

## EX26: Maintenance Kit Price Rule

Objective: Create a rule that automatically updates the quantity of the LaserJet maintenance kit product to exactly 2 times the quantity of printers.

1. Navigate to the Price Rules tab
2. Click New

The screenshot shows the 'Price Rules Home' interface. At the top, there's a navigation bar with 'View: All', 'Go!', 'Edit', and 'Create New View'. Below it is a section titled 'Recent Price Rules' with a 'New' button highlighted by a red box. A message below says 'No recent records. Click Go or select a view from the dropdown to display records.' On the right, there's a 'Recently Viewed' dropdown and a 'Help for this Page' link.

3. Set field values, then Save

The screenshot shows the 'Information' tab of a new price rule configuration. It includes fields for 'Price Rule Name' (Set quantity of LJ-MAINTKIT to twice the quantity of LJ-PRINTER), 'Evaluation Scope' (Calculator), 'Active' (checked), 'Evaluation Order' (10), 'Product' (selected), 'Lookup Object' (None), and 'Evaluation Event' (Available: On Load, After Calculate; Chosen: On Calculate). A red box highlights the 'Active' checkbox and the 'Evaluation Order' field.

4. Click New Price Condition in Price Conditions

The screenshot shows the 'Price Conditions' screen with three tabs: 'Price Conditions', 'Lookup Queries', and 'Price Actions'. Each tab has a 'New [Tab Type]' button highlighted by a red box. Below each tab, a message says 'No records to display'.

5. Set field values, then Save

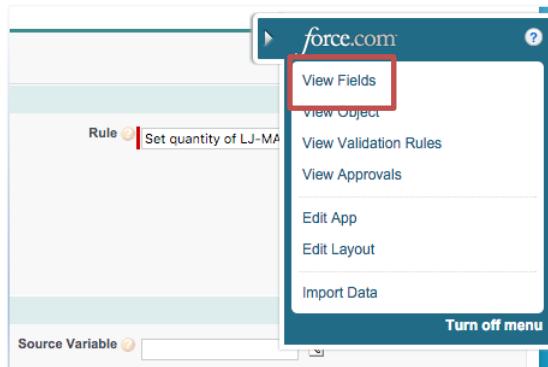
The screenshot shows the 'Information' section of a Price Rule configuration. It includes fields for 'Object' (Quote Line) and 'Field' (Product Code), both highlighted with a red box. Below this is the 'Filter Information' section, which contains a filter for 'Object' (Quote Line), 'Field' (Product Code), 'Operator' (equals), 'Filter Type' (Value), and 'Filter Value' (LJ-MAINTKIT), all also highlighted with a red box.

6. Navigate back to the Price Rule

7. Click New Price Action in Price Actions

The screenshot displays three sections of the Price Rule configuration: 'Price Conditions', 'Lookup Queries', and 'Price Actions'. The 'Price Actions' section is highlighted with a red box around the 'New Price Action' button.

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



9. Click the Target Field link

The screenshot shows a list of objects in a Salesforce application. One object, 'Target Field', is highlighted with a red box. Below the list is a section titled 'Related Lookup Filters' with a note: 'No related lookup filters defined.'

10. Click New in Values

The screenshot shows a 'Values' page with two rows of data. A red box highlights the 'New' button at the top of the page.

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

11. Enter API name of the Quote Line Quantity field, then Save

The screenshot shows the 'Values' page with a single row of data. The 'Values' column contains 'SBQQ\_\_Quantity\_\_c', which is highlighted with a red box.

12. Return to the original Price Action tab and refresh the page

13. In a new tab, navigate to Summary Variables

14. Click New

The screenshot shows the 'Summary Variables' page with a 'Recent Summary Variables' section. A red box highlights the 'New' button at the top of this section.

15. Set field values, then Save

Information

Variable Name: Total quantity of LJ-PRINTER multiplied by 2  
Target Object: Quote Line

Aggregate Function: Sum  
Aggregate Field: Quantity

Filter Information

Filter Field: Product Code  
Filter Value: LJ-PRINTER

Operator: equals  
Constraint Field: --None--

Composite Information

Composite Operator: Multiply  
Value Element: 2

Variable Element: 2

= Required Information

This screenshot shows the 'Information' configuration screen. It includes sections for 'Variable Name' (Total quantity of LJ-PRINTER multiplied by 2), 'Target Object' (Quote Line), 'Aggregate Function' (Sum), 'Aggregate Field' (Quantity), 'Filter Field' (Product Code), 'Filter Value' (LJ-PRINTER), 'Operator' (equals), 'Constraint Field' (None), 'Composite Operator' (Multiply), 'Value Element' (2), and 'Variable Element' (2). A red box highlights the 'Variable Name' and 'Target Object' fields, another highlights the 'Aggregate Function' and 'Aggregate Field' fields, a third highlights the 'Filter Field' and 'Filter Value' fields, and a fourth highlights the 'Composite Operator' and 'Value Element' fields.

16. Return to the original Price Action tab

17. Set field values, then Save

Information

Target Object: Quote Line  
Target Field: SBQQ\_\_Quantity\_c

Rule: Set quantity of LJ-MAIN

Value:

Formula:

Price Action Sources

Source Field:

Source Lookup Field: --None--

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

= Required Information

This screenshot shows the 'Price Action Sources' configuration screen. It includes sections for 'Source Field' (empty), 'Source Lookup Field' (None), and 'Source Variable' (Total quantity of LJ-PRINTER multiplied by 2). A red box highlights the 'Source Variable' field.

## EX27: WiFi Access Point Price Rule

Objective: Create a rule that automatically sets the quantity of WiFi Access Points to ensure that 1 access point is included for every 12 MacBook Pros, and that fractional quantities are not used.

1. Navigate to the Price Rules tab
2. Click New

The screenshot shows the SAP Fiori interface for Price Rules. At the top, there's a navigation bar with 'Price Rules' and 'Home'. Below it, a toolbar has 'View: All', 'Go!', 'Edit', and 'Create New View'. A red box highlights the 'New' button. The main area shows a list of 'Recent Price Rules' with one entry: 'Set quantity of LJ-MAINTKIT to twice the quantity of LJ-PRINTER'. There's also a 'Recently Viewed' dropdown menu.

3. Set field values, then Save

The screenshot shows the 'Information' tab of a price rule configuration. It includes fields for 'Price Rule Name' (Set quantity of WIFIAP based on quantity of AP-MBPRO), 'Evaluation Scope' (Calculator), 'Conditions Met' (All), 'Evaluation Event' (Available: On Load, Chosen: On Calculate), 'Active' (checked), 'Evaluation Order' (20), 'Product' (selected), and 'Lookup Object' (None). A red box highlights the 'Active' checkbox and the 'Evaluation Order' field.

4. Click New Price Condition in Price Conditions

The screenshot shows the 'Price Conditions' screen with three sections: 'Price Conditions', 'Lookup Queries', and 'Price Actions'. Each section has a 'New Price Condition' button. Below each section, it says 'No records to display'. Red boxes highlight the 'New Price Condition' buttons in each section.

5. Set field values, then Save

The screenshot shows the 'Information' tab of a Price Rule configuration. The 'Object' dropdown is set to 'Quote Line' and the 'Field' dropdown is set to 'Product Code'. Both of these fields are highlighted with a red box. Below them is a 'Tested Variable' section and a 'Tested Formula' input field.

The 'Filter Information' section shows a 'Filter Variable' dropdown, an 'Operator' dropdown set to 'equals', a 'Filter Type' dropdown set to 'Value', and a 'Filter Value' dropdown set to 'WIFIAP'. This entire section is highlighted with a red box.

6. Navigate back to the Price Rule

7. Click New Price Action in Price Actions

The screenshot shows the 'Price Conditions' screen. It includes sections for 'Price Conditions', 'Lookup Queries', and 'Price Actions'. The 'Price Actions' section has a 'New Price Action' button highlighted with a red box. Below it, there is a message 'No records to display'.

8. In a new tab, navigate to Summary Variables

9. Click New

The screenshot shows the 'Summary Variables' screen. It has a 'Home' icon, a 'Help for this Page' link, and navigation buttons for 'View: All Go! Edit Create New View'. Below is a 'Recent Summary Variables' list with items like 'Total quantity of LJ-PRINTER multiplied by 2', 'Total quantity of LJ-PRINTER', and 'Total quantity of LJ-TONER'. A 'New' button is highlighted with a red box at the top right of the list area. There is also a 'Recently Viewed' dropdown menu.

10. Set field values, then Save

The screenshot shows the 'Information' configuration screen with several fields highlighted by red boxes:

- Information** tab:
  - Variable Name: Total quantity of AP-MBPRO divided by 12
  - Target Object: Quote Line
  - Aggregate Function: Sum
  - Aggregate Field: Quantity
- Filter Information** tab:
  - Filter Field: Product Code
  - Filter Value: AP-MBPRO
  - Operator: equals
  - Constraint Field: --None--
- Composite Information** tab:
  - Composite Operator: Divide
  - Value Element: 12

11. Return to the original Price Action tab

12. Set field values, then click Save & New

The screenshot shows the 'Price Action Sources' configuration screen with several fields highlighted by red boxes:

- Information** tab:
  - Target Object: Quote Line
  - Target Field: SBQQ\_Quantity\_c
  - Value: 1
  - Rule: Set quantity of WIEIAP\_r
  - Order: 1
- Price Action Sources** tab:
  - Source Variable: Total quantity of AP-MBPRO divided by 12

13. Set field values, then Save

The screenshot shows the 'Price Action Sources' configuration screen with several fields highlighted by red boxes:

- Information** tab:
  - Target Object: Quote Line
  - Target Field: SBQQ\_Quantity\_c
  - Value: 2
  - Rule: Set quantity of WIEIAP\_r
  - Order: 2
- Price Action Sources** tab:
  - Formula: CEILING(SBQQ\_Quantity\_c)
  - Source Variable: Total quantity of AP-MBPRO divided by 12

## EX28: Total Cost of Hardware Price Rule

Objective: Create a rule to automatically update a custom quote-level field to represent the total cost of only products in the Hardware product family.

