subscription Term	
	List Amount	Partner	Regular Amount	Ship To Postal Code		

Drag any of the fields above into the list below.

In the Field Set ⓘ

Start Date
Subscription Term
Target Customer Amount

Q-00001
Edit Quote

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

Quote Information

Start Date ? Subscription Term ? Target Customer Amount ?

Segmented Products		PRODUCT NAME	YEAR 1	TOTAL
<input type="checkbox"/>	# ►	PRODUCT CODE		
<input type="checkbox"/>	1 ►	RainBow	\$32.00	\$32.00
SUBTOTAL:			\$32.00	\$32.00

Quote Line Views Use Case

1. Default Quote Line item column view

Update Field Set

Adds required fields to the Line Editor field set on the Quote Line object (SBQQ__QuoteLine__c)

The screenshot shows the Line Editor interface with the following components:

- Line Editor** tab at the top.
- Field Set Properties** window open, showing a grid of fields under the **Quote Line** category. Fields include: Block Price, Contracted Price, Discount Schedule, Discount Tier, Price Dimension, Product, and Product Option.
- In the Field Set** list below, with a red box highlighting the following items:
 - Product Code
 - Product Name
 - Quantity
 - List Unit Price
 - Additional Disc.
 - Net Unit Price
 - Net Total
- Edit Quote** screen at the bottom with a red box highlighting the **Standard Products** section.
 - Header: Q-00001, Edit Quote, Add Products, Add Group, Delete Lines, Quick Save, Calculate, Cancel, Save.
 - Line Item: RainBow, RainBow, \$32.00, \$32.00, \$32.00.
 - Subtotal: \$32.00.
 - Table: Standard Products (rows 2-7).

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
2	ITPROPACK	IT Professional Pack	1.00	\$0.00		\$0.00	\$0.00
3	WIFIROUTER	WiFi Router	1.00	\$100.00		\$100.00	\$100.00
4	WIFIAP	WiFi Access Point	1.00	\$60.00		\$60.00	\$60.00
5	MS-OFFICE365	Microsoft Office 365	1.00	\$10.00		\$120.00	\$120.00
6	CLOUDSTORAGE	Cloud Storage 1GB	1.00	\$20.00		\$20.00	\$20.00
7	CLOUDSTORAGE	Cloud Storage 1GB	20.00	\$20.00		\$20.00	\$400.00
 - Subtotal: \$700.00.

1. Dynamic Quote Line item column view

Quote Line View		Standard										
<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL				
<input type="checkbox"/>	1	ITCORPPACK	IT Corporate Pack	1.00	\$0.00		\$0.00	\$0.00				
<input type="checkbox"/>	2	AP-MBPRO	↳ Apple MacBook Pro	1.00	\$1,500.00		\$1,500.00	\$1,500.00				

Quote Line View		Cost										
<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE		
<input type="checkbox"/>	1	ITCORPPACK	IT Corporate Pack	1.00	\$0.00		\$0.00			\$0.00		
<input type="checkbox"/>	2	AP-MBPRO	↳ Apple MacBook Pro	1.00	\$1,500.00	\$1,500.00	\$1,350.00			\$1,500.00		

Quote Line View		Partner										
<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	ITCORPPACK	IT Corporate Pack	1.00	\$0.00		\$0.00		\$0.00			
<input type="checkbox"/>	2	AP-MBPRO	↳ Apple MacBook Pro	1.00	\$1,500.00		\$1,500.00	\$1,500.00	\$1,500.00			

Create Quote Line Field Sets

Quote Line Field Set New Field Set

Help for this Page 

Field Set Edit Save Cancel

Enter Field Set information |= Required Information

Field Set Label	Standard
Field Set Name	Standard
Namespace Prefix	
Where is this used?	Quote Line Editor

In the Field Set 

Product Code
Product Name
Quantity
List Unit Price
Additional Disc.
Net Unit Price
Net Total

Quote Line Field Set New Field Set

Help for this Page 

Field Set Edit Save Cancel

Enter Field Set information |= Required Information

Field Set Label	Cost
Field Set Name	Cost
Namespace Prefix	
Where is this used?	Quote Line Editor

In the Field Set 

Product Code
Product Name
Quantity
List Unit Price
Regular Unit Price
Unit Cost
Markup
Additional Disc.
Net Unit Price
Net Total

New Field Set

Field Set Edit

Save Cancel

Enter Field Set information

= Required Information

Field Set Label	Partner
Field Set Name	Partner

Namespace Prefix

Where is this used?

Quote Line Editor

In the Field Set

- Product Code
- Product Name
- Quantity
- List Unit Price
- Partner Discount
- Partner Unit Price
- Net Unit Price
- Net Total

Makes expected EditLinesFieldSetName field to house view names
Create special Quote picklist field

Field Label i

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

Standard
Cost
Partner

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Field Name i

Update Line Editor Field Set on Quote object(SBQQ__Quote__c)

Field Sets					New	Field Sets Help 
Action	Field Label	Installed Package	API Name	Where is this used?		
Edit	 Calculating Fields	SteelBrick CPQ	SBQQ__CalculatingFields	Quote fields that trigger recalculation of quote lines.		
Edit	 Line Editor	SteelBrick CPQ	SBQQ__LineEditor	Quote fields displayed in Edit Lines page above the line items table.		



Pricing

PRICING METHODS

Most common pricing methods are available out-of-the-box

- List Pricing
- Cost + Markup Pricing
- Block Pricing, with optional overage rate
- Custom Pricing ("Special Price")
- Multi Dimensional Quoting

Contracted Prices (Customer-Specific Prices)

List Price - - What's on the price book

Cost + Mark Up – Cost on the product, add mark up to it.

Manual Addition. A pricing rule can be written to decide the mark up price.

Block Price- Fix price for a range. For 1- 100 minutes of calls, charge a fix amount of \$10. For calls between 101-200 minutes, charge a fix amount of \$15 and so on. Remember, this is not Qty multiplied with some sales price. This is fixed. Number of units become less important.

Custom Pricing - Create a formula to determine the pricing based on multiple factors

Multiple Dimension Quoting (Advanced Topic)– 3 yr term, in first year the customer wants to buy 2 licenses, 2nd year another 3 and third year another 4. You can create a product with three quantity fields, one for each year. If the term is increased to 4, an additional quantity field will be added automatically added. Each quantity field would have a start and end date. We can apply discount on each field individually.

Helpful Pricing Fields

The screenshot shows the "Quote Line Editor" interface. At the top, there are buttons for Save, Quick Save, Cancel, Add Products, Calculate, Delete Lines, and Groups. Below this is a section titled "Edit Line Fieldset on Quote". It includes fields for Start Date (2/1/2016), Subscription Term (36), and Target Customer Amount. A table below lists products with columns for Product Code, Product Name, Quantity, List Unit Price, Regular Unit Price, Unit Cost, Markup, Additional Disc., Net Unit Price, and Net Total. The table has four rows corresponding to items: Apple MacBook Pro, CPU22GHZI7, RAM8GB, and SSD256. The entire table is highlighted with a blue border. At the bottom, it shows a subtotal of \$1,500.00 and a quote total of \$1,500.00. The footer of the slide contains the text "Edit Line Fieldset on Quote Line" and the Salesforce logo.

