



Salesforce CPQ Cert Prep & Best Practices

Partner Practice Development

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Salesforce CPQ

Agenda

Salesforce CPQ Overview

- *Intro and High level CPQ overview*

Products and Bundles

9:00 - 10:45

- *Product setup, Bundle Structure, Option Constraints, Configuration Attributes, Product Rules*

Pricing and Discounts

- *Pricing Waterfall, Pricing Methods, Price Rules*

Quote Templates

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

Contracting Process

- *Contract Creation, Amendments, Renewals*

CPQ Platform

- *Package Settings, Debugging*

CPQ Implementation Methodology

11:00 - 12:30

Billing Overview and Product Roadmap

OUTLINE

PRE-REQUISITES

Qualified attendees should have completed the following:

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

Post Workshop Requirements:

- Review articles in the SteelBrick Community suggested by the CPQ Specialist Study Guide
- Practice exercises



CPQ Life Cycle

A Happy Path

Configure-Price-Quote (CPQ) Life Cycle

Happy Path



Sales



START

Configure-Price-Quote (CPQ) Life Cycle

Happy Path



Sales



START



Product/Pricing
Manager



CONFIGURE

Configure-Price-Quote (CPQ) Life Cycle

Happy Path



Salesforce CPQ Life Cycle

Happy Path



Salesforce CPQ Life Cycle

A Happier Path



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Product
Configuration



Pricing &
Discounting

Entire Customer Sales Cycle on Single Platform



Product
Configuration

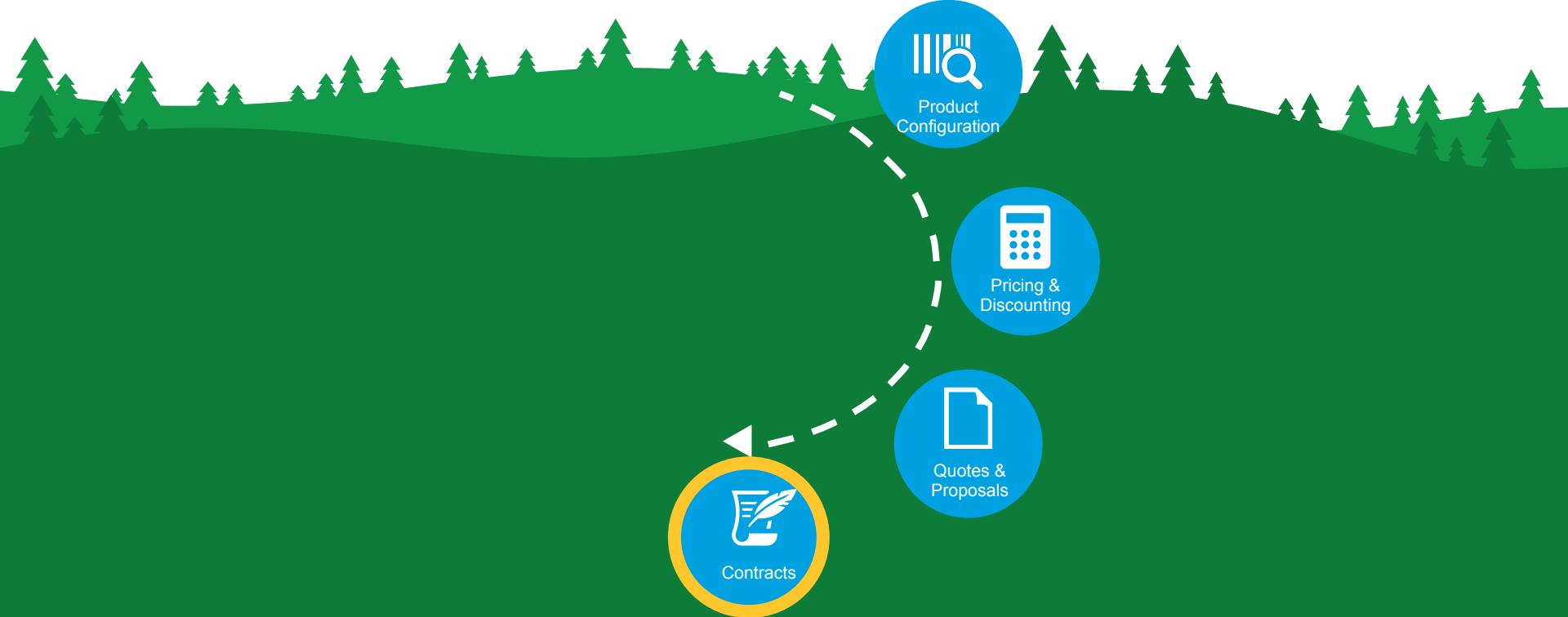


Pricing &
Discounting

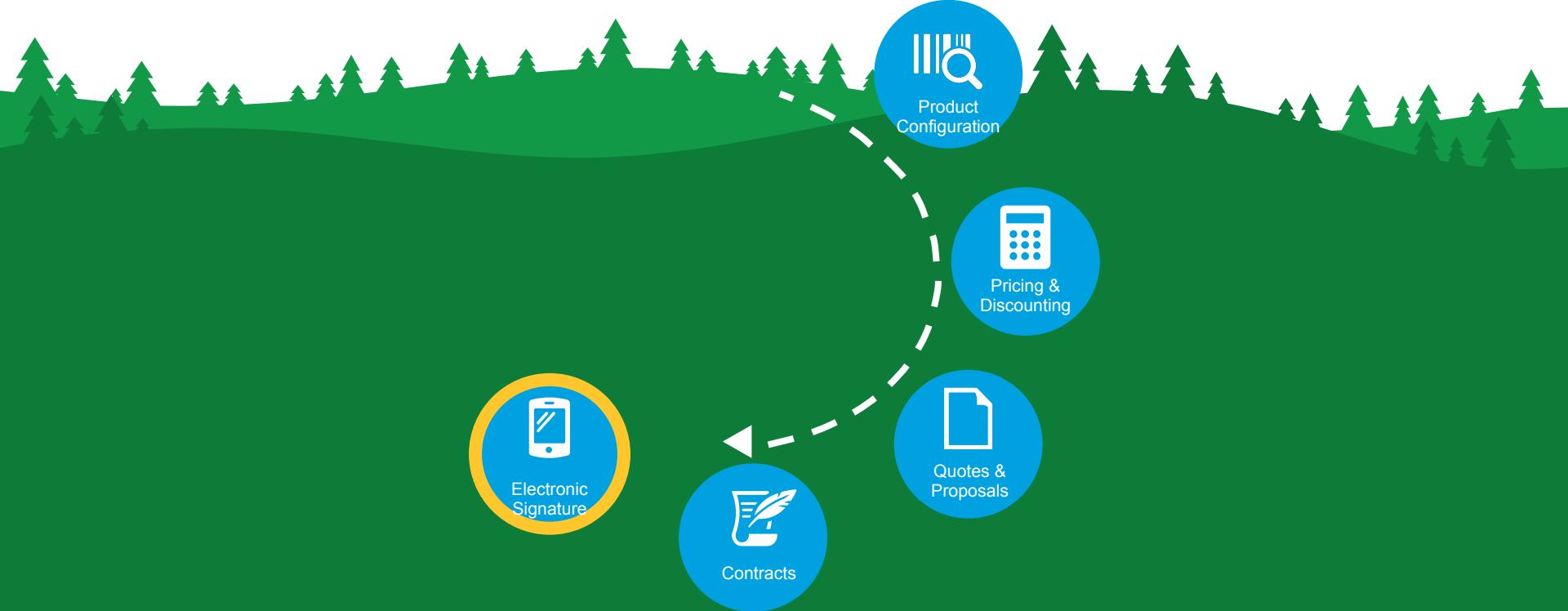


Quotes &
Proposals

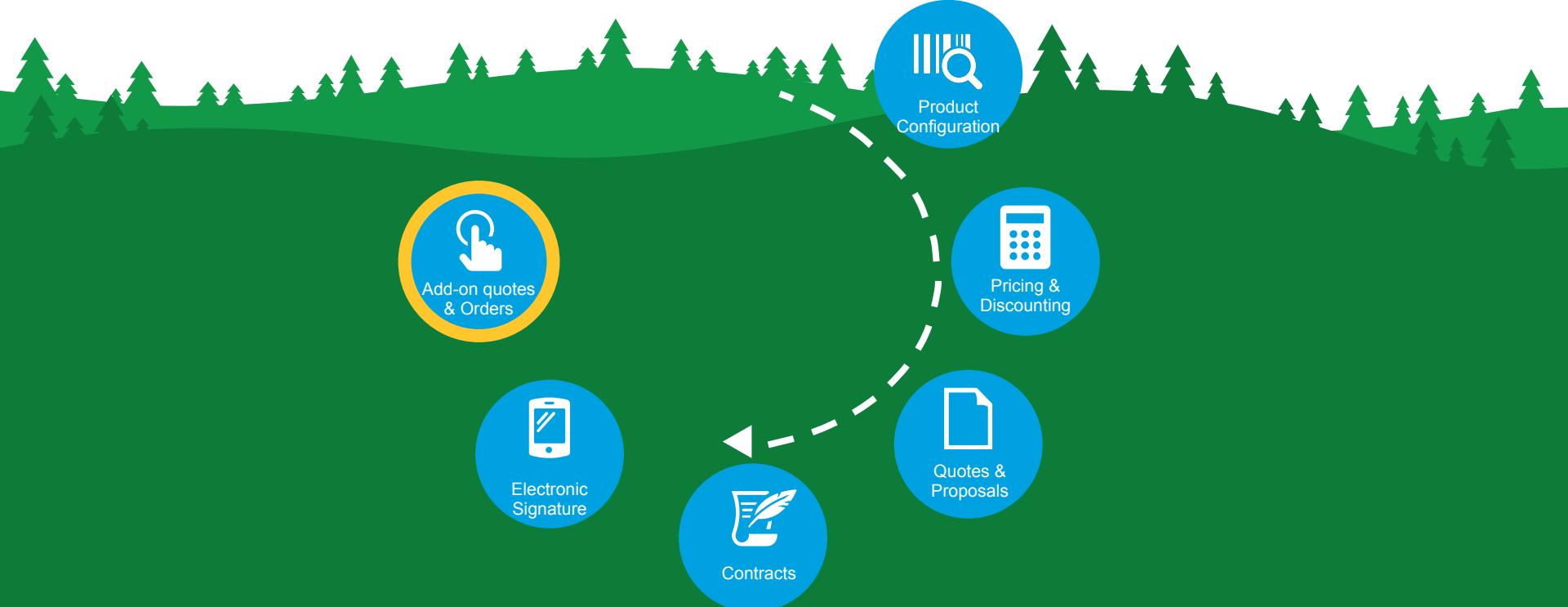
Entire Customer Sales Cycle on Single Platform