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

The screenshot shows the 'Custom Fields & Relationships' section of the Salesforce setup. A new row is being added, indicated by the 'New' button highlighted with a red box. The new field is named 'Additional Disc.' with API name 'SBQQ\_\_AdditionalDiscount\_\_c', data type 'Formula (Currency)', and is controlled by 'SteelBrick CPQ'. The 'Modified By' field shows 'Admin User' modified on 5/16/2016 at 1:12 PM. The 'Track History' checkbox is unchecked.

3. Choose Formula then click Next

The screenshot shows the 'Data Type' selection screen. The 'Formula' option is selected and highlighted with a red box. Other options like 'None Selected' and 'Auto Number' are also shown.

4. Set field values, then click Next

The screenshot shows the 'Step 2. Choose output type' screen. The 'Field Label' is set to 'Net Cost' and the 'Field Name' is set to 'Net\_Cost'. In the 'Formula Return Type' section, the 'Currency' option is selected and highlighted with a red box. Other options like 'None Selected', 'Checkbox', and 'Date' are also listed.

5. Set formula as described below, then click Next, Next, Save

SBQQ\_\_Cost\_\_r.SBQQ\_\_UnitCost\_\_c \* SBQQ\_\_Quantity\_\_c

6. Navigate to Setup | Create | Objects | Quote

7. Click New in Custom Fields & Relationships

The screenshot shows the 'Custom Fields & Relationships' section of the Salesforce setup. A new button is highlighted with a red box. The table below lists a custom field named 'SBQQ\_\_Account\_\_c' with a data type of 'Lookup(Account)'.

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified
Edit	Account	SBQQ__Account__c	SteelBrick CPQ	Lookup(Account)	✓	Admin User	5/16/20 1:12 PM

8. Choose Currency then click Next

The screenshot shows the 'Choose Field Type' dialog. The 'Currency' option is selected and highlighted with a red box. Other options like 'External Lookup Relationship', 'Checkbox', 'Date', and 'Date/Time' are also listed with their descriptions.

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

The screenshot shows 'Step 2. Enter the details' of the field creation wizard. The 'Field Label' is set to 'Total Cost of Hardware Products'. The 'Length' is set to 16, and 'Decimal Places' is set to 2. The 'Field Name' is set to 'Total\_Cost\_of\_Hardware'. These fields are all highlighted with red boxes.

10. Navigate to the Price Rules tab

11. Click New

The screenshot shows the 'Price Rules' list page. The 'Recent Price Rules' section has a 'New' button highlighted with a red box. The top right corner has a 'Help for this Page' link.

12. Set field values, then Save

The screenshot shows the 'Information' tab of a price rule configuration. Key fields include:

- Price Rule Name:** Total Cost of Hardware Products
- Evaluation Scope:** Calculator
- Active:** Checked
- Evaluation Order:** 40
- Calculator Evaluation Event:** Available On Initialization Before Calculate
- Lookup Object:** None

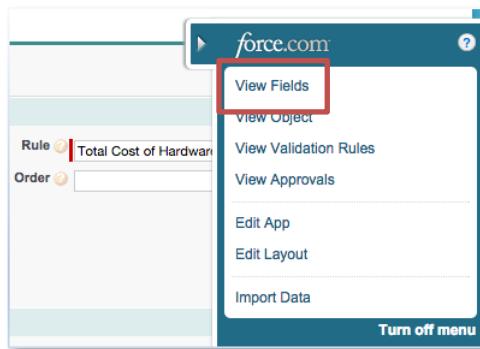
13. Click New Price Action in Price Actions

The screenshot shows the 'Price Actions' section of the interface. It includes:

- Price Conditions:** No records to display
- Lookup Queries:** No records to display
- Price Actions:** No records to display

A prominent 'New Price Action' button is highlighted with a red box.

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



15. Click the Target Field link

The screenshot shows the 'Target Fields' list. A link labeled 'Target Field' is highlighted with a red box.

Edit	Source Variable	SBQQ__SourceVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	✓	Admin User, 5/16/2016 1:12 PM
Edit   Replace	Target Field	SBQQ__Field__c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM
Edit   Replace	Target Object	SBQQ__TargetObject__c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM

16. Click New in Values

The screenshot shows the 'Values' list. A 'New' button is highlighted with a red box at the top of the table header.

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

17. Enter API name of the new Quote Field, then Save



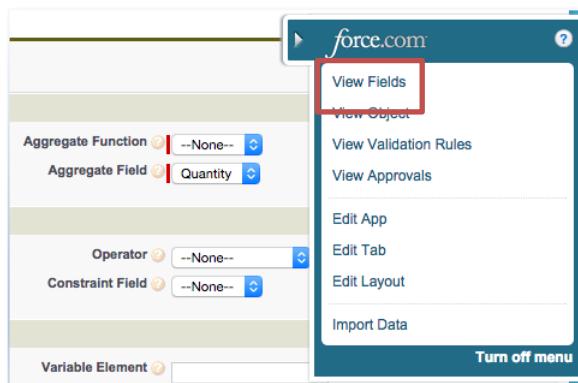
18. Return to the original Price Action tab and refresh the page

19. In a new tab, navigate to Summary Variables

20. Click New



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



22. Click the Aggregate Field link

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit   Replace	Aggregate Field	SBQQ__AggregateField__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM
Edit   Replace	Aggregate Function	SBQQ__AggregateFunction__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM
Edit   Replace	Composite Operator	SBQQ__CompositeOperator__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM

23. Click New in Values

The screenshot shows a table titled 'Values'. At the top right is a 'New' button, which is highlighted with a red box. The table has columns for 'Action', 'Values', 'API Name', 'Default', 'Chart Colors', and 'Modified By'. Under 'Action', there are two rows: 'Edit' and 'Quantity'. Under 'API Name', there are two rows: 'Quantity' and 'Assigned dynamically'. Under 'Modified By', it shows 'Admin User, 7/18/2017 8:26 AM'.

24. Enter API name of the new Quote Line Field, then Save

A screenshot of a single-line text input field. The text 'Net\_Cost\_\_c' is entered into the field, and the entire input field is highlighted with a red box.

25. Return to the original Summary Variables tab and refresh the page

26. Set field values, then Save

The screenshot shows the 'Summary Variable Edit' screen. It has sections for 'Information', 'Filter Information', and 'Composite Information'. In the 'Information' section, 'Variable Name' is set to 'Total Cost of Hardware Products' and 'Target Object' is set to 'Quote Line'. In the 'Aggregate Function' section, 'Sum' is selected and 'Aggregate Field' is set to 'Net\_Cost\_\_c'. In the 'Filter Information' section, 'Filter Field' is set to 'Product Family' and 'Filter Value' is set to 'Hardware'. In the 'Composite Information' section, 'Composite Operator' is set to '--None--'. There are also fields for 'Variable Element' and 'Value Element' at the bottom.

27. Return to the original Price Action tab

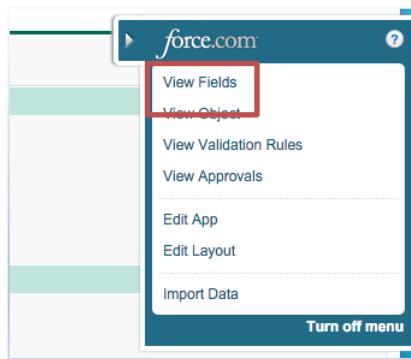
28. Set field values, then Save

The screenshot shows the 'Price Action' screen. In the 'Information' section, 'Target Object' is set to 'Quote' and 'Target Field' is set to 'Total\_Cost\_of\_Hardware\_Products\_\_c'. In the 'Price Action Sources' section, 'Source Variable' is set to 'Total Cost of Hardware Products'. Both the 'Information' and 'Price Action Sources' sections are highlighted with red boxes.

## EX29: Partner Discount Price Rule

Objective: Create a rule to automatically update the Partner Discount quote line field based on the custom Account field named Partner Level. The discount percent will be either 10, 20, or 30 for bronze, silver, or gold, respectively.

1. Navigate to an Account and open the Force.com Quick Access Menu, then click View Fields



2. Click New in Custom Fields & Relationships

Account Custom Fields & Relationships							Account Custom Fields & Relationships Help	
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	
Edit   Del   Replace	Active	Active__c		Picklist			Admin User, 5/16/2016 1:12 PM	
Edit	Combine Asset Quantities	SBQQ__AssetQuantitiesCombined__c	SteelBrick CPQ	Checkbox			Admin User, 5/16/2016 1:12 PM	
Edit	Combine Co-Termed Contracts	SBQQ__CoTermedContractsCombined__c	SteelBrick CPQ	Checkbox			Admin User, 5/16/2016 1:12 PM	

3. Choose Picklist then click Next

The screenshot shows a 'Choose Field Type' dialog. On the left, there is a list of field types with radio buttons: Phone, Picklist (selected and highlighted with a red box), Picklist (Multi-Select), Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted) (with an info icon), and URL. On the right, there is a detailed description for each field type. At the bottom right of the dialog 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>i</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

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

Field Label | Partner Level |

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

Bronze  
Silver  
Gold

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

Field Name | Partner\_Level |

5. Navigate to Setup | Create | Objects | Quote

6. Click New in Custom Fields & Relationships

Standard Fields							Standard Fields Help (?)	
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History		
<u>Created By</u>	CreatedBy	CreatedBy	Lookup(User)				<input type="checkbox"/>	
<u>Last Modified By</u>	LastModifiedBy	LastModifiedBy	Lookup(User)				<input type="checkbox"/>	
<u>Edit Owner</u>	Owner	Owner	Lookup(User,Queue)		✓		<input type="checkbox"/>	
<u>Quote Number</u>	Name	Name	Auto Number		✓		<input type="checkbox"/>	