Pricing Structure

Standard Item Extended Price = Unit x Quantity
Subscription Item Extended Price = Unit x Quantity x Prorated Term

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

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



Pricing Structure

Original Price		\$50.00
List Price	Unit Price x Term = \$50 x 6	\$200.00
- System Discounts	Discount Schedules	10%
→ Regular Price (*)		\$180.00
- Additional Discount	Discretionary discount entered by the sales rep	10%
→ Customer Price		\$162.20
- Partner Discount		50%
→ Partner Price		\$81.00
- Distributor Discount		-5%
→ Net Price	Goes into Pipeline/Forecast Amount	\$81.05

List Price is starting Price –

System discounts evaluated first. These are automated discounts called as “Discount Schedule” . to be covered later. To summarize its automatic volume based pricing. 1-10.. no disc, 11-20 10% and so on.

Regular Price.. after sys disc

Special Price – Programmatically determined price

Contracted Price – Price on an account basis . XYZ company to get a special price

Discounting

Additional (Discretionary/Manual) Discount

- Quote-level discounting (by percent)
- Quote Line-level discounting (by percent or amount)
- Target Customer Amount (applies auto-calculated line-level discount by amount)

Channel Discounts

- Partner Discount (quote and quote line, by percent)
- Distributor Discount (quote and quote line, by percent)

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



Volume Discount

Discount Schedule Overview

Automatically apply discounts based on term length

\$1.00 per unit per year Year 1 Year 2

\$0.80 per unit per year Year 1 Year 2 Year 3

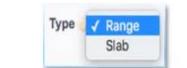
Term Discount

Discount Schedule Fields

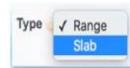
Field	Description
Schedule Name	Enter a meaningful name for the discount schedule.
Type	<ul style="list-style-type: none">Range: Discounted at the rate of whatever tier applies to the quote quantity.Slab: Discounted at the blended rate of whatever tier applies to the quoted quantity and all preceding 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
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



\$11.76 total



\$11.96 total

Aggregation Scope – None vs Quote

Add quantities of like products



Product Code	Quantity	List Unit Price	Regular Unit Price	Net Unit Price	Net Total
LJ-PAPERLETTER	7.00	\$10.00	\$10.00	\$10.00	\$70.00
LJ-PAPERLETTER	7.00	\$10.00	\$10.00	\$10.00	\$70.00



Product Code	Quantity	List Unit Price	Regular Unit Price	Net Unit Price	Net Total
LJ-PAPERLETTER	7.00	\$10.00	\$9.80	\$9.80	\$68.60
LJ-PAPERLETTER	7.00	\$10.00	\$9.80	\$9.80	\$68.60



★ Alfa	Add Products	Optional <input checked="" type="checkbox"/>	Subscription Term <input checked="" type="checkbox"/>			
	Additional Disc. (%) <input checked="" type="checkbox"/>					
#	PRODUCT CODE	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	NET UNIT PRICE	NET TOTAL
★ 1	LJ-PAPERLETTER	8.00	\$10.00	\$9.80	\$9.80	\$78.40
★ 2	LJ-PAPERLETTER	8.00	\$10.00	\$9.80	\$9.80	\$78.40
			SUBTOTAL:		\$156.80	

★ Beta	Add Products	Optional <input type="checkbox"/>	Subscription Term	<input type="text"/>
		Additional Disc. (%)		<input type="text"/>
#	PRODUCT CODE	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE
★	3 L1-PAPERLETTER	8.00	\$10.00	\$10.00
				NET UNIT PRICE \$10.00
				NET TOTAL \$80.00
				SUBTOTAL: \$80.00

Discount Schedule Use Case

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	5.00	\$10.00	\$10.00	\$10.00	\$50.00
SUBTOTAL:					\$50.00

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

Discount Schedule Use Case

<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-PAPERLETTER	LaserJet Paper Letter	10.00	\$10.00	\$10.00			% ▾	\$10.00	\$100.00			

<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-PAPERLETTER	LaserJet Paper Letter	11.00	\$10.00	\$9.80			% ▾	\$9.80	\$107.80			

<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-PAPERLETTER	LaserJet Paper Letter	21.00	\$10.00	\$9.50			% ▾	\$9.50	\$199.50			



Discount Schedule Edit

Information

■ = Required Information

Schedule Name Owner

Type Range

Cross Products

Discount Unit Percent

Cross Orders

Aggregation Scope Quote

Price Book Product

Constraint Field --None--

Quote Line Quantity Field Quantity

Excluded Pricebook IDs Include Bundled Quantities Account User Defined

Advanced Settings

Override Behavior --None--

Quote Price Scale 2 Quote Line Use Price For Amount Original Discount Schedule Edit Tiers
Steps of 10 units

Help for this Page

Edit Tiers

#	Tier Name	Lower Bound	Upper Bound	Discount (%)	
1	No Discount <input type="text"/>	1.00 <input type="text"/>	11.00 <input type="text"/>	0.000000000000 <input type="text"/>	
2	11-20 Units <input type="text"/>	11.00 <input type="text"/>	21.00 <input type="text"/>	2.000000000000 <input type="text"/>	
3	21-30 Units <input type="text"/>	21.00 <input type="text"/>	31.00 <input type="text"/>	5.000000000000 <input type="text"/>	
4	31-40 Units <input type="text"/>	31.00 <input type="text"/>	41.00 <input type="text"/>	8.000000000000 <input type="text"/>	
5	41+ Units <input type="text"/>	41.00 <input type="text"/>		10.000000000000 <input type="text"/>	

Associate Discount Schedule to a Product

Product Detail

Product Name	IT Professional Pack	Product Family
Product Code	ITPROPACK	Exclude From Opportunity  <input type="checkbox"/>
Active	<input checked="" type="checkbox"/>	Hide Price in Search Results  <input type="checkbox"/>
Hidden 	<input type="checkbox"/>	Asset Amendment Behavior  Default
Sort Order 		Asset Conversion  One per quote line
Component 	<input type="checkbox"/>	Quantity Editable  <input checked="" type="checkbox"/>
Optional 	<input type="checkbox"/>	Default Quantity  1.00000
Block Pricing Field  Quantity		Quantity Scale 
Specifications 		Lock Description  <input type="checkbox"/>
Configured Description Pattern 		CPQ External Id
Product Family Filter		

► Description Information

► Salesforce CPQ Configuration

▼ Pricing

Pricing Method  List	Cost Editable  <input type="checkbox"/>
Pricing Method Editable  <input type="checkbox"/>	Price Editable  <input type="checkbox"/>
Non Discountable  <input checked="" type="checkbox"/>	Non Partner Discountable  <input type="checkbox"/>
Compound Discount (%) 	Batch Quantity 
Include In Percent Of Total  <input type="checkbox"/>	Exclude From Percent Of Total  <input type="checkbox"/>
Term Discount Schedule 	Term Discount Level 
Discount Schedule  Steps of 10 units 	Discount Category 
Percent Of Total Constraint 	

Target customer Amount- sets the manually entered price as the final price and evenly applies that discount to all the line items to reach to that amount. This always take precedence over other discounts. No customization allowed on this.