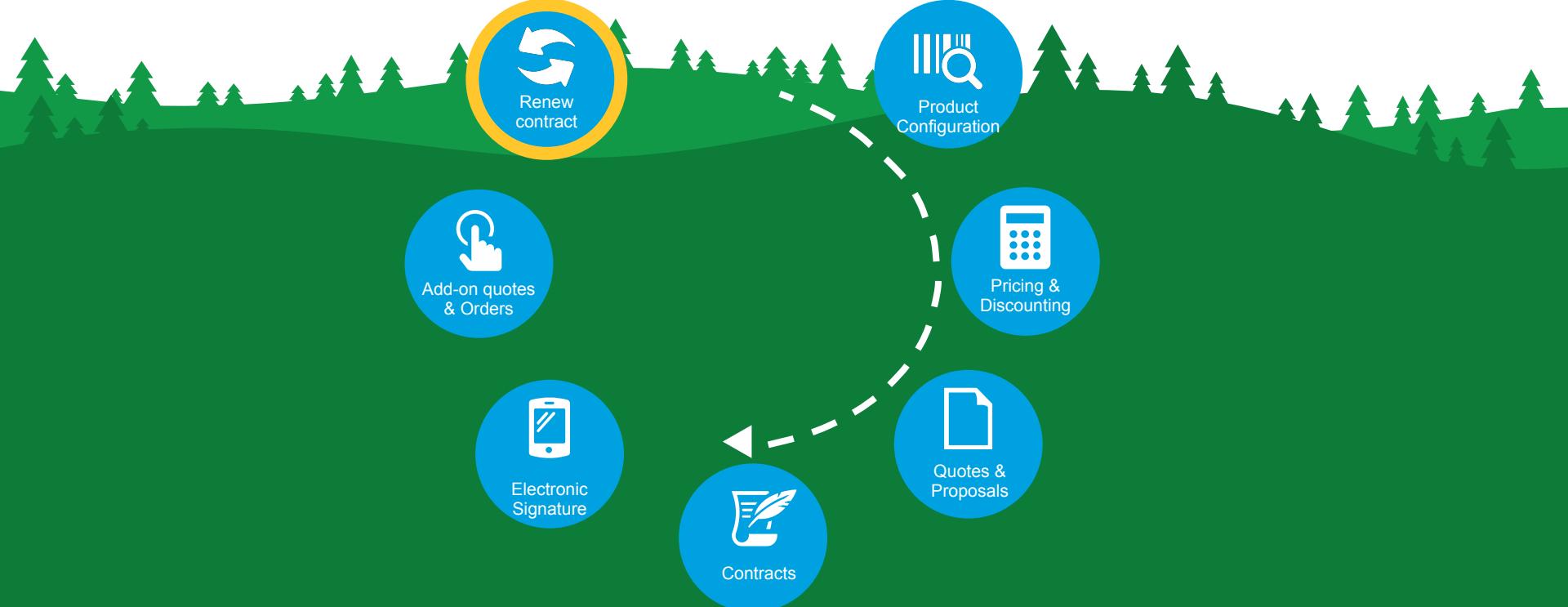
Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



Entire Customer Sales Cycle on Single Platform



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**SALESFORCE CERTIFIED CPQ
SPECIALIST**

Summer '17

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4 Focus areas of study

Products & Bundles (32%)

Pricing & Discounting (39%)

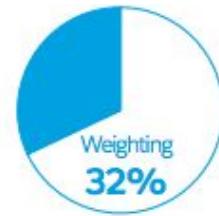
Quote Templates (15%)

CPQ Platform (15%)

Content: 60 multiple choice/multiple-select questions (2-5 unscored questions may be added)
Time allotted to complete the exam: 90 minutes (time allows for unscored questions)
Passing Score: 68%

PRODUCTS AND BUNDLES

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



Call to Action

Focus on skill & knowledge related to exam objectives



Products Setup

Key Concepts

Fixed Price Non Subscription Product Setup

- During contract creation fixed price non-subscription Products will convert to an Asset
 - Understand the differences between Asset conversion selection options (One Per Unit vs One Per Line)
- Understand CPQ Product settings that control user input and presentation
 - Quantity Editable checkbox field
 - Non Discountable checkbox field
 - Hidden checkbox field
- Related Knowledge Base Articles:
 - [Product Managed Fields](#)

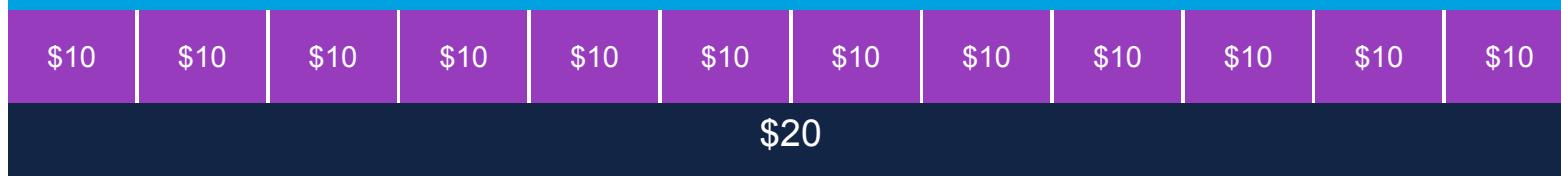
Subscription Products

Subscription Term

Product Subscription Term & Quote/Quote Line Subscription Term

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

Quote's Subscription Term = 12



= \$120

= \$20

Subscription Term & Proration

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

Quote's Subscription Term = 6

\$10 | \$10 | \$10 | \$10 | \$10 | \$10

= \$60

$\$20 \times 0.5$

= \$10

Key Concepts

Subscription Product Setup

- During contract creation, subscription Products will convert to Subscription records
- Understand product settings to set up a subscription product
 - Subscription Pricing: Fixed
 - Subscription Term (in months)
 - Understand the difference between monthly (1) and yearly (12) term settings
 - Subscription Type (Renewable or One-time)
- Related Knowledge Base Articles:
 - [Product Managed Fields](#)



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

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

Percent of Total (POT)

Subscription Fields for Percent of Total Products (POT)

Implementation Process Overview

Product Detail

Product Name: Loss and Damage Warranty Active:

Product Code: LDWARRANTY Product Family: Support

Salesforce CPQ Information

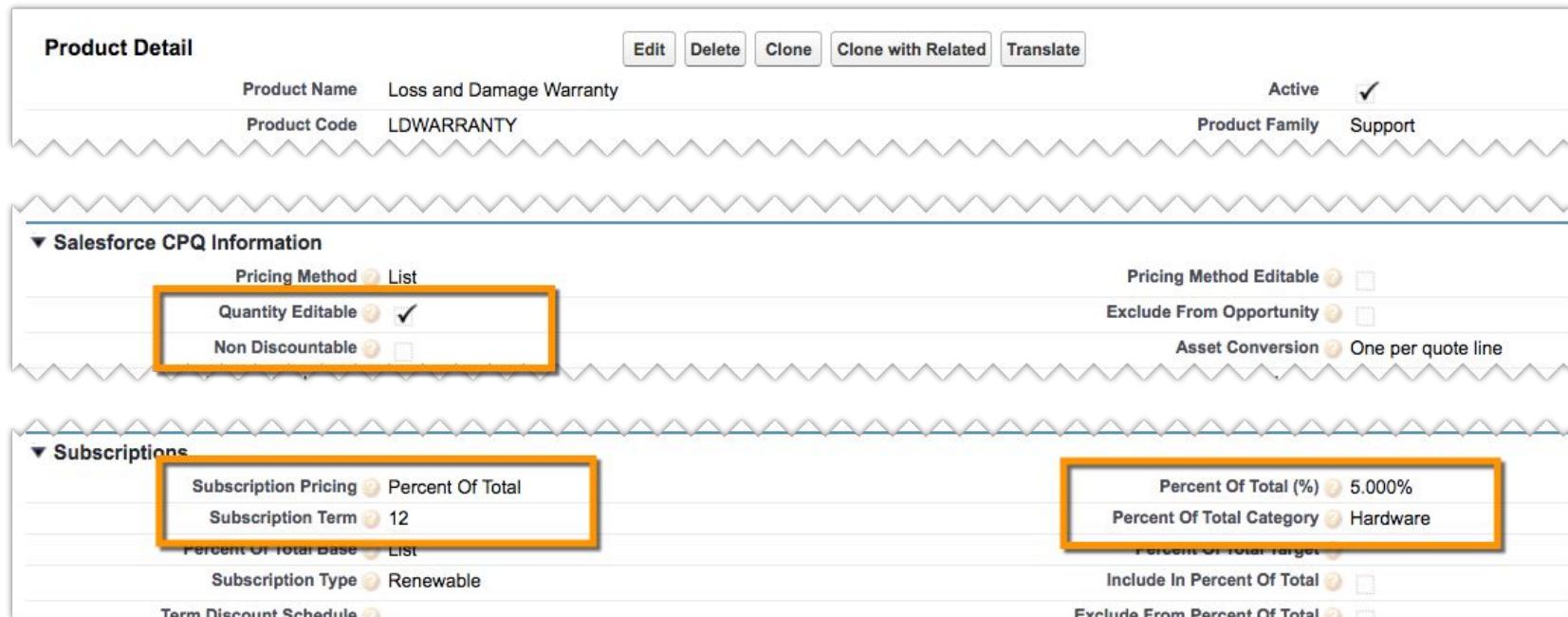
Pricing Method: List
Quantity Editable: (highlighted)
Non Discountable:

Pricing Method Editable:
Exclude From Opportunity:
Asset Conversion: One per quote line

Subscriptions

Subscription Pricing: Percent Of Total
Subscription Term: 12
Percent Of Total Base: LIST
Subscription Type: Renewable

Percent Of Total (%): 5.000%
Percent Of Total Category: Hardware
Include In Percent Of Total:
Exclude From Percent Of Total:



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

Key Concepts

Subscription Percent of Total Product Setup

- Understand the product settings to set up a percent of total subscription product
 - Subscription Pricing: Percent of Total
 - Percent of Total (%)
 - Percent of Total Category
- Related Knowledge Base Articles:
 - [Subscription Pricing](#)
 - [Percent of Total Pricing](#)

Bundles

AM

SP

15

2

AM

Configuration Event Variation Summary

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

Key Concepts

Product Bundle setup

- Understand Type/Event settings combination that prevents/allows initial configuration and reconfiguration
 - Note: also unchecking the active checkbox on “Reconfigure Line” custom action can also disable reconfiguration
- Related Knowledge Base Articles:
 - [Setting Configuration Type](#)
 - [Product Managed Fields](#)



Features

AN

ST

15

AM

Key Concepts

Feature setup

- Understand how the Number field controls feature order
- Understand how the Min/Max functions control user selection
 - Setting Max = 1 will display radio buttons instead of checkboxes
- Category setting allows for tabular organization within a feature
- Related Knowledge Base Articles:
 - [Product Features](#)
 - [Use Radio Buttons in Configuration](#)



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

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

Product Options

Option Types for MacBook Pro

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

Option Types Illustrated

Q-00012
Configure Products ▼ Cancel Save

IT Professional Pack

Location --None--

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

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

Option Types Illustrated

 Q-00012
Edit Quote

[Add Hardware](#)
[Add Products](#)
▼
[Add Group](#)
[Delete Lines](#)
↶
[Quick Save](#)
[Calculate](#)
[Cancel](#)
Save