Custom Fields & Relationships					Custom Fields & Relationships Help (?)			
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit	Account	SBQQ__Account__c	SteelBrick CPQ	Lookup(Account)	✓		Admin User 5/16/2016 1:12 PM	<input type="checkbox"/>

7. Choose Formula then click Next

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

8. Set field values, then click Next

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

Field Label | Partner Level |

Field Name | Partner\_Level |

Percent  
 Text

Calculate a percent and automatically add the percent sign to the number.  
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

Create a text string, for example, by concatenating other text fields.  
Example: `Full Name = LastName & " " & FirstName`

9. Set formula as described below, then click Next, Next, Save

`TEXT (SBQQ__Account__r.Partner_Level__c)`

10. Navigate to the Price Rules tab

11. Click New

Price Rules Home

View: All Go! Edit | Create New View

Recent Price Rules

New

Recently Viewed

Price Rule Name	Total Cost of Hardware Products
Region-based Discount Tiers	

12. Set field values, then Save

Information

Price Rule Name: Partner Discount

Evaluation Scope: Calculator

Conditions Met: All

Active:

Evaluation Order: 50

Product: --None--

Lookup Object: --None--

13. Click New Price Condition in Price Conditions

Price Conditions

New Price Condition

No records to display

Price Conditions Help

Lookup Queries

New Lookup Query

No records to display

Lookup Queries Help

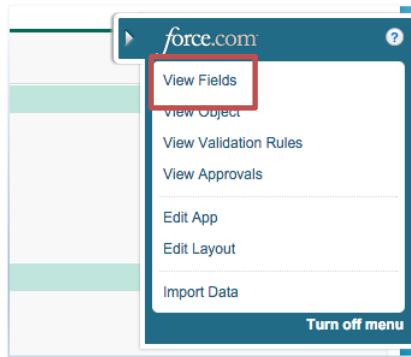
Price Actions

New Price Action

No records to display

Price Actions Help

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



15. Click the Field link

Custom Fields & Relationships							Custom Fields & Relationships Help
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit   Replace	<a href="#">Field</a>	SBQQ__Field__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM
Edit	<a href="#">Filter Formula</a>	SBQQ__FilterFormula__c	SteelBrick CPQ	Long Text Area(131072)			Admin User, 5/16/2016 1:12 PM

16. Click New in Values

Values						Values Help
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit	Product Code	Product Code	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	

17. Enter API name of new Quote field, then Save

A screenshot of the 'Values' page. The 'API Name' input field contains 'Partner\_Level\_\_c'. The 'New' button is highlighted with a red box.

18. Return to the original Price Condition tab and refresh the page

19. Set field values, click Save

The screenshot shows the 'Information' section of a Price Rule configuration. It includes fields for 'Price Rule' (set to 'Partner Discount'), 'Object' (set to 'Quote'), and 'Field' (set to 'Partner\_Level\_\_c'). A red box highlights the 'Object' and 'Field' fields. Below this is the 'Filter Information' section, which contains a 'Filter Formula' with an 'Operator' set to 'not equals', 'Filter Type' set to 'Value', and an empty 'Filter Value' field. A red box highlights the 'Operator', 'Filter Type', and 'Filter Value' fields.

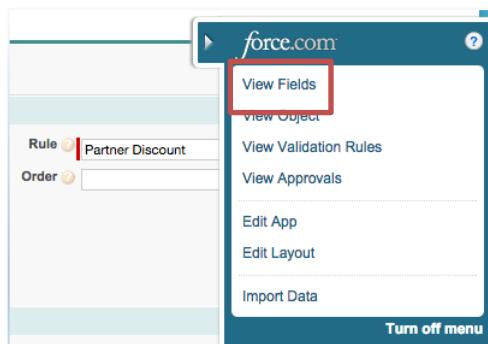
20. Navigate back to the Price Rule

21. Click New Price Action in Price Actions

The screenshot displays three sections of the Price Rule configuration:

- Price Conditions:** Shows one condition: Action 'Edit | Del', Condition # '2', Object 'Quote', Field 'Partner\_Level\_\_c', Tested Variable 'Partner\_Level\_\_c', Operator 'not equals', Filter Type 'Value', Filter Value 'Value'. A red box highlights the 'Action' and 'Condition #' fields.
- Lookup Queries:** Shows 'No records to display'.
- Price Actions:** Shows 'No records to display'. A red box highlights the 'New Price Action' button.

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



23. Click the Target Field link

Edit		SBQQ__SourceVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	<input checked="" type="checkbox"/>	Admin User, 5/16/2016 1:12 PM
Edit   Replace		SBQQ__Field__c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM
Edit   Replace		SBQQ__TargetObject__c	SteelBrick CPQ	Picklist		Admin User, 5/16/2016 1:12 PM

24. Click New in Values

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

25. Enter API name of the Quote Line Partner Discount field, then Save

The screenshot shows a search or configuration interface with a search bar at the top containing the text "SBQQ\_\_PartnerDiscount\_\_c". Below the search bar is a list area with two items: "Unit Price" and "Discount (%)". The "Discount (%)" item is selected.

26. Return to the original Price Action tab and refresh the page

27. Set field values and formula body as described below, then Save

```
CASE (SBQQ__Quote__r.Partner_Level__c,"Bronze",10,"Silver",20,"Gold",30)
```

The screenshot shows the "Information" tab of a Price Action configuration. It includes fields for "Target Object" (set to "Quote Line"), "Target Field" (set to "SBQQ\_\_PartnerDiscount\_\_c"), "Rule" (set to "Partner Discount"), and "Order". The "Formula" field contains the code: `CASE(SBQQ__Quote__r.Partner_Level__c, "Bronze", 10, "Silver", 20, "Gold", 30, 0)`. The "Price Action Sources" section is also visible at the bottom.

## EX30: Create a Lookup Object

Objective: Create a custom object to represent a discount matrix of possible partner discount and product family combinations, to be used in EX29.

1. Navigate to Setup | Create | Objects
2. Click New Custom Object

Custom Objects

Help for this Page ?

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Additional Document	SteelBrick CPQ	✓		Links certain marketing content (datasheets, specifications, case study) to a product or a template.
Edit	Approval	Advanced Approvals	✓		Approval by individual for specific record.

3. Set field values, then Save

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

Context-Sensitive Help Setting  Open the standard Salesforce.com Help & Training window  
 Open a window using a Visualforce page  
Content Name

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  Example: Account Name

Data Type  Display Format  Starting Number   
Example: A-(0000) [What Is This?](#)

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

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

**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

5. Click New in Custom Fields & Relationships

**Standard Fields**

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
<u>Created By</u>	CreatedBy	Lookup(User)			
<u>Last Modified By</u>	LastModifiedBy	Lookup(User)			
<u>Edit Owner</u>	Owner	Lookup(User,Queue)		✓	
<u>Edit Partner Level Discount Name</u>	Name	Auto Number		✓	

**Custom Fields & Relationships**

<b>New</b>	Field Dependencies
------------	--------------------

No custom fields defined

6. Choose Picklist then click Next

<input checked="" type="radio"/> <b>Picklist</b>	Allows users to select a value from a list you define.
<input type="radio"/> <b>Picklist (Multi-Select)</b>	Allows users to select multiple values from a list you define.
<input type="radio"/> <b>Text</b>	Allows users to enter any combination of letters and numbers.
<input type="radio"/> <b>Text Area</b>	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> <b>Text Area (Long)</b>	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> <b>Text Area (Rich)</b>	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> <b>Text (Encrypted)</b>	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> <b>URL</b>	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**

7. Set field values, click Next, Next, then click Save & New

**Step 2. Enter the details** Step 2 of 4

**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

**Previous** **Next** **Cancel**

## 8. Choose Picklist then click Next

The screenshot shows a list of field types with their descriptions. The 'Picklist' option is highlighted with a red box and has a blue radio button next to it. Other options include Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), and URL.

Field Type	Description
<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>i</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

## 9. Set field values, click Next, Next, then click Save & New

The screenshot shows the 'Step 2. Enter the details' screen for a picklist field. The field label is 'Product Family'. The 'Values' section is highlighted with a red box and contains two options: 'Use global picklist definition' (unchecked) and 'Enter values for the picklist, with each value separated by a new line.' Below this, a text area contains the values: 'Hardware', 'Software', and 'Support'.

**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

## 10. Choose Number then click Next

The screenshot shows a list of field types with their descriptions. The 'Number' option is highlighted with a red box and has a blue radio button next to it. Other options include Email, Geolocation, Percent, Phone, and Picklist.

Field Type	Description
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input checked="" type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.

## 11. Set field values, then click Next, Next, Save

The screenshot shows the 'Step 2. Enter the details' screen for a number field. The field label is 'Partner Discount'. Below it, there is a note: '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".' Two input fields are highlighted with red boxes: 'Length' (containing '16') and 'Decimal Places' (containing '2').

**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

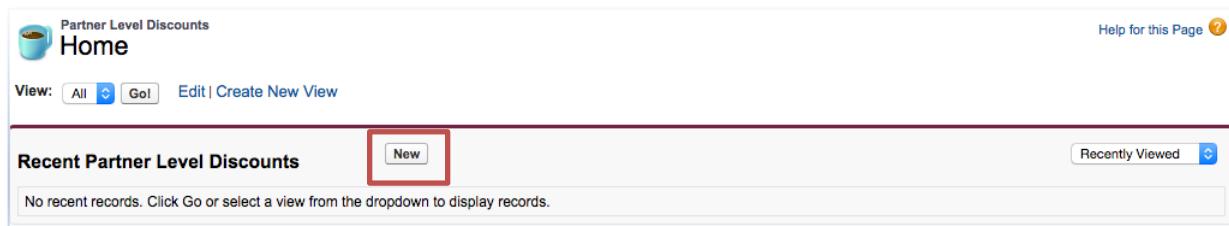
Decimal Places  Number of digits to the right of the decimal point

Field Name  i

Previous Next Cancel

12. Navigate to Partner Level Discount tab

13. Click New



14. Set Fields, then Save & New

A screenshot of a "Information" section for a new record. It includes fields for "Partner Level" (set to "Bronze"), "Product Family" (set to "Hardware"), and "Partner Discount" (set to "5"). The "Owner" field shows "Brian Cloutier". A red box highlights the "Partner Level", "Product Family", and "Partner Discount" fields.