Q-00000 Edit Quote		Add Products	Save	Quick Save	Cancel	↶	↷	Calculate	Delete Lines	Add Group
Quote Information										
Start Date	10/1/2017	Subscription Term	12	Target Customer Amount	\$3,000.00					
PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRI...	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL		
Loss and Damage Warranty	1.00	\$27.50	\$27.50		4.74 USD		\$22.76	\$22.76		
LaserJet Maintenance Kit	2.00	\$20.00	\$20.00		3.41 USD		\$16.59	\$33.18		
LaserJet Printer	2.00	\$275.00	\$275.00		46.94 USD		\$228.06	\$456.12		
LaserJet Toner Cartridge	4.00	\$125.00	\$125.00		21.34 USD		\$103.66	\$414.64		
Microsoft Office 365	20.00	\$10.00	\$120.00		20.48 USD		\$99.52	\$1,990.40		
LaserJet Paper Letter	10.00	\$10.00	\$10.00		1.71 USD		\$8.29	\$82.90		
SUBTOTAL:										\$3,000.00

The field highlighted below will not be automatically displayed and need to be added.

Q-00000 Edit Quote		Add Products	Save	Quick Save	Cancel	↶	↷	Calculate	Delete Lines	Add Group
Quote Information										
Start Date	10/1/2017	Subscription Term	12	Target Customer Amount						
#	OPTIONAL	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRI...	UNIT COST	MARKUP	ADDITIONAL DISC.	
1		LDWARRANTY	Loss and Damage Warranty	1.00	\$27.50	\$27.50				
2		LJ-MAINTKIT	LaserJet Maintenance Kit	2.00	\$20.00	\$20.00				
3		LJ-PRINTER	LaserJet Printer	2.00	\$275.00	\$275.00				
4		LJ-TONER	LaserJet Toner Cartridge	4.00	\$125.00	\$125.00				
5		MS-OFFICE365	Microsoft Office 365	20.00	\$10.00	\$120.00				

Pricing Methods

Most common pricing methods are available out-of-the-box

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

Cost and Margin

Cost Object

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

Margin

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

EX21: Block Pricing Use Case

The company offers a recycling service for toner cartridges. This particular service is not offered on a price per quantity basis. Rather, for specific interval of quantity, a flat fee is applied. However, if one of their customers desires to purchase a quantity that is greater than their interval-based flat fee structure, they would then like to charge a per-quantity fee.

Block Pricing Use Case

<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"/>	% <input type="button" value="▼"/>	\$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"/>	% <input type="button" value="▼"/>	\$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"/>	% <input type="button" value="▼"/>	\$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"/>	% <input type="button" value="▼"/>	\$26.00	\$26.00			

Update Product Price Method

▼ SteelBrick Information

Pricing Method Block <input type="checkbox"/>	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 Prices

New Block Price Edit All Block Prices Help

No records to display

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"/>

Create special Block Price currency field

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

Step 2. Enter the details Step 2 of 4

Field Label [i](#)

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

Length Number of digits to the left of the decimal point

Field Name [i](#)

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

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

Create Overage tier

Information = Required Information

Price Name <input type="text" value="51+"/>	Owner Admin User
Lower Bound <input type="text" value="51"/>	Product <input type="text" value="Toner Recycling"/> 🔍
Upper Bound <input type="text" value=""/>	Price Book <input type="text" value="Standard Price Book"/> 🔍
OverageRate <input type="text" value="1.00"/>	Price <input type="text" value="26.00"/>

Cost and Margin

Cost Object

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

Only one cost per product. Two will not aggregate it.

Margin

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



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Cost + Mark Up –
Open a product- Laser Jet. Add a cost to it

Cost Detail	
Cost #	COST-000000
Active	<input checked="" type="checkbox"/>
Unit Cost	\$50.00
Created By	Satyaranayana Pusuluri, 11/8/2018 2:38 AM
Last Modified By	Satyaranayana Pusuluri, 11/8/2018 2:38 AM

Owner Satyanarayana Pusuluri [Change]

Product LaserJet Printer

Product
LaserJet Printer

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[Back to List: Products](#)

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

Product Detail

Product Name	LaserJet Printer	Active	<input checked="" type="checkbox"/>
Product Code	LJ-PRINTER	Product Family	Hardware
Deployment Type			
Deployment Setting			
Created By	TrainingKit, 10/31/2018 10:43 PM	Last Modified By	Satyaranayana Pusuluri, 11/8/2018 2:37 AM
Product Description			
Number of Users			

SteelBrick Information

Pricing Method	<input checked="" type="checkbox"/> Cost	Pricing Method Editable	<input type="checkbox"/>
Quantity Editable	<input checked="" type="checkbox"/> ✓	Exclude From Opportunity	<input type="checkbox"/>
Non Discountable	<input checked="" type="checkbox"/> <input type="checkbox"/>	Hidden	<input type="checkbox"/>
Discount Schedule		Lock Description	<input type="checkbox"/>
Price Editable	<input checked="" type="checkbox"/> <input type="checkbox"/>	Optional	<input type="checkbox"/>
Cost Editable	<input checked="" type="checkbox"/> <input type="checkbox"/>	Sort Order	<input type="checkbox"/>

Change the pricing method
to Cost from Price

We will see an extra column added in the quote for mark up where we can add % or \$ and calculate.

Q-00000
Edit Quote

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

Quote Information

Start Date 10/1/2017 Subscription Term 12 Target Customer Amount

PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRI...	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
LaserJet Printer	1.00	\$275.00	\$55.00	\$50.00	10.00 %		\$55.00	\$55.00

SUBTOTAL: \$55.00

Discount Schedule Order of Precedence

Contracted Price

Option

Feature

Product

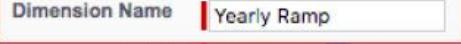
Multi Dimensional Quoting Use Case

YEAR									
<input type="checkbox"/>	# ►	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"/>	% ▾	<input type="text"/>	% ▾	<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	

Price Dimensions		New Price Dimension		Price Dimensions Help	
Action	Dimension Name	Type	Unit Price	Created By	
Edit Del	Yearly Ramp	Year		Satyanarayana Pusuluri, 7/19/2018 3:44 AM	
Edit Del	Activation	One-time	\$40.00	Satyanarayana Pusuluri, 7/19/2018 3:44 AM	

Create Price Dimensions

Information ! = Required Information

Product  Cloud Storage 1GB 	Quantity Editable  Inherit 
Dimension Name  <input type="text" value="Yearly Ramp"/>	Default Quantity  <input type="text"/>
Type  Year 	Quantity Scale  <input type="text"/>
Price Book  <input type="text"/> 	

Information ! = Required Information

Product  Cloud Storage 1GB 	Quantity Editable  Inherit 
Dimension Name  <input type="text" value="Activation"/>	Default Quantity  <input type="text"/>
Type  One-time 	Quantity Scale  <input type="text"/>
Price Book  <input type="text"/> 	

Pricing

Unit Price  40	Price Editable  Inherit 
Non Discountable  Inherit 	Non Partner Discountable  Inherit 

Price 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

Composite Summary Variable

A Summary Variable with an additional calculation

- Add
- Subtract
- Multiply
- Divide

Calculate using

- Static Value
- Another 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.
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.
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

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.