Quote Information

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

Quote Line View
--None-- 

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

Option Types Illustrated

Q-00012
Edit Quote

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

Quote Information

Start Date 9/27/2017

Subscription Term 36

Target Customer Amount

Quote Line View --None--

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

SUBTOTAL: \$4,927.50

QUOTE TOTAL: \$4,927.50

Option Types Illustrated

Q-00012
Edit Quote

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

Quote Information

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

Quote Line View --None--

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	PACKAGE TOTAL	Actions
<input type="checkbox"/>	1	ITPROPACK	✓ IT Professional Pack	1.00	\$0.00		\$0.00	\$0.00	\$112,567.50	★ ↗ 📁 🛍
<input type="checkbox"/>	2	AP-MBPRO	✓ Apple MacBook Pro	3.00	\$1,500.00		\$1,500.00	\$4,500.00	\$4,500.00	ℹ
<input type="checkbox"/>	3	CPU22GHZI7	CPU 2.2GHz i7	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	ℹ
<input type="checkbox"/>	4	Dependent on bundle quantity, locked		3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	ℹ
<input type="checkbox"/>	5	SSD256	SSD Hard Drive 256GB	3.00	Included	Type: Component	\$0.00	\$0.00	\$0.00	ℹ
<input type="checkbox"/>	6	Independent on bundle quantity, locked		1.00	\$22.50	Type: Accessory	\$67.50	\$67.50	\$67.50	ℹ
<input type="checkbox"/>	7	M:	Independent on bundle quantity, free to edit	300.00	\$10.00	Type: Related Product	\$108,000.00	\$108,000.00	\$108,000.00	ℹ
									SUBTOTAL:	\$112,567.50
									QUOTE TOTAL:	\$112,567.50

Key Concepts

Options setup

- Understand the behaviour and differences between Option Types:
 - Component
 - Accessory
 - Related Product
- The ‘Bundled’ checkbox will show List Price as “Included” and Net Price as \$0
- The ‘Quote Line Visibility’ controls which options can show up on the Quote Document
- The ‘Apply Immediately’ will trigger rules to run after selection
- Changing Option Selection method from ‘Click’ to ‘Add’ on the bundle product collapses options and allows for an ‘Add’ link to expand



Key Concepts

Options setup (continued)

- Nested bundles: an Option's Optional SKU can reference other bundled products (ie. the MacBook Pro within the ITPROPACK bundle)
- Related Knowledge Base Articles:
 - [Product Features](#)
 - [Adding Options](#)
 - [Changing Option Selection Method](#)



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

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

Configured Code Pattern

Configured Code Pattern

Example

#	PRODUCT NAME	PACKAGE PRODUC...	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.
1	Apple MacBook Air	PAIR-1.6-8-128	1.00	USD 1,300.00	
2	CPU 1.6GHz i5		1.00	Included	
3	RAM 8GB		1.00	Included	
4	SSD Hard Drive 128GB		1.00	USD 50.00	

Configured Code Pattern

Update Product Field

Salesforce CPQ Configuration

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

Salesforce CPQ Renewals

Renewal Product
Edit Delete Clone Clone with Related

Features

Features		New Product Feature	Features Help	
Action	Feature Name	Min Options	Max Options	Number
Edit Del	<u>Processor</u>	1	1	10
Edit Del	<u>Memory</u>	1	1	20
Edit Del	<u>Storage</u>	1	1	30



Configured Code Pattern

Update Product Options for AP-MBAIR

▼ Optional SKU Information

Product Code ⓘ CPU16GHZ15	Price Editable ⓘ No
Product Name ⓘ CPU 1.6GHz i5	Product Configuration Type ⓘ
Product Description ⓘ	

▼ Advanced Settings

Component Code ⓘ 1.6	Component Code Position ⓘ 10
----------------------	------------------------------

▼ Optional SKU Information

Product Code ⓘ RAM16GB	Price Editable ⓘ No
Product Name ⓘ RAM 16GB	Product Configuration Type ⓘ
Product Description ⓘ	

▼ Advanced Settings

Component Code ⓘ 16	Component Code Position ⓘ 20
---------------------	------------------------------



Configured Code Pattern

Update Product Options for AP-MBAIR

▼ Optional SKU Information

Product Code ⓘ RAM8GB	Price Editable ⓘ No
Product Name ⓘ RAM 8GB	Product Configuration Type ⓘ
Product Description ⓘ	

▼ Advanced Settings

Component Code ⓘ 8	Component Code Position ⓘ 20
--------------------	------------------------------

▼ Optional SKU Information

Product Code ⓘ SSD128	Price Editable ⓘ No
Product Name ⓘ SSD Hard Drive 128GB	Product Configuration Type ⓘ
Product Description ⓘ	

▼ Advanced Settings

Component Code ⓘ 128	Component Code Position ⓘ 30
----------------------	------------------------------



Key Concepts

Configured Code Pattern

- Understand the required fields to set up dynamically generated skus
- Also be familiar with Package Product Description
- Related Knowledge Base Articles:
 - [Package Product Code](#)
 - [Package Product Description](#)



Option Constraints

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 Grouping Use Case

Cloud Storage should only be made available when BOTH WifiRouter AND Access Point are available

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

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



Build and Learn

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

Create First Option Constraint

Option for Cloud Storage

Information ■ = Required Information

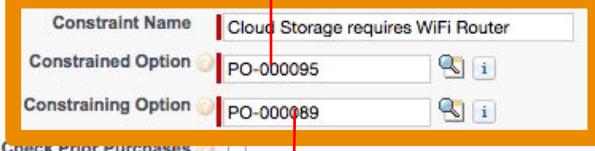
Constraint Name	Cloud Storage requires WiFi Router
Constrained Option	PO-000095
Constraining Option	PO-000089

Active

Configured SKU IT Professional Pack

Type

Option Constraint Group Cloud



Option for Router

Build and Learn

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

Create Second Option Constraint

Option for Cloud Storage

Information ■ = Required Information

Constraint Name	Cloud Storage requires WiFi Access Points
Constrained Option	PO-000095 🔍 ⓘ
Constraining Option	PO-000090 🔍 ⓘ
Check Prior Purchases <input type="checkbox"/>	

Active ☐

Configured SKU PO-000095 ✖ 🔍 ⓘ

Type ☐ Dependency ▼

Option Constraint Group Cloud ✖ 🔍 ⓘ

Option for Access Point

Key Concepts

Option Constraints

- Understand key fields to set up Option Constraints
 - Difference between Constrained and Constraining options
 - Difference between Type: Dependency and Type: Exclusion
- A common error is to forget to activate the constraint
- Understand how to set up Option Constraint Groups
 - Transforms Option Constraints logic from OR to and AND
- Understand 'Check Prior Purchases' can verify Constraining Options of past purchases
- Related Knowledge Base Articles:
 - [Adding Option Constraints](#)
 - [Check Prior Purchases & Options \(to avoid creating product rules\)](#)

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

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

Product Rules

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2

AM

Watch and Learn

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

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

- █ = User selected
- █ = Rule selected

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

The screenshot shows the 'Information' tab of a Product Rule configuration page. A legend at the top right indicates that a red vertical bar next to a field label means 'Required Information'. The form fields include:

- Product Rule Name:** Selecting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT (highlighted by an orange box)
- Conditions Met:** All (highlighted by an orange box)
- Scope:** Product (highlighted by an orange box)
- Evaluation Event:** Always (highlighted by an orange box)
- Type:** Selection (highlighted by an orange box)
- Active:** Yes (highlighted by an orange box)
- Message:** (empty text area)

Annotations on the left side of the form ask 'What data to affect' and point to the 'Product Rule Name', 'Conditions Met', 'Scope', and 'Evaluation Event' fields. A central callout box labeled 'Triggering Event' points to the 'Evaluation Event' dropdown. Annotations on the right side ask 'What does it do?' and point to the 'Type' and 'Active' fields.

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

Information ! = Required Information

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

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Error Condition

The screenshot shows the Salesforce Product Rule configuration interface. The top section, 'Information', contains fields for 'Rule' (Selecting LJ-PRINTER a), 'Tested Object' (Product Option), and 'Tested Field' (SBQQ_ProductCode_c). The bottom section, 'Filter Information', contains fields for 'Operator' (equals), 'Filter Type' (Value), and 'Filter Value' (LJ-PRINTER). Both sections have dropdown menus and search icons.

Section	Field	Value
Information	Rule	Selecting LJ-PRINTER a
	Tested Object	Product Option
	Tested Field	SBQQ_ProductCode_c
Filter Information	Operator	equals
	Filter Type	Value
	Filter Value	LJ-PRINTER
	Filter Variable	

Can test Fields,
Summary
Variables, or
Configuration
Attributes against
other data

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Create Actions — the “THEN” in a Product Rule

Information

Rule **Selecting LJ-PRINTER a**

Type **Add**

Product **LaserJet Toner Cartridge**

Required **Yes**

Relates to a Product record (Or other Product data)

Information

Rule **Selecting LJ-PRINTER a**

Type **Add**

Product **LaserJet Maintenance K**

Required **Yes**

Printer Options Product Rule

Implementation Process Overview

Create Product Rule and add Configuration Rule

- Begins rule that applies to the ITPROPACK bundle

Create Error Condition

- Makes rule fire when Product Code is LJ-PRINTER

Create Actions

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

Update Product Option

- Causes the rule to evaluate upon selecting LJ-PRINTER

Printer Options Product Rule

Implementation Process Overview

Update Product Option



Key Concepts

Product Rule Assembly Process

- Exercise 8 Printer Option Rule and Exercise 9 Toner Quantity Validation
- Understand Product Rule Detail
 - Types, Scope, Evaluation Event
- Understand Configuration Rule
 - Importance of assigning to a Product
- Understand Product Rule Error Conditions
 - Difference between Tested Object, Field and Variable vs Filter Types, Value, and Variables
 - How to incorporate the use of Summary Variables
- Understand Product Rule Actions
 - Types
 - Filter Options

Key Concepts

Product Rule Assembly Process (continued)

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



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

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

Configuration Attributes

Watch and Learn

Location Configuration Attribute

Q-00012

Configure Products

Filter ▾

Printing

Location	QL... CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> United States	1.00	LJ-PRINTER	LaserJet Printer	\$275.00
<input type="checkbox"/> United Kingdom	1.00	LJ-TONER	LaserJet Toner Cartridge	\$125.00
<input type="checkbox"/> --None--	1.00	LJ-MAINTKIT	LaserJet Maintenance Kit	\$20.00
<input type="checkbox"/> --None--	1.00	LJ-PAPERLETTER	LaserJet Paper Letter	\$10.00
<input type="checkbox"/> --None--	1.00	LJ-PAPERA4	LaserJet Paper A4	\$10.00

Create Config Attribute

Implementation Process Overview

Create Product Option picklist fields

- Make a Location field available for use in any bundle

Create Config Attributes

- Makes Location__c picklist visible on the IT PRO PACK bundle

Create Quote Line picklist fields

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

Automapping

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Automapping

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

The screenshot shows the 'Configure Products' interface in Salesforce. At the top, there is a toolbar with a wrench icon, the identifier 'Q-00012', and two downward-pointing arrows. Below the toolbar, the title 'Printing' is displayed. A dropdown menu is open over a column labeled 'Location'. The menu options are '--None--', 'United States', and 'United Kingdom'. The table below lists four products: 'LJ-PRINTER', 'LJ-TONER', 'LJ-MAINTKIT', and 'LJ-PAPERLETTER'. To the right of each product name, there is a blue link labeled 'Location__c'. The 'UNIT PRICE' column contains values '\$275.00', '\$125.00', '\$20.00', and '\$10.00' respectively. Dashed blue boxes highlight the 'Location__c' links and the unit price column.