15. Create remaining Partner Discount Level records per table:

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

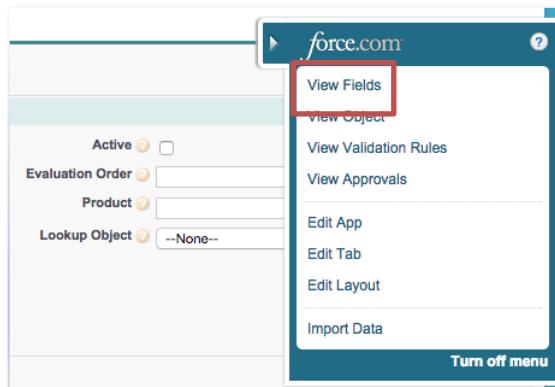
## EX31: Partner Discounts by Product Family

Objective: Create a rule to automatically set the value of Partner Discount based on the account Partner Level as well as the quote line Product Family by querying the Partner Level Discount records created in EX30.

1. Navigate to the Price Rules tab
2. Click New

The screenshot shows the 'Price Rules Home' page. At the top, there's a navigation bar with 'View: All', 'Go!', 'Edit | Create New View', and 'Help for this Page'. Below it is a section titled 'Recent Price Rules' containing four items: 'Price Rule Name' (Partner Discount), 'Total Cost of Hardware Products', and 'Region-based Discount Tiers'. A red box highlights the 'New' button at the top right of this section.

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



4. Click the Lookup Object link

Edit   Replace	Evaluation Scope	SBQQ__TargetObject__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit   Replace	Lookup Object	SBQQ__LookupObject__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit	Product	SBQQ__Product__c	SteelBrick CPQ	Lookup(Product)	✓ Admin User, 5/16/2016 1:12 PM

5. Click New in Values

Values		New	Values Help		
Action	Values	API Name	Default	Chart Colors	Modified By
Edit	SBQQ__LookupData__c	SBQQ__LookupData__c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM

6. Enter API name of the Partner Level Discount Object, then Save

A screenshot of a search interface. A text input field contains the text 'Partner\_Level\_Discount\_\_c'. The entire input field is highlighted with a red rectangular border.

7. Return to the original Price Rule tab and refresh the page  
8. Set field values, then Save

A screenshot of the 'Information' tab of a Price Rule setup screen. Several fields are highlighted with red boxes:

- 'Price Rule Name' (containing 'Partner Discount by Product Family') and 'Evaluation Scope' (set to 'Calculator').
- 'Active' checkbox (checked) and 'Evaluation Order' (set to 60).
- 'Lookup Object' (set to 'Partner\_Level\_Discount\_\_c').

The top right corner of the screen has a note: 'Required Information' with a red exclamation mark icon.

9. Click New Price Condition in Price Conditions

A screenshot of the 'Price Conditions' section of the interface. It contains three tabs:

- 'Price Conditions' tab: Contains a 'New Price Condition' button highlighted with a red box.
- 'Lookup Queries' tab: Contains a 'New Lookup Query' button.
- 'Price Actions' tab: Contains a 'New Price Action' button.

Each tab has a note below it: 'No records to display'.

10. Set field values, click Save

A screenshot of the 'Information' tab of a Price Rule setup screen. The 'Object' dropdown (set to 'Quote') and 'Field' dropdown (set to 'Partner\_Level\_\_c') are highlighted with a red box.  
Below, the 'Filter Information' section is shown:

- 'Operator' dropdown (set to 'not equals').
- 'Filter Type' dropdown (set to 'Value').
- 'Filter Value' input field.

The entire 'Filter Information' section is highlighted with a red box.

11. Navigate back to the Price Rule

12. Click New Lookup Query in Lookup Queries

Price Conditions										New Price Condition	Price Conditions Help
Action	Condition #	Object	Field	Tested Variable	Operator	Filter Type	Filter Value	Filter Variable			
Edit   Del	2	Quote	Partner_Level_c		not equals	Value					

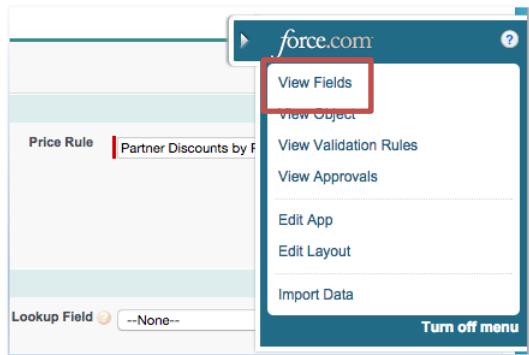
  

Lookup Queries										New Lookup Query	Lookup Queries Help
No records to display											

Price Actions										New Price Action	Price Actions Help
No records to display											

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



14. Click the Tested Field link

Edit	<a href="#">RuleTargetsCalculator</a>	SBQQ__RuleTargetsCalculator__c	SteelBrick CPQ	Formula (Checkbox)	Admin User, 5/16/2016 1:12 PM
Edit   Replace	<a href="#">Tested Field</a>	SBQQ__TestedField__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit   Replace	<a href="#">Tested Object</a>	SBQQ__TestedObject__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM

15. Click New in Values

Values						New	Values Help
Action	Values	API Name	Default	Chart Colors	Modified By		
Edit	Product Code	Product Code	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM		

16. Enter name of the Quote Line Product Family field and Quote Partner Level field, then Save

17. Return to Lookup Query object

Custom Field Definition Detail

Field Label: Tested Field  
Field Name: TestedField  
Namespace Prefix: SBQQ  
API Name: SBQQ\_\_TestedField\_\_c

Object Name: **Lookup Query**  
Data Type: **Picklist**

18. Click the Lookup Field link

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit   Replace	<b>Lookup Field</b>	SBQQ__LookupField__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM
Edit   Replace	Match Type	SBQQ__MatchType__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM

19. Click New in Values

Values

New

Action	Values	API Name	Default	Chart Colors	Modified By
Edit	SBQQ__Category__c	SBQQ__Category__c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM

20. Enter API name of the Product Family and Partner Level from the Partner Discount Object, then Save

Product\_Family\_\_c  
Partner\_Level\_\_c

21. Return to the original Lookup Query tab and refresh the page

22. Set field values, then Save & New

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

23. Set field values, then Save

24. Return to the Partner Discounts by Product Family Price Rule

25. Click New Price Action in Price Actions

Action	Condition #	Object	Field	Tested Variable	Operator	Filter Type	Filter Value	Filter Variable
Edit   Del 2		Quote	Partner_Level__c		not equals		Value	

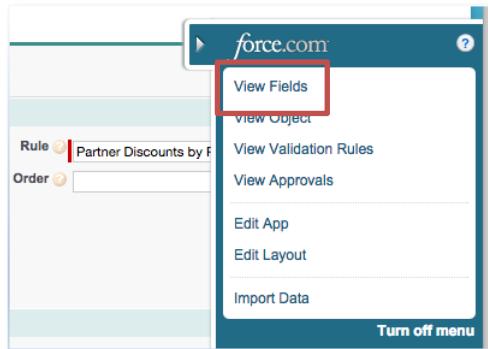
  

Action	Lookup Query #	Match Type	Tested Object	Tested Field	Tested Value	Operator	Lookup Field
Edit   Del 0		Field Value	Quote Line	SBQQ_ProductFamily__c		equals	Product_Family__c
Edit   Del 1		Field Value	Quote	Partner_Level__c		equals	Partner_Level__c

Action	New Price Action								Price Actions Help (?)
No records to display									

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



27. Click the Source Lookup Field link

Edit	Source Field	SBQQ_ValueField__c	SteelBrick CPQ	Text(100)	Admin User, 5/16/2016 1:12 PM
Edit   Replace	Source Lookup Field	SBQQ_SourceLookupField__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit	Source Variable	SBQQ_SourceVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	✓ Admin User, 5/16/2016 1:12 PM

28. Click New in Values

The screenshot shows a table titled "Values". A red box highlights the "New" button at the top right. The table has columns: Action, Values, API Name, Default, Chart Colors, and Modified By. There is one existing row: Action is "Edit", Value is "SBQQ\_\_Value\_\_c", API Name is "SBQQ\_\_Value\_\_c", Default is checked, Chart Colors is "Assigned dynamically", and Modified By is "Admin User, 7/18/2017 8:26 AM".

29. Enter API name of the Partner Discount field from the Partner Discount Object, then

Save

A screenshot of a search or input field. A red box highlights the text "Partner\_Discount\_\_c" which is typed into the field.

30. Return to the original Price Action tab and refresh the page

31. Set field values, then Save

The screenshot shows the "Information" tab of a Price Action configuration. Several fields are highlighted with red boxes: "Target Object" (set to "Quote Line"), "Target Field" (set to "SBQQ\_\_PartnerDiscount\_\_c"), and "Order" (set to "1"). In the "Price Action Sources" section, the "Source Lookup Field" is also highlighted and set to "Partner\_Discount\_\_c".

## EX36: Create a Quote Template

Objective: Create a basic template used to generate simple customer-facing proposals, in PDF format.