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EX23: Maintenance Kit Price Rule Use Case

The company would like automate the quantity of the Maintenance Kit in accordance with the number of Printers being quoted. For each printer added to a quote, should they also be quoting a Maintenance Kit, they would like to guarantee that 2 maintenance kits are sold per printer.

Maintenance Kit Price Rule

Set quantity of LJ-MAINTKIT to always be twice the quantity of LJ-PRINTER

The screenshot shows the 'Quote Line Editor' interface with the identifier 'Q-00000'. The top navigation bar includes 'Save', 'Quick Save', 'Cancel', a refresh icon, 'Add Products', 'Calculate', 'Delete Lines', and 'Groups'. Below this is a section for 'Quote Information' with fields for 'Start Date' (3/1/2016), 'Subscription Term' (12), and 'Target Customer Amount'. The main area displays a table of items:

<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			

Create Price Rule

Information

= Required Information

Price Rule Name Set quantity of LJ-MAINTKIT to twice the quantity of LJ-PRINTER

Evaluation Scope Calculator

Conditions Met All

Evaluation Event Available
On Load
After Calculate Chosen
On Calculate

Active

Evaluation Order 10

Product [Search icon]

Lookup Object --None--

Create Condition

Information

= Required Information

Price Rule Set quantity of LJ-MAIN

Object Quote Line

Field Product Code

Tested Variable [Search icon]

Tested Formula [Large input field]

Filter Information

Operator equals

Filter Type Value

Filter Value LJ-MAINTKIT

Filter Variable [Search icon]

Filter Formula [Large input field]

Create Summary Variable

Information = Required Information

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

Filter Information

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

Composite Information

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

Create Price Action

Information = Required Information

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

Price Action Sources

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

Exercise : Set quantity of WIFIAP so there is always 1 for every 12 AP-MBPRO

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	RAM8GB	RAM 8GB		14.00	Included	\$0.00	Included			\$0.00	\$0.00				
4	SSD256	SSD Hard Drive 256GB		14.00	Included	\$0.00	Included			\$0.00	\$0.00				
	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

Create Price Rule

Information

= Required Information

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

WiFi Access Point Price Rule

Implementation Process Overview

Create Condition

Information

= Required Information

Price Rule	Set quantity of WIFIAP
Object	Quote Line
Field	Product Code
Tested Variable	<input type="text"/>
Tested Formula	<input type="text"/>

Filter Information

Operator	equals
Filter Type	Value
Filter Value	WIFIAP
Filter Variable	<input type="text"/>

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
Constraint Field: --None--

Composite Information

Composite Operator: Divide

Variable Element:

Value Element: 12

= Required Information

WiFi Access Point Price Rule

Implementation Process Overview

Create first Price Action

Information

Target Object: Quote Line
Target Field: SBQQ_Quantity_c

Value:
Formula:

Rule: Set quantity of WIFIAP to
Order: 1

Price Action Sources

Source Field:
Source Lookup Field: --None--

Source Variable: Total quantity of AP-MBPRO divided by 12

= Required Information

WiFi Access Point Price Rule

Implementation Process Overview

Create second Price Action

Information

Target Object: Quote Line
Target Field: SBQQ__Quantity_c
Value:
Formula: CEILING(SBQQ__Quantity_c)

Rule: Set quantity of WIFIAP
Order: 2

Price Action Sources

Source Field:
Source Variable:

Source Lookup Field: --None--

= Required Information

EX24: 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				
	3	RAM8GB	↳ RAM 8GB	14.00	Included		\$0.00	Included			\$0.00	\$0.00				
	4	SSD256	↳ SSD Hard Drive 256GB	14.00	Included		\$0.00	Included			\$0.00	\$0.00				
	5	WIFIAP	WiFi Access Point	2.00	\$60.00	\$60.00					\$60.00	\$120.00				

EX25: Discount Schedule Price Rule Use Case

The company would like to offer different discount tiers for a single product on the basis of whether the quote is being produced for a Canadian customer versus a customer from the United States. When creating a new quote, they would like the sales user to have the freedom to set a picklist value to declare the destination country (for the purpose of this example, this will most often be automated in implementation).

Discount Schedule Price Rule Use Case

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
<input type="checkbox"/>	1	MDPTOVGA	Mini DisplayPort to VGA Adapter	501.00	\$30.00	\$30.00	\$20.00		% ▾	\$30.00	\$15,030.00

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
<input type="checkbox"/>	1	MDPTOVGA	Mini DisplayPort to VGA Adapter	501.00	\$30.00	\$28.80	\$20.00		% ▾	\$28.80	\$14,428.80

	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	REGULAR UNIT PRICE	UNIT COST	MARKUP	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
<input type="checkbox"/>	1	MDPTOVGA	Mini DisplayPort to VGA Adapter	501.00	\$30.00	\$28.20	\$20.00		% ▾	\$28.20	\$14,128.20

Create two Discount Schedules

- Defines differing discount pricing for United States and Canada

Create Quote picklist field

- Makes Region__c available to select on all quote

Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

Create first Condition

- Makes rule fire when Region is not blank

Create second Condition

- Makes rule fire when MDPTOVGA line items are encountered

Create Price Action

- Injects discount schedule SFID into SBQQ__DiscountSchedule__c

Discount Schedules Price Rule

Implementation Process Overview

Create two Discount Schedules

Information ■ = Required Information

Schedule Name	United States	Owner	Admin User
Type	Range	Cross Products	<input type="checkbox"/>
Discount Unit	Percent	Cross Orders	<input type="checkbox"/>
Aggregation Scope	Quote	Include Bundled Quantities	<input type="checkbox"/>

Edit Tiers Save Cancel

#	Tier Name	Lower Bound	Upper Bound	Discount (%)	
1	1-100	1.00	101.00	-2	+ -
2	101-500	101.00	501.00	0	+ -
3	501+	501.00		4	+ -

Save Cancel

Create two Discount Schedules

Information ■ = Required Information

Schedule Name	Canada	Owner	Admin User
Type	Range	Cross Products	<input type="checkbox"/>
Discount Unit	Percent	Cross Orders	<input type="checkbox"/>
Aggregation Scope	Quote	Include Bundled Quantities	<input type="checkbox"/>

Edit Tiers Save Cancel

#	Tier Name	Lower Bound	Upper Bound	Discount (%)	
1	1-100	1.00	101.00	0	+ -
2	101-500	101.00	501.00	2	+ -
3	501+	501		6	+ -