QL...	CODE	PRODUCT NAME	Location__c	UNIT PRICE
<input type="checkbox"/>	1.00	LJ-PRINTER	Location__c	\$275.00
<input type="checkbox"/>	1.00	LJ-TONER	Location__c	\$125.00
<input type="checkbox"/>	1.00	LJ-MAINTKIT	Location__c	\$20.00
<input type="checkbox"/>	1.00	LJ-PAPERLETTER	Location__c	\$10.00

Automapping

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

The screenshot shows the 'Configure Products' interface for a quote line. The quote header is Q-00012. The location is set to 'United States'. The quote line table has columns: QUANTITY, PRODUCT CODE, PRODUCT NAME, Location__c, and UNIT PRICE. The table contains four rows:

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

A large blue arrow points from the 'Location' dropdown in the header to the 'Location__c' column in the table, highlighting the mapping process.

Automapping

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

Q-00012
Configure Products

Cancel Save

Printing

Location United States ▾

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

Q-00012
Edit Quote

#	PRODUCT NAME	QUANTITY	Location_c
1	IT Professional Pack	1.00	
2	Apple MacBook Pro	1.00	
3	CPU 2.2GHz i7	1.00	
4	RAM 8GB	1.00	
5	SSD Hard Drive 256GB	1.00	
6	LaserJet Paper Letter	1.00	United States

AUTOMAPPING

Key Concepts

Configuration Attribute Assembly Process

- 3 step process
 - Create Product Option picklist
 - Create Configuration Attribute
 - Understand how to position with or without of a Feature
 - Create Quote Line picklist
- Understand the concept of Automapping
 - Configuration Attributes with same API name can be repurposed across other bundled products
- Related Knowledge Base Articles:
 - [Configuration Attributes](#)
 - [Configuration Attribute Layouts](#)
 - [Auto-Mapping: Twin Fields](#)

Key Concepts

Product Rule with Configuration Attribute

- Importance of setting ‘Apply Immediately’ to trigger action
- Product rule Error Condition
 - Nested IFs need creation of separate rules (ie. for locations JP or BR Ex 11 & 12)
 - Every action has a reaction (ie. hiding will require unhiding if condition is reverted)
- Understand how Filter Fields can be used in the Product Action
- Understand how to use of formula fields in a Product Rule
- Related Knowledge Base Articles:
 - [Product Actions](#)
 - [Configuration Attributes](#)
 - [Configuration Selection Rules](#)
 - [Hiding Options in Configurator](#)

Q: The CPQ Admin creates Product Option and Quote Line fields to store the values of a Configuration Attribute on Product A bundle. The CPQ Admin now needs an identical Configuration Attribute for new Product Bundle Z. Which tasks should the CPQ Admin complete to meet this business requirement?

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

Guided Selling

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Watch and Learn

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

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

Guided Selling

Implementation Process Overview

Create Product fields

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

Update Product fields

- Sets values for the new fields in IT pack products

Create Process Input fields

- Makes mirror fields to store values selected during guide selling

Create Quote Process and Process Inputs

- Links new product fields with guided selling prompts



Guided Selling

Implementation Process Overview Continued



Create Process Input Conditions

- Allows for dynamic display of guided selling input fields

Key Concepts

Guided Selling

- The ideal implementation scenario for Guided Selling is if you have to ask multiple general questions
- Do Exercise 20
- Understand the Guided Selling assembly process
 - Create Product fields
 - Update the Products
 - Create twin Process Input fields (automapping)
 - Create Quote Process and Process Inputs
 - Create Input Conditions
 - Remember to paste Quote Process ID to field on the Quote
- Related Knowledge Base Articles:
 - [Guided Selling Use Case](#)
 - [Building Workflow to Map Quote Process](#)

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

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

Custom Actions

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Key Concepts

Custom Actions and Search Filters

- Do Exercise 17: Dynamic Custom Actions
- Great implementation tactic to quickly show a subset of products
- Custom Actions assembly process
 - Hidden checkbox prevents field from showing on UI
- Be aware that
 - Custom Actions can be dynamic
 - Search Filters can conditional
- Related Knowledge Base Articles:
 - [Custom Actions](#)
 - [Search Filters](#)

PRICING AND DISCOUNTS

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



Call to Action

Focus on skill & knowledge
related to exam objectives



Pricing Waterfall

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Pricing Structure

Standard Item
Subscription Item

Extended Price = Unit x Quantity
Extended Price = Unit x Quantity x Prorated Term

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

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

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

List Price \$50

Quantity 13

Default Subscription Term 6

Distributor Discount -5%

Partner Discount 50%

Additional Discount 10%

Discount Schedule 10%

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

Pricing Structure

Original Price		\$50.00
List Price	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

Discount Schedules

Discount Schedule Variations

Type – Range vs Slab



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

10 units

\$11.76 total



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

10 units

\$11.96 total

Key Concepts

Discount Schedule

- Understand what can Discount Schedules be attached to and trump order (hierarchy):
 - Contracted Price (Account)
 - Product Option
 - Product Feature
 - Product
- Understand the Assembly process setup options
 - Type, Discount Unit, Aggregation Scope, Override Behavior picklist
 - Cross Products/Cross Orders checkboxes
- Understand Slab vs Range Discount calculations
- Lower bound is inclusive, Upper bound is exclusive
- Slab is not compatible with Cross Products
- Related Knowledge Base Articles:
 - [Discount Methods: Discount Schedule Overview](#)
 - [User Defined Discount Schedules](#)

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

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

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

- A. \$175.00
- B. \$190.00
- C. \$200.00
- D. \$225.00



Pricing Methods

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Subscriptions

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Key Concepts

Subscription Pricing

- The Prorate Precision setting options are found in Package Settings
 - Day
 - Month
 - Monthly+Day
- Calculate Regular Price of Subscription product with discount schedules
- Related Knowledge Base Articles:
 - [Overview of Product Pricing](#)
 - [Subscription Prorate Precision](#)



Percent of Total (POT)

Key Concepts

POT

- Understand how POT products are set up
 - For Subscriptions > Pricing Method: List and Subscription Pricing: Percent of Total
 - For Assets > Pricing Method: Percent of Total and Subscription Pricing: NULL and
 - Appear as \$0 on Renewal Quote
 - Subscription Term
 - Percent of Total Base
 - Percent of Total Scope
 - Percent of Total Category
 - For Assets > Pricing Method: Percent of Total and Subscription Pricing: NULL and
 - For Subscriptions > Pricing Method: List and Subscription Pricing: Percent of Total do the same thing
- Importance of assigning POT Category on associated products
- Related Knowledge Base Articles:
 - [Percent of Total Pricing](#)
 - [Percent of Total Calculations of Parent Bundles](#)

Q: A CPQ Admin wants to set up a product which must be priced as 10% of the total of all other fixed-priced products present on a quote. Which two represent a valid configuration to meet this requirement?

- A. Pricing Method set to Percent of Total and Subscription Pricing blank
- B. Pricing Method set to List and Subscription Pricing set to Percent of Total
- C. Pricing Method set to Percent of Total and Subscription Pricing set to Custom
- D. Pricing Method set to Custom and Subscription Pricing set to Custom

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
 - Contract Prices (Customer-Specific Price)

Cost and Margin

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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

Key Concepts

Cost and Margin

- Best used when Sales User needs the ability to mark-up from cost
 - Pricing Method set to Cost
 - Cost is a related list entry on the Product
 - Markup is entered by Sales User on Quote Line UI
-
- Related Knowledge Base Articles:
 - [Cost and Markup Pricing](#)



Block Pricing

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Watch and Learn

Block Pricing for Toner Recycling Product

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

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

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

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

Block Pricing with Discount Schedule

Block Pricing + Discount Schedule

An Alternative to Overage Rate

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

Quantity	Block Price	Discount Schedule	Overage based on Discount * List Price	Price
1 – 10 Units	\$1000.00			\$1000
11 – 20 Units	\$1500.00			\$1500
21 – 30 Units		52%	52% of \$125 = \$60	1500 + 60/unit
31 + Units		56%	56% of \$125 = \$55	\$2100 + 55/unit

Key Concepts

Block Pricing

- Block pricing is set pricing directly on the product
- Using Overage vs Discount Schedules
- Related Knowledge Base Articles:
 - [Block Pricing](#)
 - [Combine Block Pricing with Discount Schedules](#)
 - [Discount Methods: Discount Schedules Overview](#)



Q: The CPQ Admin has the following monthly subscription service with tiered pricing:

Total Price \$1000 for the first 100 units
\$1,000 plus \$9 per unit above 100
\$4,600 plus \$8 per unit above 500
\$8,600 plus \$7 per unit above 1,000

Which two pricing configurations meet these requirements?

- A. List pricing with slab discount schedule
- B. List pricing with lookup price rule
- C. Block pricing with overage
- D. Block pricing with range discount schedule
- E. Block pricing with slab discount schedule



Multi Dimensional Quoting

Multi Dimensional Quoting Use Case

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

Multi Dimensional Quoting

Implementation Process Overview

Create Price Dimensions

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

Key Concepts

MDQ

- Understand the MDQ assembly process
 - Provide Dimension Name
 - Select Type: time-based (Year, Quarter, Month, Custom) vs One-Time
 - Cannot create One-time dimension without first creating a time-based dimension
- MDQ Type: Custom allows for users to define their own time periods provided its consecutive
 - Unless package setting > 'Allow non-consecutive custom segments' is checked
 - Understand what the 'First Segment Term End Date' does with odd terms
- Uplift can be removed from Segmented Line Editor field set if not needed
- Default Pricing Table field determines if the MDQ product is display in standard or segmented view on the QLE



Key Concepts

MDQ (continued)

- Price rules can be applied to MDQ by accessing Quote Line fields (ie. Segment Index)
- Related Knowledge Base Articles:
 - [Multi-Dimensional Quoting \(MDQ\)](#)
 - [Making MDQ Products Appear in the Standard Table by Default](#)
 - [Configure SteelBrick CPQ Package-Level Settings](#)
 - [Quote-Line-Managed Fields](#)



Q: The CPQ admin does not need the ability for a user to perform escalator or ramp calculations in multi-dimensional quotes, what actions should he take to fulfill this requirement

- A. Remove the Uplift field from the Segmented Line Editor field set.
- B. Select the Allow Non-Consecutive Custom Segments checkbox on the Price Dimension object.
- C. Disable the escalator checkbox
- D. Hide the Quantity Editable pick list

Contract Pricing

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Key Concepts

Contract Pricing

- Understand the Contract Pricing assembly process
 - Effective/Expiration Date
 - Discount
 - Product
 - Discount Schedules can be assigned (highest precedent)
- Inheritance options for Parent/Child accounts
- Note: ‘Generate Contracted Price’ will auto-generate a contracted price when the Opportunity is Contracted

- Related Knowledge Base Articles:
 - [Contract Pricing](#)
 - [Auto-Generating a Contracted Price](#)
 - [Ignore Parent Contracted Pricing](#)

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

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

Pricing Rules

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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

Key Concepts

Pricing Rule

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



Key Concepts

Pricing Rule (continued)

- Summary Variable assembly process
 - Composite Information (ie. WiFi Access Point)
- Related Knowledge Base Articles:
 - [Price Rules](#)
 - [Adding Summary Variables](#)
 - [Real-Time Price Rules in Configuration](#)
 - [Writing Advanced Calculator Compatible Formulas](#)
 - [Original Price - MSRP Pricing](#)



Q: A CPQ Admin wants to apply different Discount Schedules depending on the currency of the Quote. How should the CPQ Admin set this up?