1. Navigate to the Quote Templates tab
2. Click New

The screenshot shows the 'Quote Templates' tab selected in the top navigation bar. On the left, there's a sidebar titled 'Recent Items' listing various quote entries like 'Q-00005', 'Renewal Opportunity', and 'Second Big Sale'. In the main area, a section titled 'Recent Quote Templates' displays a single entry 'No recent records. Click Go or select a view from the dropdown to display records.' A prominent red box highlights the 'New' button at the top right of this section.

3. Set field values, then Save

This screenshot shows the 'Information' section of the quote template creation form. It includes fields for 'Template Name' (set to 'Training Proposal'), 'Deployment Status' (set to 'In Development'), 'Default' (unchecked), 'Logo Document Id', 'Watermark ID', 'Generator Name', 'Page Width' (8.50), 'Top Margin' (0.50), 'Left Margin' (0.50), 'Page Height' (11.00), 'Bottom Margin' (0.50), 'Right Margin' (0.50), 'Company Name' (Infinity Solutions), 'Company Slogan', 'Company Phone' ((650) 627-7030), 'Company Fax', 'Company Email' (info@infinitysolution.com), 'Company Street' (1730 S El Camino Real), 'Company City' (San Mateo), 'Company State' (CA), 'Company Postal Code' (64402), and 'Company Country' (United States). Red boxes highlight the 'Template Name', 'Deployment Status', and the entire 'Corporate Information' block.

4. Navigate to any existing quote with line items, then click Preview Document

This screenshot shows the 'Quote Detail' screen for quote 'Q-00005'. It displays basic quote information like 'Quote Number' (Q-00005), 'Primary' (checked), 'Status' (Draft), 'Expires On' (2/17/2016), and 'Sales Rep' (Brian Cloutier). To the right, it shows financial details: 'Opportunity' (Renewal Opportunity), 'Net Amount' (\$27,060.00), 'Customer Amount' (\$27,060.00), 'Regular Amount' (\$27,060.00), and 'List Amount' (\$27,060.00). At the bottom, there are buttons for 'Edit', 'Delete', 'Clone', 'Edit Lines', 'Include Document', 'Generate Document', 'Preview Document' (which is highlighted with a red box), and 'Refresh Prices'. Above the preview button, there are links for 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'.

## **EX37: Upload a Logo File**

Objective: Add a company logo to appear in the upper-left of the first page of the generated proposal.

1. Navigate to the Documents tab

## 2. Click New

The screenshot shows the Salesforce Documents Home page. At the top, there's a search bar with the placeholder "Enter keywords to find matching documents." Below it is a "Find Document" button. The main area is titled "Document Folders" and shows a folder named "My Personal Documents". There are "Go!" and "Create New Folder" buttons. Below this is a section titled "Recent Documents" with a "New" button highlighted with a red box. A message says "No recent records. Click Go or select a view from the dropdown to display records." At the top right, there are links for "Tell me more!" and "Help for this Page".

## 3. Set field values, click Choose File, select your file, then Save

The screenshot shows two steps for creating a new document.   
Step 1: "Enter details" form. Fields shown include "Document Name" (Company Logo), "Document Unique Name" (Company\_Logo), "Externally Available Image" (checked), "Folder" (Output Document Resources), and "Description". The "Keywords" field is also present.   
Step 2: "Select the File" form. It has two options: "Enter the path of the file or click browse to find the file." (selected) and "Create a reference link to the file. Enter a file location that others can access." The "File to upload" field contains "Choose File | Steel BrickLogo.png".   
Both steps have a red box highlighting the "Choose File" button in the second step.

## 4. Copy the last portion of the URL

A screenshot of a web browser showing a URL in the address bar: <https://na30.salesforce.com/01536000000LB5d>. The portion of the URL after the slash is highlighted with a red box.

## 5. Navigate to the Quote Template

## 6. Paste portion of URL into Logo Document ID, then Save

The screenshot shows the "Quote Template Detail" page for a template named "Training Proposal". It includes fields for "Template Name" (Training Proposal), "Deployment Status" (In Development), and "Generator Name". On the right, there's a "Default" button and a "Logo Document Id" field containing "01536000000LB5d" with a red box around it. Below it is a "Watermark ID" field. At the bottom, there are "Save" and "Cancel" buttons. Navigation links at the top include "Customize Page", "Edit Layout", "Printable View", and "Help for this Page".



## EX38: Add Draft Watermark

Objective: Add a watermark that appears behind text on the generated proposal if the Quote field named Watermark Shown is true.

1. Navigate to the Documents tab
2. Choose the Output Document Resources folder (click Go! if already selected)

The screenshot shows the Salesforce Documents Home page. At the top, there's a search bar with a placeholder 'Enter keywords to find matching documents.' and a 'Find Document' button. Below the search bar is a section titled 'Document Folders'. A red box highlights the 'Folder' dropdown menu set to 'Output Document Resources' and the 'Go!' button next to it. Other options in the dropdown include 'Edit' and 'Create New Folder'.

3. Click on Watermark.png link

The screenshot shows a list of documents in a Salesforce interface. The table has columns for Action, Name, Description, File Size, Last Modified, Type, and Author. A red box highlights the 'Name' column for the 'Watermark.png' file, which is listed as the last item in the list.

Action	Name	Description	File Size	Last Modified	Type	Author
Edit   Del   View   Email	Collaboration Suite Data Sheet.pdf		304KB	5/19/2016	pdf	BClou
Edit   Del   View   Email	Company Logo		3KB	5/19/2016	png	BClou
Edit   Del   View   Email	ERP Suite Data Sheet.pdf		355KB	5/19/2016	pdf	BClou
Edit   Del   View   Email	Time and Expense Suite Data Sheet.pdf		372KB	5/19/2016	pdf	BClou
Edit   Del   View   Email	Watermark.png		80KB	5/19/2016	png	BClou

4. Copy the last portion of URL

The screenshot shows a browser address bar with the URL <https://na30.salesforce.com/01536000001dJ2V>. A red box highlights the末尾部分 of the URL, specifically '01536000001dJ2V'.

5. Navigate to the Quote Template
6. Paste portion of URL into Watermark ID, then Save

The screenshot shows the 'Quote Template Detail' page for a template named 'Training Proposal'. The page includes fields for Template Name, Deployment Status (set to 'In Development'), Generator Name, and Watermark ID. The Watermark ID field contains the value '01536000001dJ2V', which is highlighted with a red box. There are also buttons for Save and Cancel.

7. Navigate to any existing quote with line items

8. Update field value, then Save

<b>▼ Quote Options</b>	
Group Line Items <input type="checkbox"/>	
Print Line Items <input checked="" type="checkbox"/>	
Watermark Shown <input checked="" type="checkbox"/> 	
<b>▼ Address Information</b>	
Bill To Name	Burlington Textiles Corp of America
Bill To Street	525 S. Lexington Ave
Bill To City	Burlington
Bill To State	NC
Bill To Postal Code	27215
Bill To Country	USA
Ship To Name	Burlington Textiles Corp of America
Ship To Street	525 S. Lexington Ave
Ship To City	Burlington
Ship To State	NC
Ship To Postal Code	27215
Ship To Country	USA

## EX39: Add Additional Documents

Objective: Allow sales reps to include supplemental PDFs concatenated to the generated proposal.

1. Navigate to the Documents tab
2. Choose the Output Document Resources folder (click Go! if already selected)

The screenshot shows the 'Documents Home' page. At the top, there's a search bar with placeholder text 'Enter keywords to find matching documents.' and a 'Find Document' button. Below the search bar is a 'Document Folders' section. A red box highlights the 'Output Document Resources' folder under the 'Folder' dropdown menu. To the right of the dropdown is a 'Go!' button and a link 'Edit | Create New Folder'. At the top right of the page, there are links 'Tell me more!' and 'Help for this Page'.

3. Click on Collaboration Suite Data Sheet.pdf link

The screenshot shows a list of documents under the 'New Document' heading. The columns are 'Action', 'Name', 'Description', 'File Size', 'Last Modified', 'Type', and 'Author'. A red box highlights the 'Name' column for the first document, which is 'Collaboration Suite Data Sheet.pdf'. The other documents listed are 'Company Logo', 'ERP Suite Data Sheet', and 'Time and Expense Suite Data Sheet'. Each document has an 'Edit | Del | View | Email' link next to it.

Action	Name	Description	File Size	Last Modified	Type	Author
Edit   Del   View   Email	<a href="#">Collaboration Suite Data Sheet</a>		304KB	7/18/2017	pdf	AUser
Edit   Del   View   Email	<a href="#">Company Logo</a>		6KB	7/18/2017	png	AUser
Edit   Del   View   Email	<a href="#">ERP Suite Data Sheet</a>		355KB	7/18/2017	pdf	AUser
Edit   Del   View   Email	<a href="#">Time and Expense Suite Data Sheet</a>		372KB	7/18/2017	pdf	AUser

4. Copy the last portion of URL

The screenshot shows a web browser's address bar with the URL 'https://na30.salesforce.com/015360000001dJ2Y'. A red box highlights the entire URL.

5. Navigate to the Quote Template
6. Click New Additional Document in Additional Documents

The screenshot shows the 'Additional Documents' section of a quote template. At the top, there's a 'Sections' section with a 'New Template Section' button. Below it is an 'Additional Documents' section with a 'New Additional Document' button. Both sections have a 'No records to display' message. A red box highlights the 'New Additional Document' button.

7. Paste portion of URL into Logo Document ID, enter Display Order, then Save

Information

= Required Information

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

Save Cancel



8. Repeat steps 1-7 for ERP Suite Data Sheet.pdf (display order 20)

## EX40: Assemble Custom Document

Objective: Use provided Template Content to replace the simple structure of the standard proposal with customizable content. The updated proposal will include a cover page, a page for a cover letter, the familiar quote line table, updated headers, and an expanded signature block.