Save Cancel

Create Quote picklist field

Field Label i

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

United States
Canada

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Field Name i

Create Price Rule

Information = Required Information

Price Rule Name

Evaluation Scope i ▼

Conditions Met i ▼

Calculator Evaluation Event i ► ◀

Active i

Evaluation Order i

Product i 🔍

Lookup Object i ▼

Create first Condition

Information

Price Rule Region-based Discount 1

Object Quote

Field Region__c

Tested Variable

Tested Formula

Filter Information

Operator not equals

Filter Type Value

Filter Value

Filter Variable

Filter Formula

■ = Required Information

Create second Condition

Information

Price Rule Region-based Discount 1

Object Quote Line

Field Product Code

Tested Variable

Tested Formula

Filter Information

Operator equals

Filter Type Value

Filter Value MDPTOVGA

Filter Variable

Filter Formula

■ = Required Information

Injects discount schedule SFID into SBQQ__DiscountSchedule__c

Create Price Action

Information |= Required Information

Target Object ? <input type="text" value="Quote Line"/>	Rule ? <input type="text" value="Region-based Discount"/> []
Target Field ? <input type="text" value="SBQQ__DiscountSchedule__c"/> []	Order ? <input type="text"/>
Value ? <input type="text"/>	
Formula ? <input "a0c36000001b828",<br="" states",="" type="text" united="" value="CASE(SBQQ__Quote__r.Region__c,
"/> "Canada", "a0C36000001b82I", "")"/>	

Price Action Sources

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

Partner Discount Use Case

Account Detail

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

Partner Discount Price Rule

Implementation Process Overview

- Makes Partner Level available on accounts

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- ## Create Quote text formula field

- Copies account Partner Level value to the quote

- ## Create Price Rule

- Begins rule that evaluates on the Quote Line Editor

- ## Create Condition

- Makes rule fire when Partner Level is not blank



Partner Discount Price Rule

Implementation Process Overview

Create Account picklist field

Field Label

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

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

Field Name

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: [More Examples ...](#)

Quick Tips

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

Functions

-- All Function Categories

Partner Level (Text) =

Partner Discount Price Rule

Implementation Process Overview

Create Price Rule

Information

= Required Information

Price Rule Name	Partner Discount	
Evaluation Scope	Calculator	
Conditions Met	All	
Calculator Evaluation Event	Available On Initialization Before Calculate	Chosen On Calculate
Active	<input checked="" type="checkbox"/>	
Evaluation Order	50	
Product	<input type="text"/>	
Lookup Object	--None--	

Check if partner level is not blank, fire this rule

Partner Discount Price Rule

Implementation Process Overview

Create Condition

Information

= Required Information

Price Rule	Partner Discount
Object	Quote
Field	Partner_Level__c
Tested Variable	<input type="text"/>
Tested Formula	<input type="text"/>

Filter Information

Operator	not equals
Filter Type	Value
Filter Value	<input type="text"/>
Filter Variable	<input type="text"/>
Filter Formula	<input type="text"/>

Partner Discount Price Rule

Implementation Process Overview

Create Price Action

Information

Target Object: Quote Line
Target Field: SBQQ_PartnerDiscount_c

Rule: Partner Discount
Order:

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

Price Action Sources

Source Field:
Source Variable:

Source Lookup Field: --None--

= Required Information

EX27: Partner Discount Price Rule

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

Creating a Lookup Object

EX28: Creating a Lookup Object Use Case

The company seeks to bring more granularity to the discounts applied on the basis of the partner level set at the account. As they want to extend the dynamism of the discounts applied on a line-by-line basis, they have determined that specific discounts need to be applied on the basis of the product family. Their first order of business in this regard is to make sure they have established an area to store the data relative to the per family discounts they intend to apply.

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 Tab and View

- Makes custom object and data easily accessible

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

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

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

Starts with vowel sound

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

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

Enter Record Name Label and Format

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

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

Data Type Auto Number
Display Format PLD-{0000}
Starting Number 0001

Example: A-{0000} What Is This?



Everything that you want to query should be available on this object as a field

Lookup Object

Implementation Process Overview

Create Object fields

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label Partner Level

Values

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

Bronze
Silver
Gold



Lookup Object

Implementation Process Overview

Create Object fields

Step 2. Enter the details Step 2 of 4

Field Label i

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

Hardware
Software
Support

Previous Next Cancel

Lookup Object

Implementation Process Overview

Create Object fields

Step 2. Enter the details Step 2 of 4

Field Label i

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

Length Number of digits to the left of the decimal point

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

Field Name i

Previous Next Cancel

Lookup Object

Implementation Process Overview

Create Tab and View

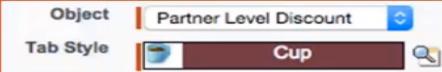
Step 1. Enter the Details Step 1 of 3

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

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

Object: Partner Level Discount

Tab Style: Cup



Lookup Object

Implementation Process Overview

Create Tab and View

Step 1. Enter View Name

View Name: Partner Discount Table

View Unique Name: Partner_Discount_Table

Step 3. Select Fields to Display

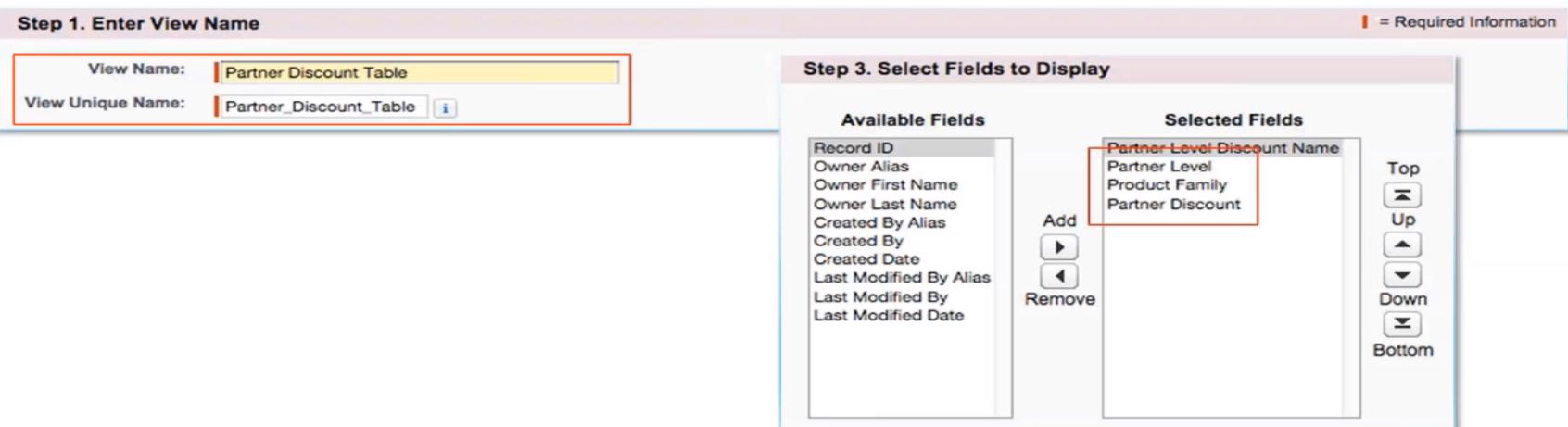
Available Fields:

- Record ID
- Owner Alias
- Owner First Name
- Owner Last Name
- Created By Alias
- Created By
- Created Date
- Last Modified By Alias
- Last Modified By
- Last Modified Date

Selected Fields:

- Partner Level Discount Name
- Partner Level
- Product Family
- Partner Discount

Add ▶ Remove ▷ ▲ ▼ Top □ Up □ Down □ Bottom



Create every combination accounted for. No Duplicates. No missing values

Lookup Object

Implementation Process Overview

Create Object records

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

Will pick up the discount percent from below table. If no match found then will use the blanked discount.