- A. Create a Discount Schedule for each currency in the related list on the Product.
- B. Use a Price Rule to inject the ID of the Discount Schedule sourced from a formula field on the Quote Line.
- C. Create a Lookup Relationship on the Quote to the Discount Schedule for the user to populate.
- D. Modify the Discount Schedule formula field on the Quote Line to reference the IDs of your Discount Schedules.



Creating a Lookup Object

Lookup Object

Implementation Process Overview

Create Object

- Used to store partner level discount data for later lookup

Create Object fields

- Provides columns for discount data, such as Partner Level

Create Object records

- Populates the 'data table' with unique records

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

Key Concepts

Pricing Rule (continued)

- Exercise 31
- Understand the Pricing Rule capabilities to support Lookup Objects
 - Lookup Object and Lookup Field fields
 - Tested Field and Target Field on the Price Action
- Related Knowledge Base Articles:
 - [Price Rules](#)
 - [Lookup Object / Table](#)



QUOTE TEMPLATES

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



Call to Action

Focus on skill & knowledge related to exam objectives



Quote Templates

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Key Concepts

Quote Template

- Understand how to add an attachment to the document generation
- Understand when it's appropriate to check the "Watermark Shown" quote field
- Related Knowledge Base Articles:
 - [Generate Documents](#)
 - [Draft Watermark Added to Quote PDF](#)



Template Sections

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Key Concepts

Quote Template (continued)

- Exercise 40
- Understand the Template Section assembly process
 - Roll-up field settings
 - Show All Package Products
 - Show Bundled Products
 - Hide Component Products
 - Group defining capabilities
- Understand the Template Content assembly process
- Related Knowledge Base Articles:
 - [Create Template Sections](#)
 - [Create Template Content](#)

Q: When multiple products exist on different quote lines on the same quote the CPQ Admin would like to combine these to show as one line in the Quote Document. What would need to be done to the Quote Template to meet this requirement?

- A. Set the Roll-up field to be Product
- B. Show Bundled Products
- C. Disable the Subgroup Field
- D. Hide Component Products

Line Item Section

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Key Concepts

Quote Template (continued)

- Understand how to conditionally display Line Columns and Sections
 - Conditional Print Field
- Related Knowledge Base Articles:
 - [Dynamically Displaying Quote Line Columns](#)



Quote Terms

AM

AM

Quote Terms Section

Implementation Process Overview

Create Template Content

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



Create Template Sections

- Places Terms Header and Terms content after subtotals

Key Concepts

Quote Terms

- Understand Quote Term assembly process
 - Create Quote Term Template Content then create new Template Section
- Understand how to make Quote Terms conditional
 - Quote Term > Term Condition > Tested Field
- Related Knowledge Base Articles:
 - [Creating Template Sections](#)
 - [Creating Quote Term Template Content](#)
 - [Multiple Quote Term Sections](#)
 - [Building Quote Term Conditions](#)
 - [Creating Standard Terms](#)
 - [Lock Quote Term from Edits](#)

Q: The CPQ Admin wants to prevent a Quote Term from being edited by non admin users? What should the CPQ Admin do to meet this requirement?

- A. On the User Profile, make the object Read-Only.
- B. Quote Term are non editable by default
- C. On the Quote Term object, make the object Read-Only.
- D. On the Quote Term record, check the Locked checkbox.

Quote Template Debugging

Template Troubleshooting Process

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

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

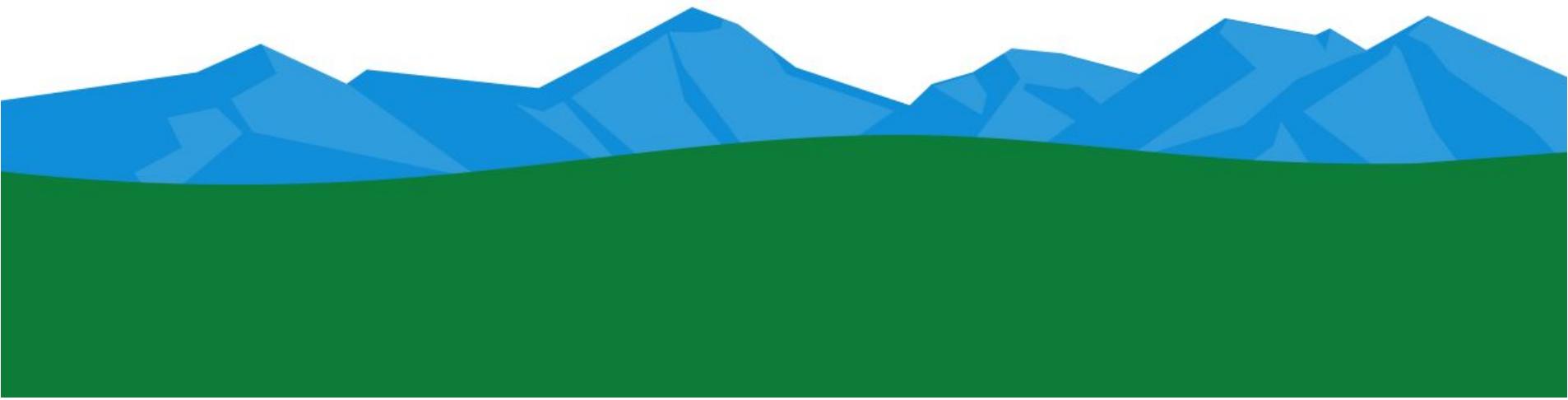
.....continue this process until the document renders, then address the problematic section.



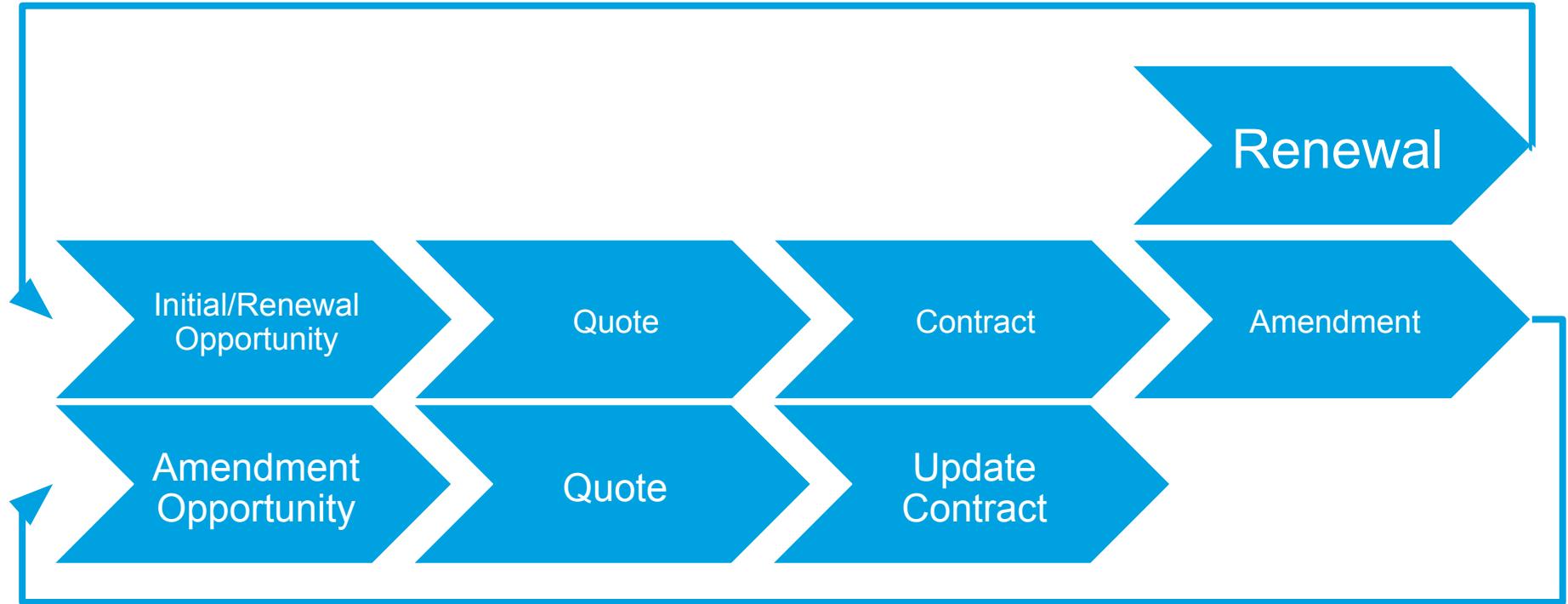
Troubleshooting

Quote Templates

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



Contracts and Renewals



Data Flow

Simplified



Auto-Mapping Concerns

Contracting End-to-End



Create a Contract and Renewal Opportunity

Implementation Process Overview

Create Opportunity and Quote

- Starts a typical sales cycle, assembles quote with subscriptions

Update Opportunity

- Marks opportunity as Contracted, generating contract

Activate Contract

- Makes contract available for co-termination

Update Contract

- Generates a new opportunity for renewal

Create Amendment Opportunity and Quote

Implementation Process Overview

Amend Contract

- Automatically generates new opportunity and quote

Update Quote

- Adjusts products and values to desired quantities

Update Opportunity

- Marks opportunity as Contracted, updating existing contract

Create a Renewal Quote

Implementation Process Overview

Update Contract

- Marks contract as Renewal Quoted, generating a quote

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

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

CPQ PLATFORM

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



Call to Action

Focus on skill & knowledge related to exam objectives



Key Concepts

CPQ Platform > Contracting

- Understand the Contracting operating process
 - What creates a Subscription vs Asset record
 - Best practice:
 - Generate Renewal Opportunity after contracted
 - Generate Renewal Quote start date one day after the contract end date
 - Importance of preserving bundle structure for renewals
- Related Knowledge Base Articles:
 - [Contracting Overview](#)
 - [Asset Amendments](#)
 - [Renewal Overview](#)
 - [Preserve Bundle Structure on Renewals](#)