1. Navigate to the Quote Template
2. Click New Template Section in Sections

The screenshot shows two pages from a software interface. The top page is titled 'Line Columns' and contains a table with columns for Action, Column Heading, Display Order, Width, Field Name, and Alignment. The table includes rows for QTY, PART #, DESCRIPTION, UNIT PRICE, and DISC (%). The bottom page is titled 'Sections' and shows a button labeled 'New Template Section' which is highlighted with a red box. Below this button, it says 'No records to display'.

3. Set field values, then click Save & New

The screenshot shows the 'Information' dialog box for creating a new template section. It has two main sections: 'Section Name' (set to 'Cover Page') and 'Template' (set to 'Training Proposal'). Other fields include 'Top Margin' (0.00), 'Display Order' (10), 'Content' (set to 'Training Cover Page'), and 'Bottom Margin' (0.00). There are also sections for 'Print Quote Totals', 'Group Field', and 'Border Color'.

4. Repeat step 3 to create sections for the following template content:
  - a. Training Cover Letter (display order 20, set page break to Before)
  - b. Training Tail Header (display order 30, set page break to Before)
  - c. Training Prepared For (display order 40)
  - d. Training Line Items (display order 50)
  - e. Training Signature Block (display order 70)

## EX44: Adjust Line Columns

Objective: Change the Part # column to display Product Name instead, while adjusting the width of the column to accommodate longer text. Reduce the width of the Description column to account for the larger Product Name column.

1. Navigate to the Quote Template
2. Click Edit next to the Part # column

Line Columns						<a href="#">New Line Column</a>	<a href="#">Line Columns Help</a> (?)
Action	Column Heading	Section	Display Order	Width	Field Name	Alignment	
Edit   Del	QTY		10	5.00	SBQQ__Quantity__c	Left	
Edit   Del	START DATE	MDQ Items	15	15.00	SBQQ__StartDate__c	Left	
Edit   Del	PART #		20	10.00	SBQQ__ProductCode__c	Left	
Edit   Del	DESCRIPTION		30	50.00	SBQQ__Description__c	Left	

3. Update field values, then Save

**Information** ! = Required Information

Column Heading	<input type="text" value="PRODUCT"/>
Display Order	<input type="text" value="20"/>
Width	<input type="text" value="20.00"/>
Section	<input type="text" value=""/>

**Template** Training Proposal

Field Name	<input type="text" value="SBQQ__ProductName__c"/>
Alignment	<input type="text" value="Left"/>

4. Click Edit next to the Description column

Line Columns						<a href="#">New Line Column</a>	<a href="#">Line Columns Help</a> (?)
Action	Column Heading	Section	Display Order	Width	Field Name	Alignment	
Edit   Del	QTY		10	5.00	SBQQ__Quantity__c	Left	
Edit   Del	START DATE	MDQ Items	15	15.00	SBQQ__StartDate__c	Left	
Edit   Del	PRODUCT		20	20.00	SBQQ__ProductName__c	Left	
Edit   Del	DESCRIPTION		30	50.00	SBQQ__Description__c	Left	
Edit   Del	UNIT PRICE		40	10.00	SBQQ__ListPrice__c	Right	

[Show 2 more »](#) | [Go to list \(7\) »](#)

5. Update field value, then Save

**Information** ! = Required Information

Column Heading	<input type="text" value="DESCRIPTION"/>
Display Order	<input type="text" value="30"/>
Width	<input type="text" value="40.00"/>
Section	<input type="text" value=""/>

**Template** Training Proposal

Field Name	<input type="text" value="SBQQ__Description__c"/>
Alignment	<input type="text" value="Left"/>

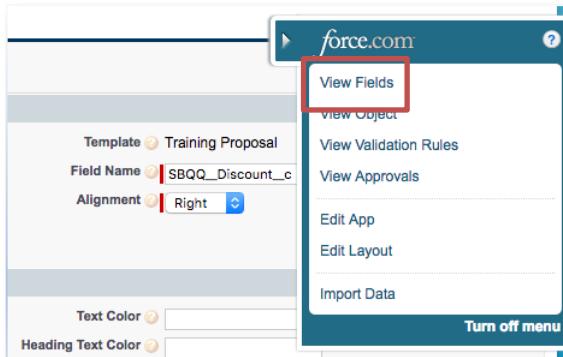
## EX45: Conditional Discount Column

Objective: Setup the Discount column to appear only when sales reps have manually entered Quote Line discretionary discounts, otherwise the column will disappear and the other columns will grow to cover the gap.

1. Navigate to the Quote Template
2. Click Edit next to the Disc (%) column

Line Columns		New Line Column		Line Columns Help (?)		
Action	Column Heading	Section	Display Order	Width	Field Name	Alignment
Edit   Del	QTY		10	5.00	SBQQ__Quantity__c	Left
Edit   Del	START DATE	MDQ Items	15	15.00	SBQQ__StartDate__c	Left
Edit   Del	PRODUCT		20	20.00	SBQQ__ProductName__c	Left
Edit   Del	DESCRIPTION		30	40.00	SBQQ__Description__c	Left
Edit   Del	UNIT PRICE		40	10.00	SBQQ__ListPrice__c	Right
Edit   Del	DISC (%)		50	10.00	SBQQ__Discount__c	Right
Edit   Del	EXTENDED		60	15.00	SBQQ__NetTotal__c	Right

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



4. Click the Conditional Print Field link

Custom Fields & Relationships							Custom Fields & Relationships Help (?)	
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	
Edit   Replace	Alignment	SBQQ__Alignment__c	SteelBrick CPQ	Picklist			Brian Cloutier, 5/19/2016 12:41 PM	
Edit	Bottom Margin (px)	SBQQ__BottomMargin__c	SteelBrick CPQ	Number(5, 0)			Brian Cloutier, 5/19/2016 12:41 PM	
Edit   Replace	Column Heading Field	SBQQ__ColumnHeadingField__c	SteelBrick CPQ	Picklist			Brian Cloutier, 5/19/2016 12:41 PM	
Edit   Replace	Conditional Print Field	SBQQ__ConditionalPrintField__c	SteelBrick CPQ	Picklist			Brian Cloutier, 5/19/2016 12:41 PM	
Edit	Discard Width When Hidden	SBQQ__WidthDiscardedWhenHidden__c	SteelBrick CPQ	Checkbox			Brian Cloutier, 5/19/2016 12:41 PM	

5. Click New in Values

The screenshot shows a table titled 'Values'. The columns are: Action, Values, API Name, Default, Chart Colors, and Modified By. There is one row visible with the value 'Group Line Items' in the 'Values' column and 'Group Line Items' in the 'API Name' column. The 'Default' column has a checkbox which is unchecked. The 'Chart Colors' column says 'Assigned dynamically'. The 'Modified By' column shows 'Admin User, 7/6/2017 1:32 PM'. A red box highlights the 'New' button at the top right of the table.

6. Enter API name of the Quote Line Additional Disc. (Amt) field, then Save

The screenshot shows a search or input dialog box. Inside, there is a text input field containing the text 'SBQQ\_\_AdditionalDiscountAmount\_\_c'. A red box highlights this input field.

7. Return to the original Line Column tab and refresh the page

8. Set field value, then Save

The screenshot shows the 'Column Options' dialog box. It contains various settings: 'Hide On Components' (unchecked), 'Roll Up' (unchecked), 'Conditional Print Field' (set to 'SBQQ\_\_AdditionalDiscountAmount\_\_c'), 'Discard Width When Hidden' (unchecked), 'Column Heading Field' (set to '--None--'), 'Dynamic Number Scale' (unchecked), 'Separate Line' (unchecked), 'Summary Level' (set to 'All'), 'Summary Function' (set to '--None--'), 'Summary Label' (empty), and 'Sub Group Summary Label' (empty). A red box highlights the 'Conditional Print Field' dropdown. At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

## EX46: Conditional Pricing Columns

Objective: Allow sales reps to control visibility of the Unit Price and Extended columns by creating a Quote checkbox field named Show Pricing Columns. When false, the columns will disappear and the other columns will grow to fill the gap.

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

Custom Fields & Relationships							Custom Fields & Relationships Help		
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History	
Edit	Account	SBQQ__Account__c	SteelBrick CPQ	Lookup(Account)	✓		Brian Cloutier, 5/19/2016 12:41 PM	<input type="checkbox"/>	
Edit	Additional Disc. (%)	SBQQ__CustomerDiscount__c	SteelBrick CPQ	Percent(3, 2)			Brian Cloutier, 5/19/2016 12:41 PM	<input type="checkbox"/>	

3. Choose Checkbox then click Next

External Lookup Relationship      Creates a relationship that links this object to an external object whose data is stored in an external data source.

**Checkbox**      Allows users to select a True (checked) or False (unchecked) value.

Currency      Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date      Allows users to enter a date or pick a date from a popup calendar.