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

EX28: Create a Lookup Object

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

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

EX29: Partner Discounts by Product Family Use Case

Now that there is an object which houses the values of the per family product discounts, the company needs to guarantee that these values are applied to the products on any quote that will be produced. For the families not identified as requiring the more granular discount, the previously established default discount should still apply.

Partner Discount by Product Family Use Case



Account Detail
Save Cancel
Account Owner: Admin User [Change]
Account Name: MondoCorp [View Hierarchy]
Parent Account:
Account Number:
Account Site: --None--
Partner Level: Silver Gold Bronze

			QUANTITY	LIST UNIT PRICE	PARTNER DISCOUNT	PARTNER UNIT PRICE	NET UNIT PRICE	NET TOTAL
<input type="checkbox"/>	2	AP-TBDISPLAY	Apple Thunderbolt Display	1.00	\$75.00		\$1,800.00	\$1,800.00 \$1,800.00
<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

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

Price Rule Name: Partner Discount by Product Family

Evaluation Scope: Calculator

Conditions Met: All

Calculator Evaluation Event:

- Available: On Initialization, Before Calculate
- Chosen: On Calculate

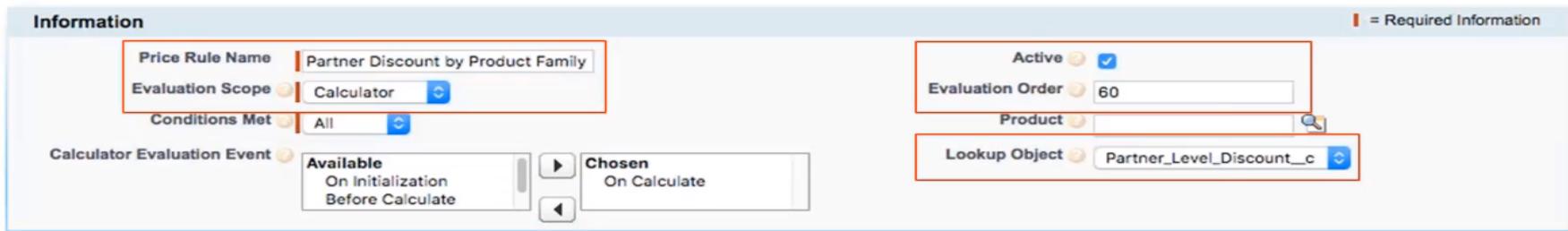
Active:

Evaluation Order: 60

Product:

Lookup Object: Partner_Level_Discount_c

= Required Information



This is 60 because we want the last one to win

Partner Discounts by Product Family

Implementation Process Overview

Create Condition

Information

Price Rule: Partner Discounts by Pr

Object: Quote

Field: Partner_Level_c

Tested Variable:

Tested Formula:

Filter Information

Operator: not equals

Filter Type: Value

Filter Value:

Filter Variable:

Filter Formula:

= Required Information



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
Tested Value:

Price Rule: Partner Discounts by Pro

Lookup Information

Operator: equals
Lookup Field: Product_Family__c

Partner Discounts by Product Family

Implementation Process Overview

Create Lookup Queries

Information

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

Price Rule: Partner Discounts by Pr

Lookup Information

Operator: equals
Lookup Field: Partner_Level__c

Partner Discounts by Product Family

Implementation Process Overview

Create Price Action

Information

Target Object: Quote Line
Target Field: SBQQ_PartnerDiscount__c
Value:
Formula:

Rule: Partner Discounts by Pr
Order: 1

Price Action Sources

Source Field:
Source Variable:
Source Lookup Field: Partner_Discount__c

= Required Information

The screenshot shows the 'Create Price Action' screen. It has two main sections: 'Information' and 'Price Action Sources'. In the 'Information' section, 'Target Object' is set to 'Quote Line' and 'Target Field' is set to 'SBQQ_PartnerDiscount__c'. A red box highlights these fields. Below them are 'Value' and 'Formula' input fields. To the right, 'Rule' is set to 'Partner Discounts by Pr' and 'Order' is set to '1'. A red box highlights the 'Rule' field. In the 'Price Action Sources' section, 'Source Field' and 'Source Variable' are empty. 'Source Lookup Field' is set to 'Partner_Discount__c', which is highlighted with a red box.

EX29: 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

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom pro
more! [Don't show this message again](#)

Custom Object Definition Edit

[Save](#)

[Save & New](#)

[Cancel](#)

Custom Object Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound

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

Object Name Example: Account

Description

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 Case is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

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

Starting Number

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups

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

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

Complete the Tab creation wizard

Satyanarayana Pusuluri

New Custom Field

Step 2. Enter the details

Field Label

Values Use global picklist value set

Enter values, with each value separated by a new line

Display values alphabetically, no

Use first value as default value

Restrict picklist to the values def

The Field Name is an internal reference and is used for integration purposes such as custom links, custom s-controls, and the API. Be careful when changing the Field Name as it may affect existing integrations.

Field Name

Partner Level Discount New Custom Field

Field Label

Values Use global picklist value set

Enter values, with each value separated by a new line

Hardware
Software
Support

Step 2. Enter the details

Enter a label to be u
layouts, reports, and

Field Label

Please enter the length of the number and the number of
accept values up to "12345678.90".

Length

Number of digits to the left of the decimal point

Field Name

Description

Create a new view for Partner Level Discount

Home Accounts Opportunities Quotes Products Product Rules Price Rules



Partner Discounts ▾ Edit | Delete | Create New View

New Partner Level Discount

Change Owner



Partner Level Discount Name ↑

Partner Level

No records to display.