Key Concepts

CPQ Platform > Automapping

- Typical automapping use case
 - Product > Quote Line
 - custom Asset and Subscription fields for Renewals
- Understand the Configuration Attribute assembly process
 - Must create twin field on Subscription/Assets in order to reconfigure on renewal quotes
- Related Knowledge Base Articles:
 - [Auto-Mapping Twin Fields](#)



Key Concepts

CPQ Platform > Debugging

- Common reasons why
 - Quote Lines don't write back to the Opportunity
 - No Pricebook Entry on the Products
 - "Exclude from Opportunity" is marked on the Product record
 - \$0 products don't transfer
 - Product Options don't appear
 - No Pricebook Entry on the Products
 - Contract is not generated
 - Primary quote, Start Date or no subscription product present on the quote
- All Else: Check the Active checkbox!
 - ie. Quote Process, Quote Terms, Products, etc
- Related Knowledge Base Articles:
 - [Opportunity Product Troubleshooting](#)
 - [Adding Options](#)
 - [Contracts Overview](#)

Key Concepts

CPQ Platform > Miscellaneous

- Localization
 - Package supports all Salesforce Fully Supported Languages
- Understand how to adding fields to the Quote Line Editor
 - Setup > Create > Objects > Quote and Quote Lines > Field Sets and Page Layouts
- Related Knowledge Base Articles:
 - [Localization with SteelBrick Translation Overview](#)
 - [Quote Line Editor Overview](#)



thank you

Family Reunion



APPENDIX



Advanced Approvals (SBAA)

SBAA Features

- Independent Approval chains occurring in parallel
 - Multiple approval process can be taking place at the same time as opposed to in series
- Smart Approvals
 - Retains certain approvals after recall
- Dynamic Assignment of the Approvers in the Process
 - Don't have to specify a named user, you can use a user or profile as a reference



SBAA Illustration

▼ Approval Step 1

Product Team
 Product Manager
Product Approval Step 1

Sales
 Sales Manager 2
Approval Discount > 10%

Finance
 Finance 1
Irregular Payment Terms

▼ Approval Step 2

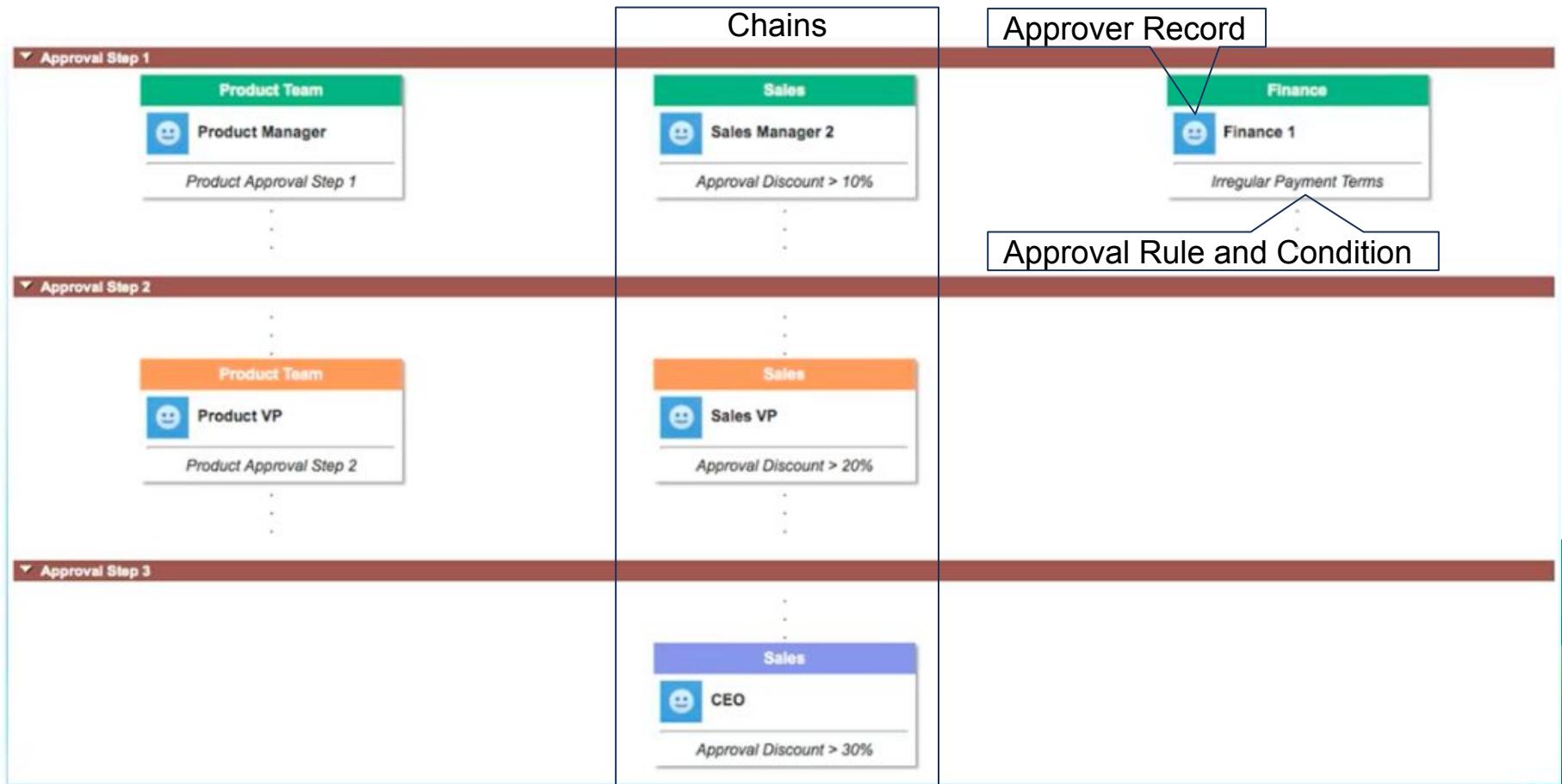
Product Team
 Product VP
Product Approval Step 2

Sales
 Sales VP
Approval Discount > 20%

▼ Approval Step 3

Sales
 CEO
Approval Discount > 30%

SBAA Illustration



Advanced Approvals (SBAA)

Implementation Process Overview

Create Approver

- Establishes existing user as an approver in the process

Create Chain

- Defines independent path of serial approvals

Create Approval Rule and Condition

- Identify which approver acts in a step of the chain, and when

Set up

Create Approver

Information |= Required Information

Approver Name <input type="text" value="Finance 1"/>	User <input type="text" value="Finance 1"/> 	Owner <input type="text" value="Brian Cloutier"/>
Next Approver <input type="text"/> 	Group ID <input type="text"/> 	Unanimous <input checked="" type="checkbox"/>

Create Chain

Information |= Required Information

Chain Name <input type="text" value="Finance"/>	Owner <input type="text" value="Brian Cloutier"/>
Target Object <input type="text" value="SBQQ_Quote_c"/> 	

Create Approval Rule

Determines who it goes to and what emails they get

Create Approval Rule

Basic Settings |= Required Information

Rule Name: <input type="text" value="Irregular Payment Terms"/>	Target Object: <input type="text" value="SBQQ__Quote__c"/>	Approval Step: <input type="text" value="1"/>	Active: <input checked="" type="checkbox"/>
		Approver: <input type="text" value="Finance 1"/>	Approval Chain: <input type="text" value="Finance"/>

Conditions

Conditions Met: <input type="text" value="All"/>	Advanced Condition: <input type="text"/>
--	--

Email Notifications

Request Template: <input type="text" value="Quote Approval Request Template"/>	Recall Template: <input type="text" value="Quote Recalled Template"/>	Approval Template: <input type="text" value="Quote Approved Template"/>	Rejection Template: <input type="text" value="Quote Rejected Template"/>
--	---	---	--

Approval Recipients

Available: Record Owner Record Created By Initial Submitter		Chosen:
---	--	---------

Rejection Recipients

Available: Record Owner Record Created By Initial Submitter		Chosen:
---	--	---------

Create Approval Condition

Determines when to send the notification

Create Approval Condition

Information ! = Required Information

Enable Smart Approval

Approval Rule Irregular Payment Terms 

Tested Information

Tested Field SBQQ_PaymentTerms__c 

Tested Variable 

Filtered Information

Operator not equals 

Filter Type Value 

Filter Field --None-- 

Filter Value Net 30 

Filter Variable 



CPQ & Billing



Configure-Price-Quote (CPQ)



START



Sales

Configure-Price-Quote (CPQ)



Create
Opportunity



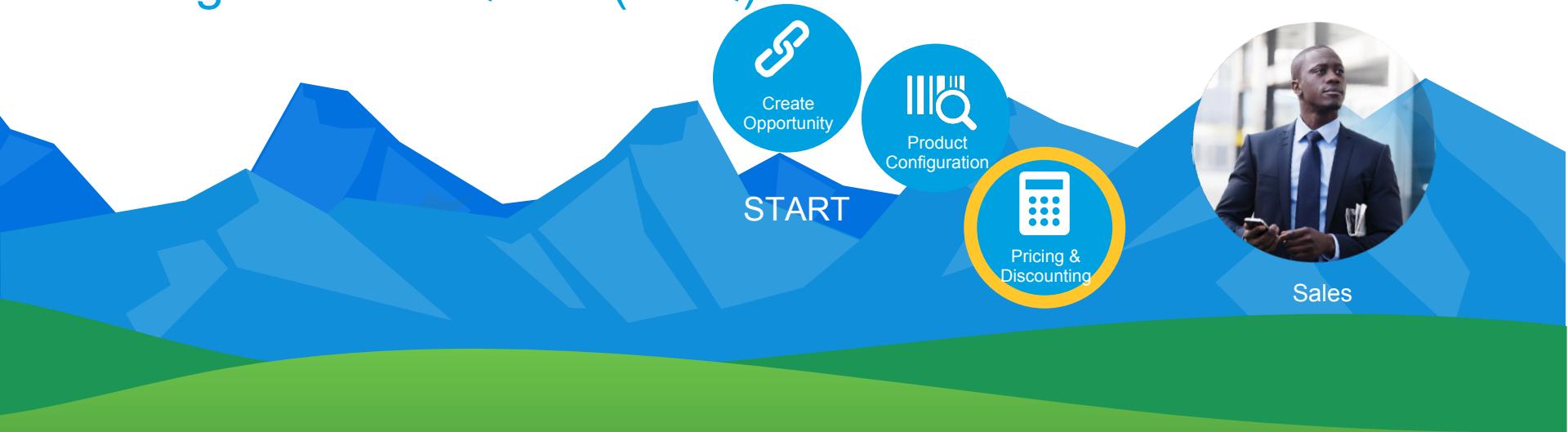
Product
Configuration

START



Sales

Configure-Price-Quote (CPQ)



Configure-Price-Quote (CPQ)