4. Enter Show Pricing Columns as the field label, then click Next, Next, Save

Field Label **Show Pricing Columns** 

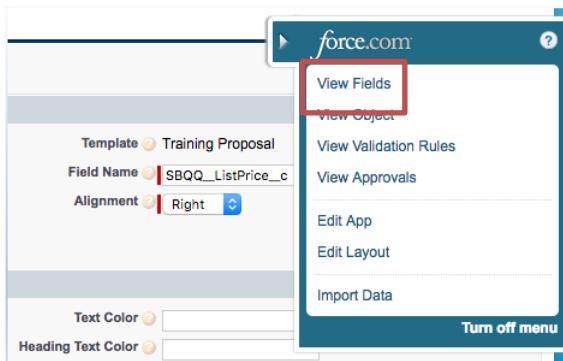
Default Value  Checked  Unchecked

Field Name **Show\_Pricing\_Columns** 

5. Navigate to the Quote Template
6. Click Edit next to the Unit Price column

Line Columns							Line Columns Help	
Action	Column Heading	Section	Display Order	Width	Field Name	Alignment		
Edit   Del	QTY		10	5.00	SBQQ__Quantity__c	Left		
Edit   Del	START DATE	MDQ_Items	15	15.00	SBQQ__StartDate__c	Left		
Edit   Del	PRODUCT		20	20.00	SBQQ__ProductName__c	Left		
Edit   Del	DESCRIPTION		30	40.00	SBQQ__Description__c	Left		
Edit   Del	UNIT PRICE		40	10.00	SBQQ__ListPrice__c	Right		
Edit   Del	DISC (%)		50	10.00	SBQQ__Discount__c	Right		
Edit   Del	EXTENDED		60	15.00	SBQQ__NetTotal__c	Right		

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



8. Click the Conditional Print Field link

Custom Fields & Relationships							Custom Fields & Relationships Help
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit   Replace	Alignment	SBQQ__Alignment__c	Salesforce CPQ	Picklist			Admin User, 7/6/2017 1:32 PM
Edit	Bottom Margin (px)	SBQQ__BottomMargin__c	Salesforce CPQ	Number(5, 0)			Admin User, 7/6/2017 1:32 PM
Edit	Column Heading Field	SBQQ__ColumnHeadingField__c	Salesforce CPQ	Picklist			Admin User, 7/6/2017 1:32 PM
Edit   Replace	Conditional Print Field	SBQQ__ConditionalPrintField__c	Salesforce CPQ	Picklist			Admin User, 7/6/2017 1:32 PM

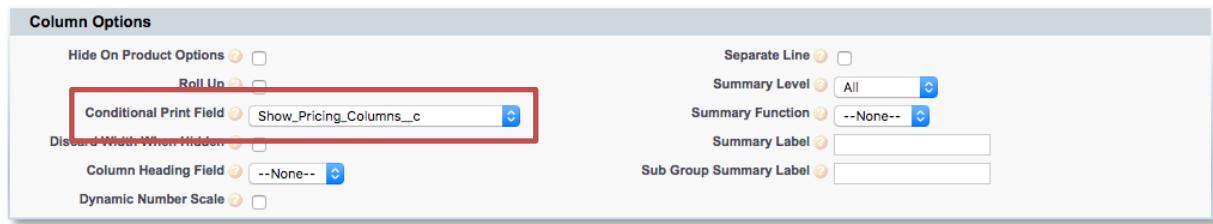
9. Click New in Values

Values						Values Help
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit   Del   Deactivate	Group Line Items	Group Line Items	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM	
Edit   Del   Deactivate	SBQQ__AdditionalDiscountAmount__c	SBQQ__AdditionalDiscountAmount__c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 10:52 AM	

10. Enter API name of the Quote Show Pricing Columns field, then Save

11. Return to the original Line Column tab and refresh the page

12. Set field value, then Save



13. Repeat steps 5, 6 and 13 for the Extended line column

## EX47: Group Subscription Lines

Objective: Separate Quote Lines into two tables, one to show only products that are one-time purchases, the other to show only subscription products.

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

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 Cloutier, 5/19/2016 12:41 PM	
Edit	Additional Disc. (%)	SBQQ__Discount__c	SteelBrick CPQ	Percent(9, 2)			Brian Cloutier, 5/19/2016 12:41 PM	

3. Choose Formula, then click Next

The screenshot shows the 'Data Type' section of a configuration wizard. It lists four options: 'None Selected', 'Auto Number', 'Formula' (which is selected and highlighted with a red box), and 'Roll-Up Summary'. A note next to 'Formula' explains it's a read-only field derived from a formula expression.

4. Enter Subscription Type as the field label, choose Text as the return type, then click Next

The screenshot shows the 'Step 2. Choose output type' screen. It displays 'Field Label' and 'Field Name' both set to 'Subscription\_Type'. Below these, there are two radio buttons: 'Percent' (selected) and 'Text'. A note explains that 'Percent' calculates a percent and adds a sign, while 'Text' creates a text string by concatenating other fields.

5. Set formula body as described below, then click Next, Next, Save

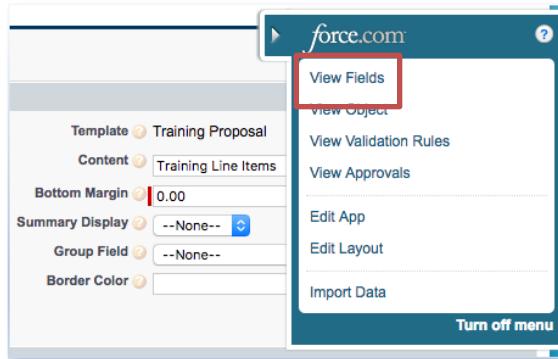
```
IF (TEXT (SBQQ__SubscriptionPricing__c) <> "", "Subscription",  
"One-Time")
```

6. Navigate to the Quote Template

7. Click Edit next to the Line Items section

Sections		New Template Section	Sections Help ?		
Action	Section Name	Content	Top Margin	Bottom Margin	Display Order
Edit   Del	Cover Page	Training Cover Page	0.00	0.00	10
Edit   Del	Cover Letter	Training Cover Letter	0.00	0.00	20
Edit   Del	Tail Header	Training Tail Header	0.00	0.00	30
Edit   Del	Prepared For	Training Prepared For	0.00	0.00	40
Edit   Del	MDQ Items	MDQ Items as Columns	0.00	0.00	45
Edit   Del	Line Items	Training Line Items	0.00	0.00	50
Edit   Del	Signature Block	Training Signature Block	0.00	0.00	70

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



9. Click the Group Field link

Edit	Filter Value	SBQQ__FilterValue__c	SteelBrick CPQ	Text(200)	Brian Cloutier, 5/19/2016 12:41 PM
Edit   Replace	Group Field	SBQQ__GroupField__c	SteelBrick CPQ	Picklist	Brian Cloutier, 5/19/2016 12:41 PM
Edit	Hide Column Header	SBQQ__ColumnHeaderHidden__c	SteelBrick CPQ	Checkbox	Brian Cloutier, 5/19/2016 12:41 PM
Edit   Replace	Keep Together	SBQQ__KeepTogether__c	SteelBrick CPQ	Picklist	Brian Cloutier, 5/19/2016 12:41 PM

10. Click New in Values

Values						Values Help ?
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit   Del   Deactivate	Product Family	Product Family	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM	
Edit   Del   Deactivate	Subscription Category	Subscription Category	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM	

11. Enter API name of the Quote Line Subscription Type field, then Save

A screenshot of the 'Values' screen. A red box highlights the input field for the API name 'Subscription\_Type\_\_c'. The field is currently empty.

12. Return to the original Template Section tab and refresh the page

13. Set field value, then Save

Information ! = Required Information

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

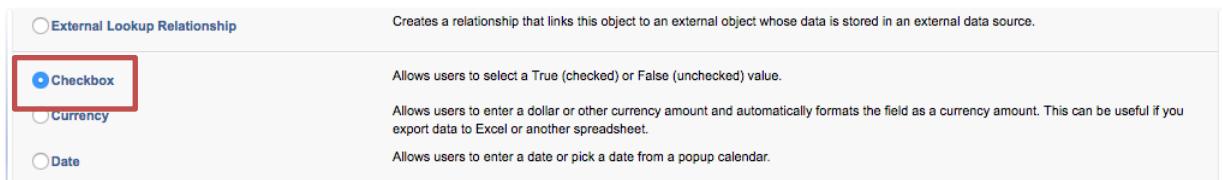
## EX50: Conditional Line Item Tables

Objective: Allow sales reps to control whether the line item table combines all line items into a single table, or separate one-time and subscription products into two tables. The custom Quote field named Separate by Subscription Type will determine if separate tables are created.

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

Custom Fields & Relationships							Custom Fields & Relationships Help		
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History	
Edit	Account	SBQQ__Account__c	SteelBrick CPQ	Lookup(Account)	✓		Brian Cloutier, 5/19/2016 12:41 PM	<input type="checkbox"/>	
Edit	Additional Disc. (%)	SBQQ__CustomerDiscount__c	SteelBrick CPQ	Percent(3, 2)			Brian Cloutier, 5/19/2016 12:41 PM	<input type="checkbox"/>	

3. Choose Checkbox, then click Next



4. Enter Separate by Subscription Type as the field label, then click Next, Next, Save

The screenshot shows the 'Field Label' field containing 'Separate by Subscription Type'. Below it, the 'Default Value' section shows 'Checked' selected (radio button highlighted with a red box). The 'Field Name' field below contains 'Separate\_by\_Subscription\_type'.