EX28: Create a Lookup Object

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

The screenshot shows a Salesforce page titled "Partner Discount Table". At the top, there are buttons for "New Partner Level Discount", "Change Owner", and a help icon. Below the header, there is a search bar with the placeholder "Partner Level Discount Name ↑" and a "Partner Level" filter. A message "No records to display." is shown. The main area displays a table with columns: Action, Partner Level Discount Name, Partner Level, Product Family, and Partner Discount. The table contains the following data:

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



Price Rule

Partner Discounts by Product Family

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help](#)[« Back to List: Custom Object Definitions](#)

Price Rule Detail

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

Price Rule Name	Partner Discounts by Product Family	Active	<input checked="" type="checkbox"/>
Evaluation Scope	Calculator	Evaluation Order	60
Conditions Met	All	Product	<input type="checkbox"/>
Calculator Evaluation Event	On Calculate	Lookup Object	Partner_Level_Discount__c
Configurator Evaluation Event	<input type="checkbox"/>		

Created By Admin User, 6/14/2017 10:42 AM

Last Modified By Admin User, 6/14/2017 10:42 AM

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

Price Condition Edit

New Price Condition

Price Condition Edit

[Save](#) [Save & New](#) [Cancel](#)

Information

Price Rule	<input type="text"/> Partner Discounts by Prod	
Object	<input type="text"/> Quote	
Field	<input type="text"/> Partner_Level__c	
Tested Variable	<input type="text"/>	
Tested Formula	<input type="text"/>	

Filter Information

Operator	<input type="text"/> not equals
Filter Type	<input type="text"/> Value
Filter Value	<input type="text"/>

Add Pick List Values to tested field and lookup field

Add Picklist Values Lookup Field

Add one or more picklist values be

If a value matches an inactive value

If a value matches an inactive value

Partner_Level_c
Product_Family_c



Lookup Query Edit

New Lookup Query

[Help for this Form](#)

Lookup Query Edit

Saving...

Information

 = Required Information

Match Type  **Field Value**

Price Rule ⚡ Partner Discounts by Prod ⚡

Tested Object Quote

Product Rule

Tested Field Partner Level c

Tested Value

Tested Configuration Attribute

Lookup Information

Operator  equals ▾

Lookup Field Partner_Level_c

Saving... Saving... Saving...



Lookup Query Edit

New Lookup Query

Help for this Page

Lookup Query Edit

[Save](#) [Save & New](#) [Cancel](#)

Information

= Required Information

Match Type **Field Value** ▾
Tested Object **Quote Line** ▾
Tested Field **SBQQ__ProductFamily__c** ▾
Tested Value
Tested Configuration Attribute

Price Rule **Partner Discounts by Prod**
Product Rule

Lookup Information

Operator **equals** ▾Lookup Field **Product_Family__c** ▾[Save](#) [Save & New](#) [Cancel](#) **5**[Edit Layout](#) | [Printable View](#) | [Help](#)[« Back to List: Custom Object Definitions](#)

Price Action Detail

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

Action # **5**
Target Object **Quote Line**
Target Field **SBQQ__PartnerDiscount__c**
Value
Formula

Rule **Partner Discounts by Product Family**
Order

▼ Price Action Sources

Source Field
Source Lookup Field **Partner_Discount__c**

Source Variable Created By **Admin User, 6/14/2017 10:44 AM**Last Modified By **Admin User, 6/14/2017 10:44 AM**[Edit](#) [Delete](#) [Clone](#)

Q-00006
Edit Quote

Add Hardware

Add Products

 Add Group

Delete Lin

5

Quick Sa

e Calculate

Cance

Save

#	Product Code	Product Name	List Unit Price	Quantity	Partner Discount	Partner Unit Price	Net Unit Price	Net Total	Actions
1	ITPROPACK	IT Professional Pack	\$0.00	1.00	20.00	\$0.00	\$0.00	\$0.00	  
2	AP-MBPRO	Apple MacBook Pro	\$1,500.00	1.00	10.00	\$1,350.00	\$1,350.00	\$1,350.00	
3	CPU22GHZI7	CPU 2.2GHz i7	Included	1.00	10.00	\$0.00	\$0.00	\$0.00	
4	RAM8GB	RAM 8GB	Included	1.00	10.00	\$0.00	\$0.00	\$0.00	
5	SSD256	SSD Hard Drive 256GB	Included	1.00	10.00	\$0.00	\$0.00	\$0.00	
6	ADMINHOUR	Admin Hour	\$75.00	1.00	5.00	\$2,565.00	\$2,565.00	\$2,565.00	 
7	AP-MAGICMOUSE	Apple Magic Mouse	\$80.00	1.00	10.00	\$72.00	\$72.00	\$72.00	 
8	AP-MB	Apple MacBook	\$1,000.00	1.00	10.00	\$900.00	\$900.00	\$900.00	  

Quote Templates

Quote Template Use Case

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

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

SALESPERSON	EXT	EMAIL	DELIVERY METHOD	PAYMENT TERMS
Admin User	x	kpapp@salesforce.com		Near 30

QTY	PART #	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
1.00	CLOUDSTORAGE		\$40.00		\$40.00
1.00	CLOUDSTORAGE		\$20.00		\$20.00
2.00	CLOUDSTORAGE		\$20.00		\$40.00
6.00	CLOUDSTORAGE		\$20.00		\$120.00
6.00	AP-AMP40	16" Apple Macbook Pro (2016)	\$1,800.00		\$7,200.00
6.00	CPU260H27		\$250.00		\$1,500.00
6.00	RAM16GB		\$125.00		\$750.00
5.00	SSD512		\$150.00		\$750.00
5.00	AP-USKEYBOARD		\$50.00		\$250.00
8.00	AP-TBDISPLAY		\$1,000.00		\$8,000.00
1.00	LJ-PRINTER		\$275.00		\$275.00
1.00	LJ-TONER		\$125.00		\$125.00
1.00	LJ-MANTHT		\$20.00		\$20.00
1.00	WIFIROUTER		\$100.00		\$100.00
1.00	WIFIP		\$80.00		\$80.00
1.00	WIFIINSTALL		\$300.00		\$300.00
1.00	LOWMANHOUR		\$843.75		\$1,012.50
5.00	MS-OFFICE365		\$10.00		\$50.00
10.00	ADMIN-HOUR		\$75.00		\$750.00
TOTAL:					\$47,186.25

Terms & Conditions

This quote is presented to the customer under the condition that it remains a valid quote for only 15 days after the stated Quote Date, after which the quote becomes null and void.
Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi assuefactum est, quod dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi

Quotation

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

BILL TO:
MondoCorp
234 Second St
Chicago, IL 60657
United States

ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptate nulla pariatur?
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam,
quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum
dolor eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Ali vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corupti quos dolores et quos molestias
excepturi sint occaecat cupidatat non proident, similique sunt in culpa qui officia deserunt mollit animi, id est laborum et dolorum fuga. Et harum
quidem non um facill et ei expedita distinctio.
Nam libero tempore, cum soluta nobis est eligendi optio cumque nihil impedit quo minus id quod maxime pascere possimus, omnis voluptas
assumenda est, omnis dolor repellendus. Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus sepe overlet ut et voluptates
repudiandis sint or molestiae non noscitur. Iusque cumur rerum hie tenuit a sagittis doctetus, at aut recendis voluptatibus malores alias
consecutus aut perferendis doloribus experies repelat.
This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.

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

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

THANK YOU FOR YOUR BUSINESS!

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

Create Quote Template

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

Upload Logo File

Implementation Process Overview

Create Document

1. Enter details ■ = Required Information

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

Upload Logo File

Implementation Process Overview

Update Quote Template field

Quote Template
Training Proposal

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

[« Back to List: Documents](#)

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

Quote Template Detail

Template Name	Training Proposal	Save Cancel
Deployment Status	In Development	Default ? Delete
Generator Name		Logo Document Id 01536000000LB5d Delete
		Watermark ID Delete

Upload Draft Image logo in shared document folder and assign SFID to Watermark ID

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 'Watermark ID' field contains the value '01536000001dJ2V' and is highlighted with a red box. Other fields visible include 'Template Name' (Training Proposal), 'Deployment Status' (In Development), and 'Generator Name'.