START



Sales

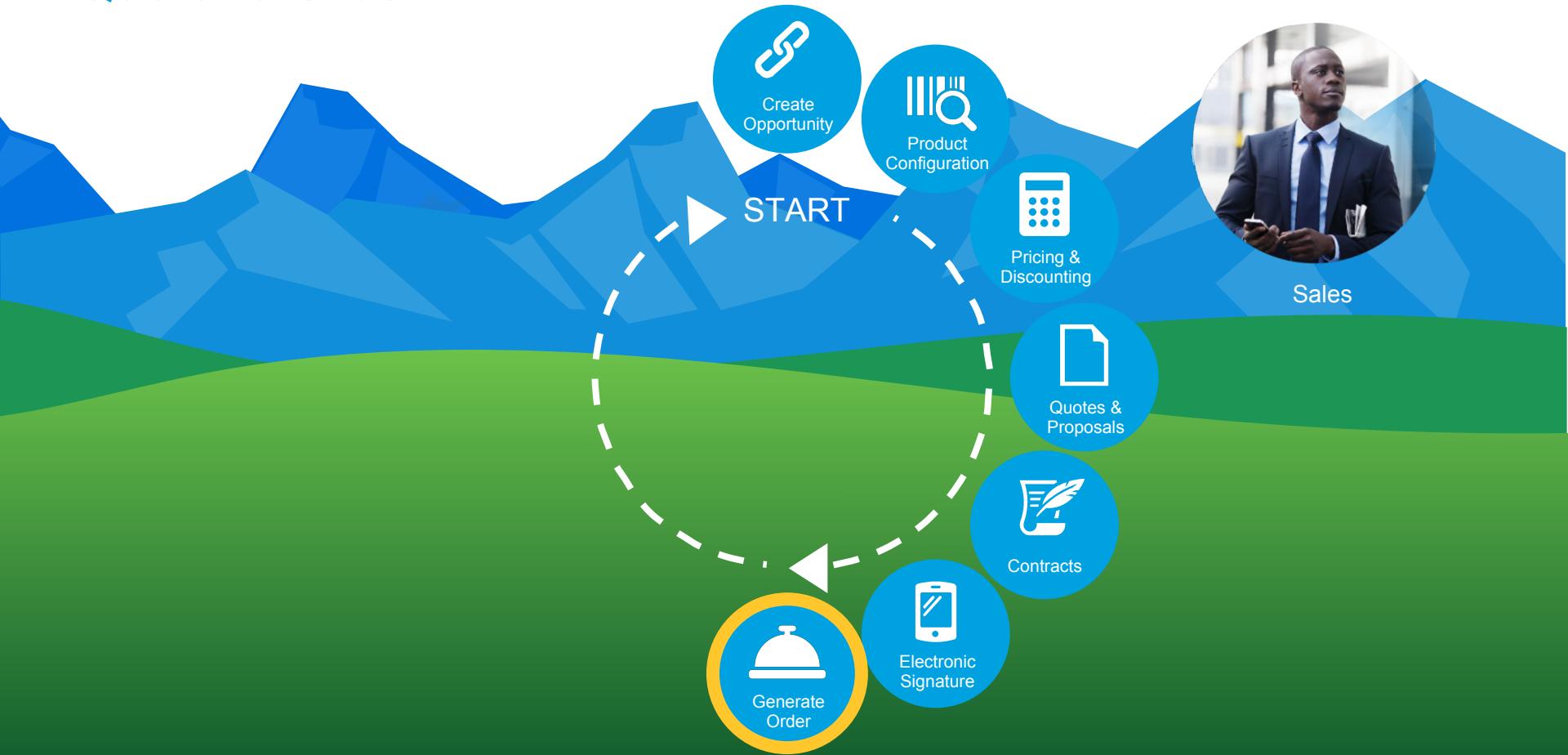
Configure-Price-Quote (CPQ)



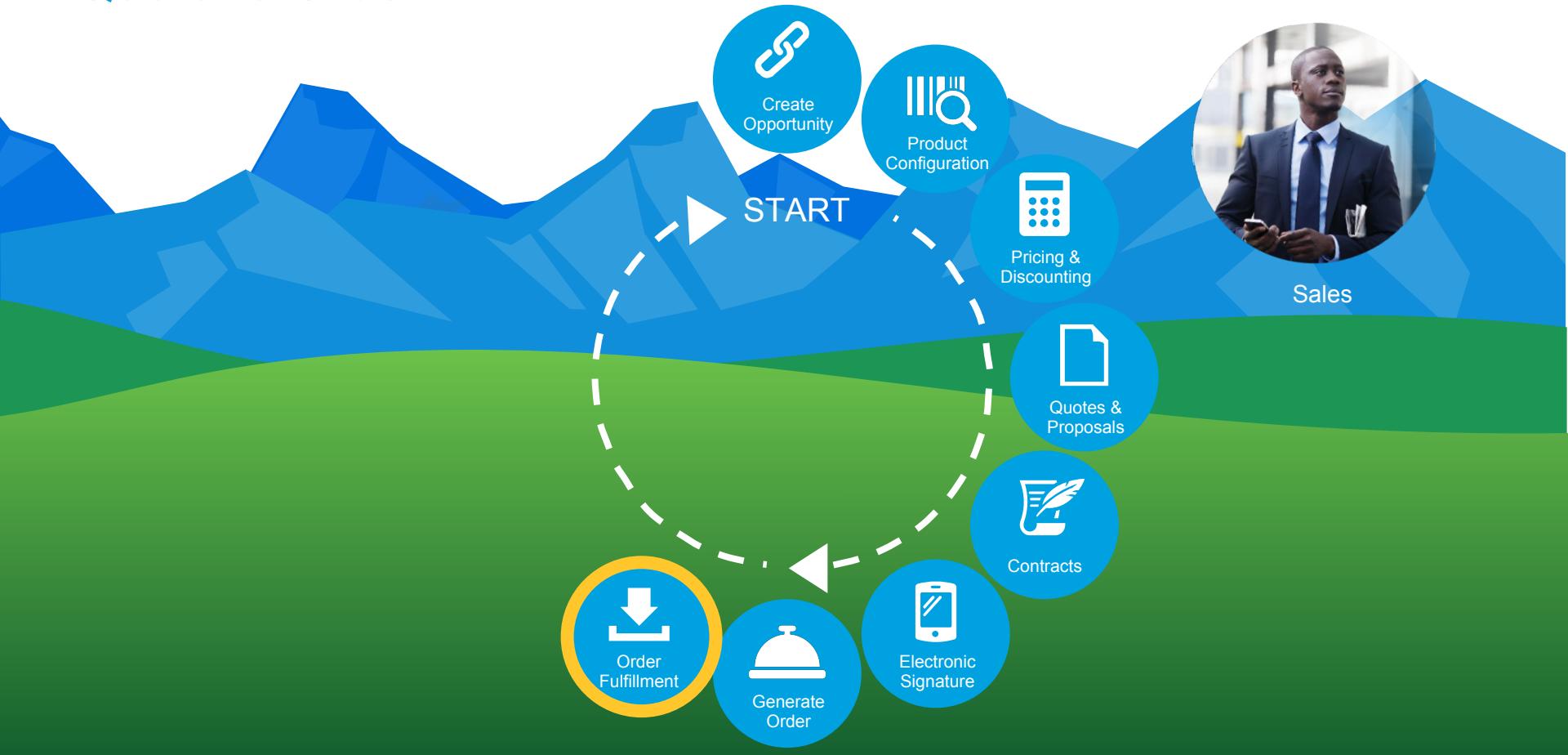
Configure-Price-Quote (CPQ)