Add Draft Watermark

Implementation Process Overview

Update Quote layout

The screenshot shows the quote layout page. In the 'Print Line Items' section, the 'Watermark Shown' checkbox is checked and highlighted with a red box. Other sections visible include 'Discount Information', 'Quote Options' (with 'Group Line Items' checked), and 'Address Information'.

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**

Q-00011
Preview Document

Document Options

Template Training Proposal

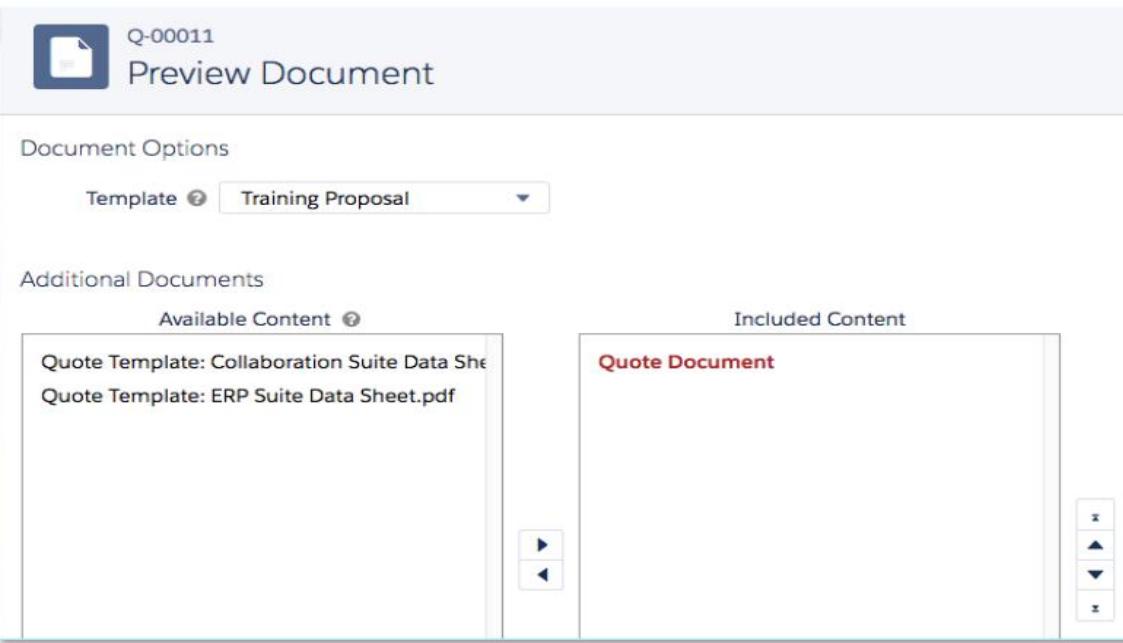
Additional Documents

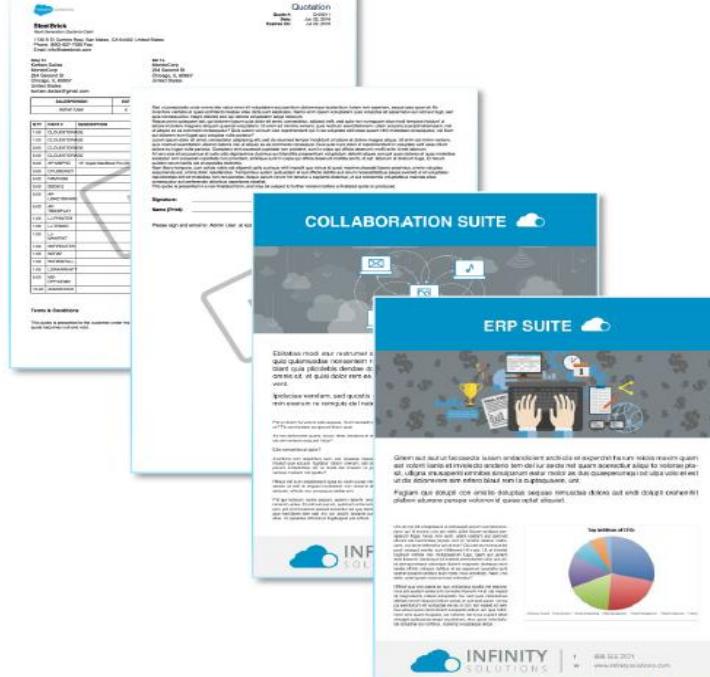
Available Content (1)

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

Included Content

Quote Document





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

Create Template Sections

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

Create sections for the following template content:

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

Update Quote Template fields

▼ Style Information

Font Family Helvetica	Font Size 9.0
Shading Color DDDDDD	Border Color 05A0DF
Group Shading Color 05A0DF	Group Text Color 000000
Group Gap (px) 15	Text Color 000000
Term Body Indent (px) 15	

Update Template Content

```
<table width="100%">
  <tbody>
    <tr>
      <td style="width:50%; height:250px;">
        <p style="color:#000000; font-size:24pt;"><b>Software Solution</b></p>
        <p style="color:#000000; font-size:24pt;"><b>Proposal For {!quote.SBQQ__BillingName__c}</b></p>
        <p>#160;</p>
        <p>#160;</p>
```

Create MDQ Table

Implementation Process Overview

Create Template Content

Template Content

= Required Information

Content Name	MDQ Items as Columns
Font Family	--None--
Text Color	
Type	Line Items
Font Size	
Table Style	Price Dimensions as Columns

Create Template Section

Information

= Required Information

Section Name	MDQ Items
Top Margin	0.00
Display Order	45
Conditional Print Field	--None--
Template	Training Proposal
Content	MDQ Items as Columns
Bottom Margin	0.00
Summary Display	--None--

Create Line Column

Information

= Required Information

Column Heading	START DATE
Display Order	15
Width	15
Section	MDQ Items
Template	Training Proposal
Field Name	SBQQ_StartDate_c
Alignment	Left

Conditional Discount Column

Implementation Process Overview

Update Line Columns

Column Options

Hide On Components

Roll Up

Conditional Print Field SBQQ__AdditionalDiscountAmount__c

Discard Width When Hidden

Column Heading Field --None--

Dynamic Number Scale

Separate Line

Summary Level All

Summary Function --None--

Summary Label

Sub Group Summary Label

Save Save & New Cancel

Conditional Pricing Columns

Implementation Process Overview

Create Quote checkbox field

Field Label Show Pricing Columns

Default Value Checked Unchecked

Field Name Show_Pricing_Columns

Update Line Columns

Column Options

Hide On Components

Roll Up

Conditional Print Field Show_Pricing_Columns_c

Discard Width When Hidden

Column Heading Field --None--

Dynamic Number Scale

Separate Line

Summary Level All

Summary Function --None--

Summary Label

Sub Group Summary Label

Save Save & New Cancel

Thank you