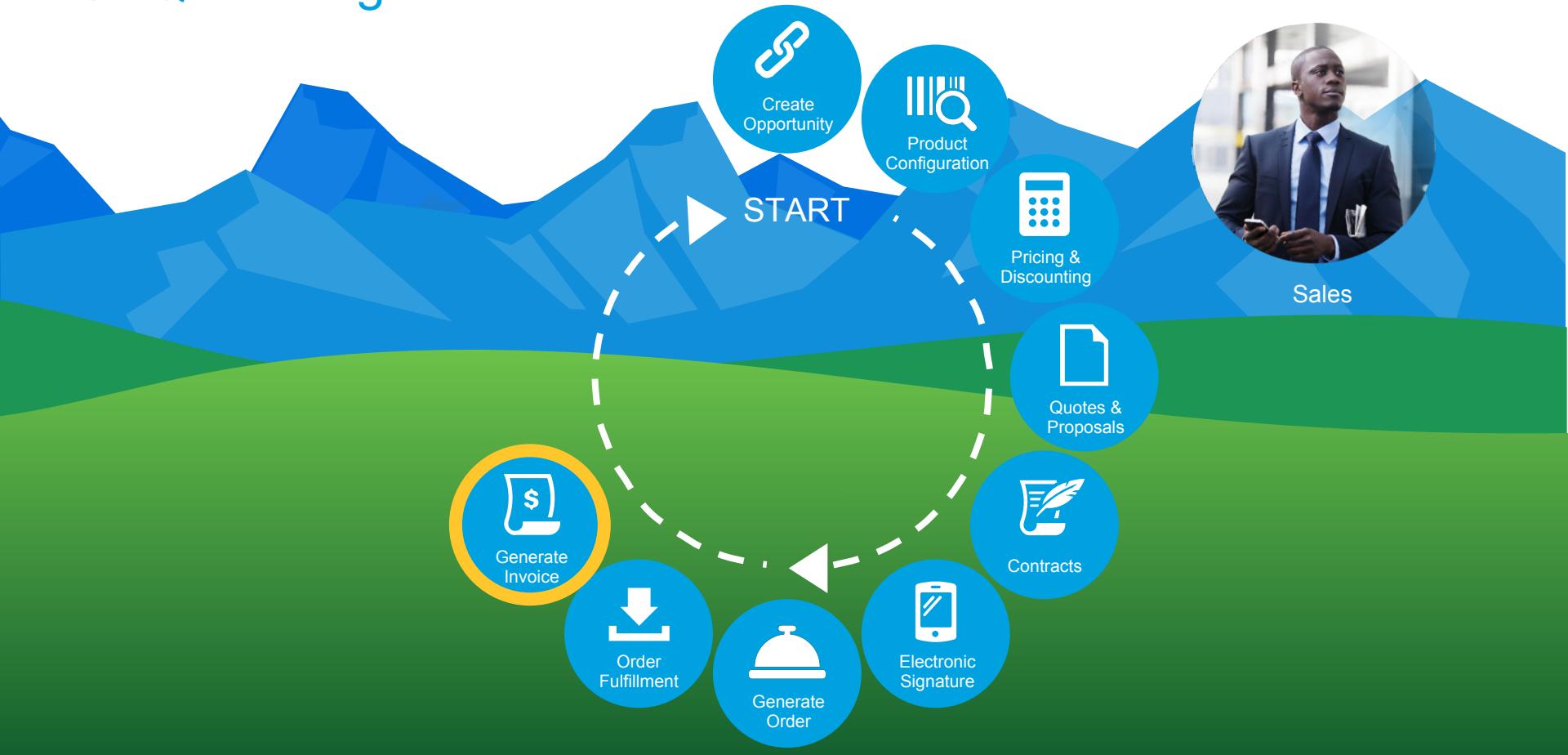
Quote to Order



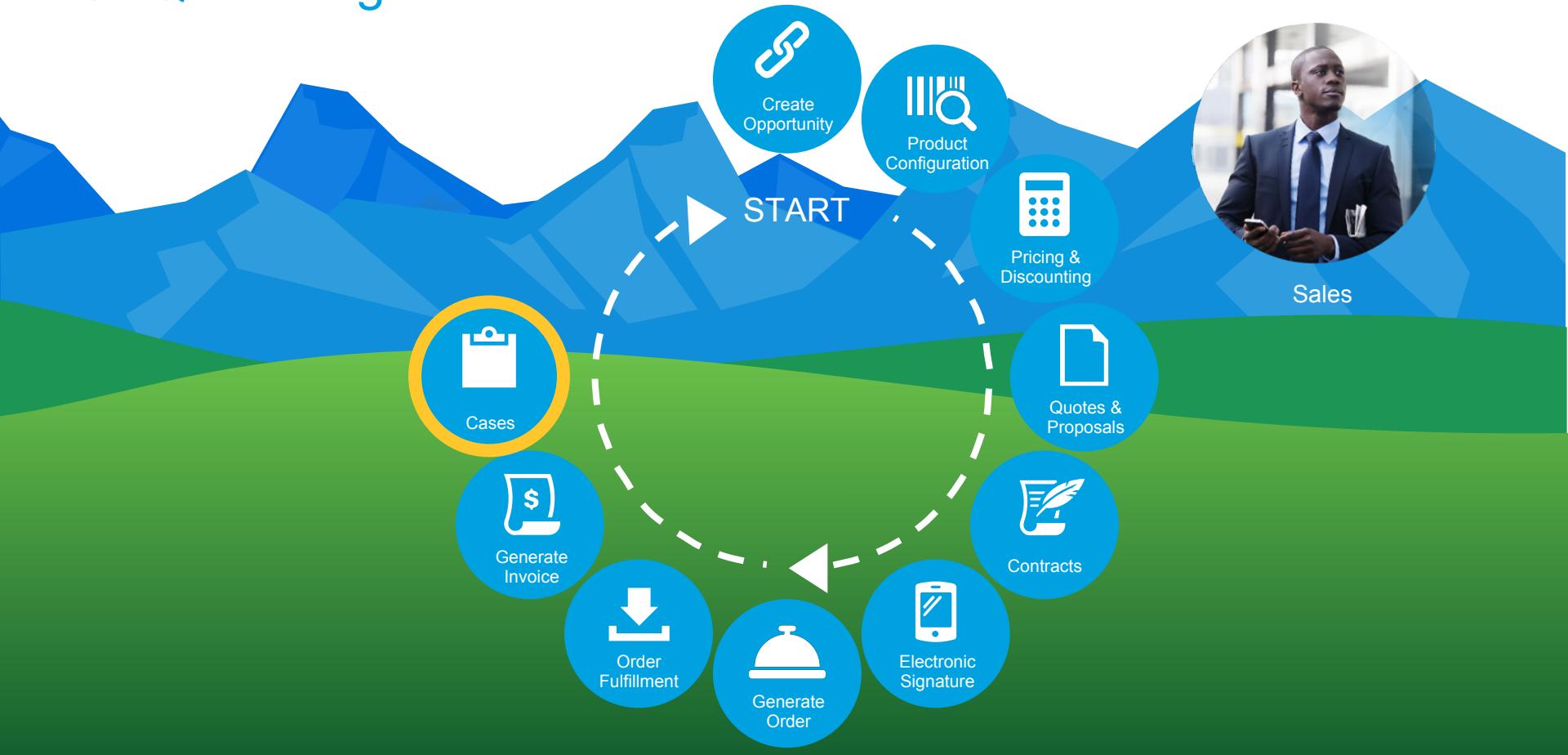
Quote to Order



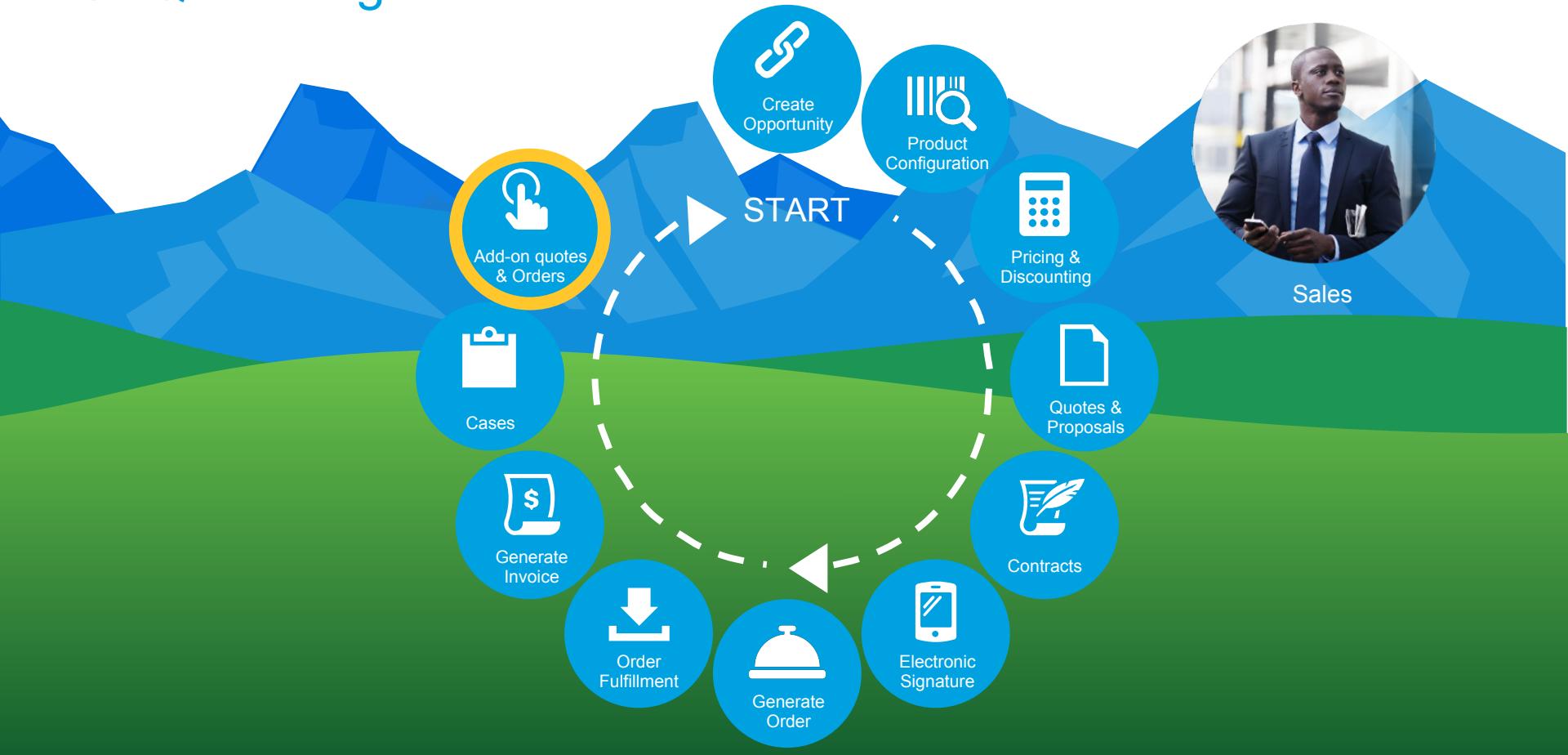
CPQ + Billing



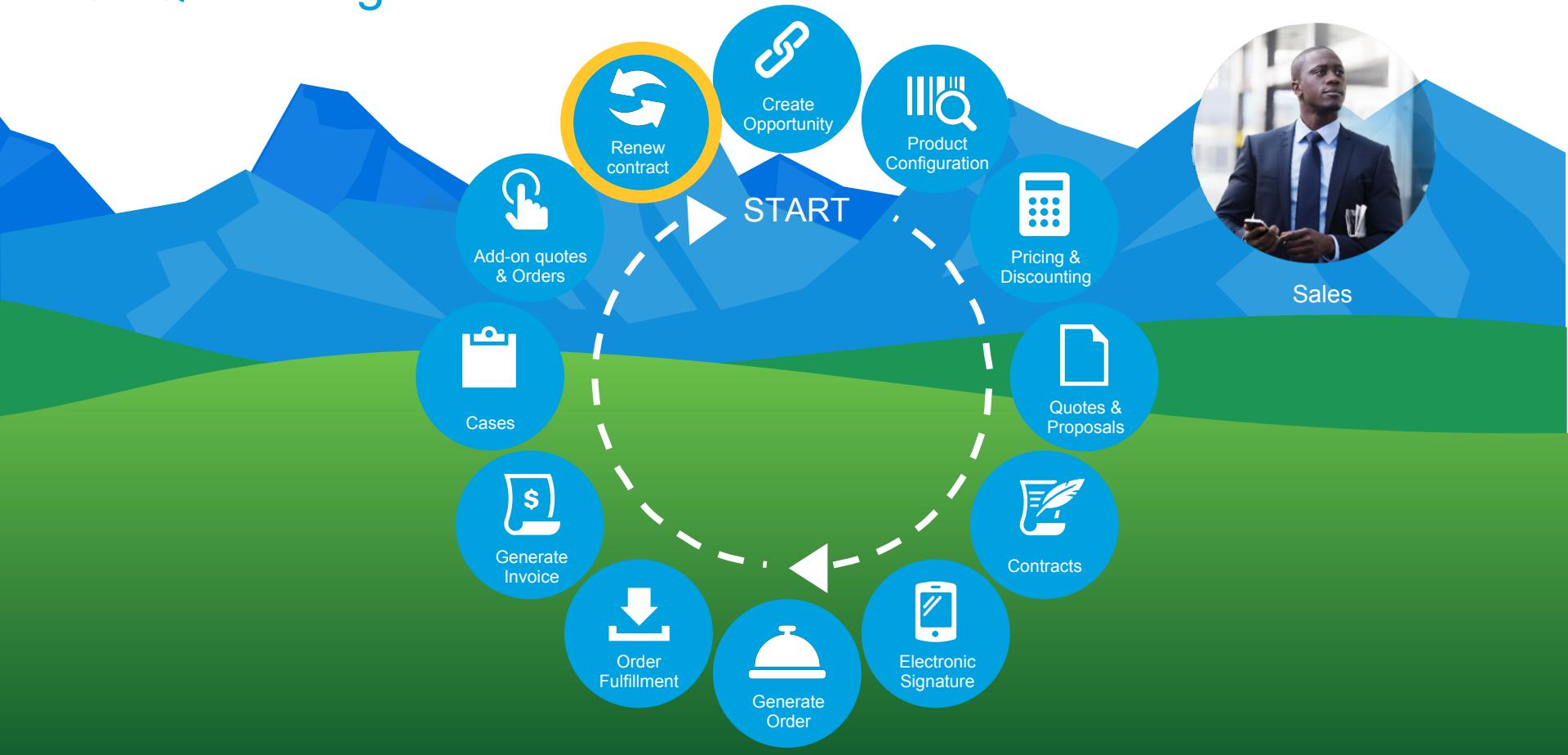
CPQ + Billing



CPQ + Billing



CPQ + Billing



Quote to Cash (QTC)