5. Click New in Custom Fields & Relationships

Custom Fields & Relationships							Custom Fields & Relationships Help		
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History	
Edit	Account	SBQQ__Account__c	SteelBrick CPQ	Lookup(Account)	✓		Brian Cloutier, 5/19/2016 12:41 PM	<input type="checkbox"/>	
Edit	Additional Disc. (%)	SBQQ__CustomerDiscount__c	SteelBrick CPQ	Percent(3, 2)			Brian Cloutier, 5/19/2016 12:41 PM	<input type="checkbox"/>	

6. Choose Formula then click Next

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula** A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

7. Enter Combine Subscription Type as the field label, choose Checkbox as the return type, then click Next

**Step 2. Choose output type** Step 2 of 5

Field Label | **Combine Subscription Type** | Field Name | **Combine\_Subscription\_Type** | [i](#)

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

**Formula Return Type**

- None Selected Select one of the data types below.
- Checkbox** Calculate a boolean value  
Example: `TODAY() > CloseDate`

8. Set formula body as described below, then click Next, Next, Save

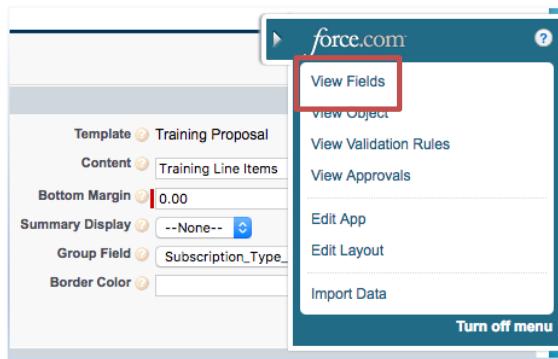
```
IF (Separate_by_Subscription_Type__c, FALSE, TRUE)
```

9. Navigate to the Quote Template

10. Click Edit next to the Line Items section

Sections		New Template Section	Sections Help <a href="#">?</a>		
Action	Section Name	Content	Top Margin	Bottom Margin	Display Order
Edit   Del	Cover Page	Training Cover Page	0.00	0.00	10
Edit   Del	Cover Letter	Training Cover Letter	0.00	0.00	20
Edit   Del	Tail Header	Training Tail Header	0.00	0.00	30
Edit   Del	Prepared For	Training Prepared For	0.00	0.00	40
Edit   Del	MDQ Items	MDQ Items as Columns	0.00	0.00	45
Edit   Del	Line Items	Training Line Items	0.00	0.00	50
Edit   Del	Signature Block	Training Signature Block	0.00	0.00	70

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



12. Click the Conditional Print Field link

Custom Fields & Relationships							Custom Fields & Relationships Help
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit	Border Color	SBQQ__BorderColor__c	SteelBrick CPQ	Text(6)			Brian Cloutier, 5/19/2016 12:41 PM
Edit	Bottom Margin	SBQQ__BottomMargin__c	SteelBrick CPQ	Number(12, 2)			Brian Cloutier, 5/19/2016 12:41 PM
Edit   Replace	Conditional Print Field	SBQQ__ConditionalPrintField__c	SteelBrick CPQ	Picklist			Brian Cloutier, 5/19/2016 12:41 PM
Edit	Content	SBQQ__Content__c	SteelBrick CPQ	Lookup(Template Content)	✓		Brian Cloutier, 5/19/2016 12:41 PM

13. Click New in Values

Values						Values Help
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit   Del   Deactivate	Group Line Items	Group Line Items	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM	
Edit   Del   Deactivate	Primary	Primary	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM	
Edit   Del   Deactivate	Show_Cover_Page__c	Show_Cover_Page__c	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 11:16 AM	

14. Enter API names of the custom Quote fields, then Save

A screenshot of the Values screen. The 'New' button is highlighted with a red box. In the input field, two API names are listed: 'Separate\_by\_Subscription\_Type\_\_c' and 'Combine\_Subscription\_Type\_\_c', both of which are also highlighted with a red box.

15. Return to the original Template Section tab and refresh the page

16. Set field value, then Save

Information

Section Name: Line Items

Top Margin: 0.00

Display Order: 50

Conditional Print Field: Separate\_by\_Subscription\_Type\_\_c

Print Quote Totals:

Roll-Up Field: --None--

Hide Column Header:

Template: Training Proposal

Content: Training Line Items

Bottom Margin: 0.00

Summary Display: --None--

Group Field: Subscription\_Type\_\_c

Border Color:

= Required Information

17. Click Line Items section link

Action	Section Name	Content	Top Margin	Bottom Margin	Display Order
Edit   Del	Cover Page	Training Cover Page	0.00	0.00	10
Edit   Del	Cover Letter	Training Cover Letter	0.00	0.00	20
Edit   Del	Tail Header	Training Tail Header	0.00	0.00	30
Edit   Del	Prepared For	Training Prepared For	0.00	0.00	40
Edit   Del	MDO Items	MDQ Items as Columns	0.00	0.00	45
Edit   Del	<b>Line Items</b>	Training Line Items	0.00	0.00	50
Edit   Del	Signature Block	Training Signature Block	0.00	0.00	70

18. Click the Clone button

Template Section Detail

Action: Edit | Delete | **Clone** | Include Document

Section Name: Line Items

Top Margin: 0.00

Display Order: 50

Conditional Print Field: Separate\_by\_Subscription\_Type\_\_c

Template: Training Proposal

Content: Training Line Items

Bottom Margin: 0.00

Summary Display: None

19. Update fields, then Save

Information

Section Name: Combined Line Items

Top Margin: 0.00

Display Order: 51

Conditional Print Field: Separate\_by\_Subscription\_Type\_\_c

Print Quote Totals:

Roll-Up Field: --None--

Hide Column Header:

Template: Training Proposal

Content: Training Line Items

Bottom Margin: 0.00

Summary Display: --None--

Group Field: --None--

Border Color:

= Required Information

## EX52: Quote Terms Section

Objective: Display premade quote terms on a new page in the generated proposal, beginning with premade header content, and located immediately before the signature block.

1. Navigate to the Template Content tab
2. Click New

The screenshot shows the 'Template Content' interface. At the top left is a 'Home' icon. Below it are buttons for 'View: All' and 'Go!'. To the right are links for 'Edit | Create New View' and 'Help for this Page'. The main area is titled 'Recent Template Content'. It lists two items: 'Training Net Amount Total' and 'Training Discount Amount Total'. At the top right of this list is a red-bordered 'New' button. To the right of the list is a 'Recently Viewed' section with a dropdown arrow. At the bottom right of the content area is a 'Recently Viewed' section with a dropdown arrow.

3. Choose Quote Terms, then click Continue

This is a modal dialog box titled 'Type of this content.' It contains five radio button options: 'HTML', 'Line Items', 'Quote Terms' (which is selected and highlighted with a red box), 'Custom', 'Template Bottom', and 'Template Top'. At the bottom are 'Continue' and 'Cancel' buttons.

4. Set field value, then Save

The screenshot shows the 'Template Content' edit screen. It has fields for 'Content Name' (set to 'Quote Terms' and highlighted with a red box), 'Font Family' (set to 'None'), and 'Text Color' (set to white). On the right, there's a 'Type' field set to 'Quote Terms' and a 'Font Size' field which is empty. A note at the top right says '= Required Information'.

5. Navigate to the Quote Template
6. Click New Template Section in Template Sections

The screenshot shows the 'Sections' table in the 'Template Sections' screen. The columns are 'Action', 'Section Name', 'Content', 'Top Margin', 'Bottom Margin', and 'Display Order'. It lists two sections: 'Cover Page' (Content: 'Training Cover Page', Top Margin: 0.00, Bottom Margin: 0.00, Display Order: 10) and 'Cover Letter' (Content: 'Training Cover Letter', Top Margin: 0.00, Bottom Margin: 0.00, Display Order: 20). At the top right of the table is a red-bordered 'New Template Section' button. There is also a 'Sections Help' link at the top right.

7. Set field values, then click Save & New

Information

Section Name	Terms Header
Top Margin	0.00
Display Order	60
Conditional Print Field	None
Print Quote Totals	<input type="checkbox"/>
Roll-Up Field	--None--
Hide Column Header	<input type="checkbox"/>

Template

Content	Training Proposal
Bottom Margin	0.00
Summary Display	--None--
Group Field	--None--
Border Color	[Color Box]

Page Breaks

Page Break	Before
Keep With Previous	None

Keep Together

Keep With Next	Auto
----------------	------

Keep With Next

Keep With Next	Auto
----------------	------

8. Set field values, then Save

Information

Section Name	Quote Terms
Top Margin	0.00
Display Order	61
Conditional Print Field	None
Print Quote Totals	<input type="checkbox"/>
Roll-Up Field	--None--
Hide Column Header	<input type="checkbox"/>

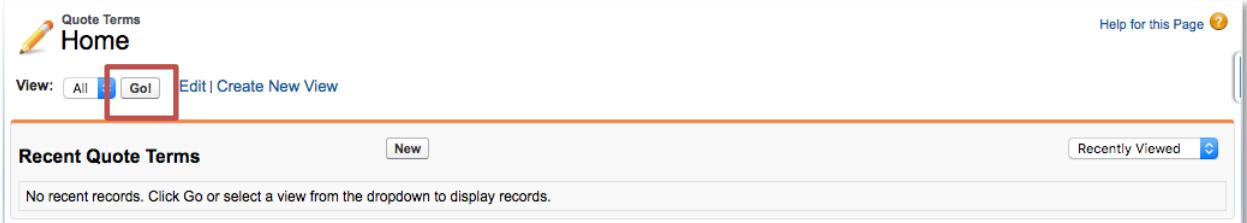
Template

Content	Training Proposal
Bottom Margin	0.00
Summary Display	--None--
Group Field	--None--
Border Color	[Color Box]

## EX53: Quote Term with Merge Field

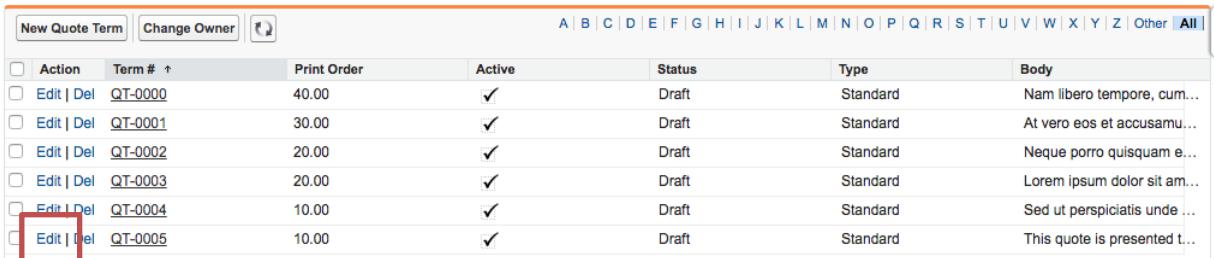
Objective: Update an existing quote term to include the Quote Billing Name and Expiration Date information, inline with static text.

1. Navigate to the Quote Terms tab
2. Click Go!



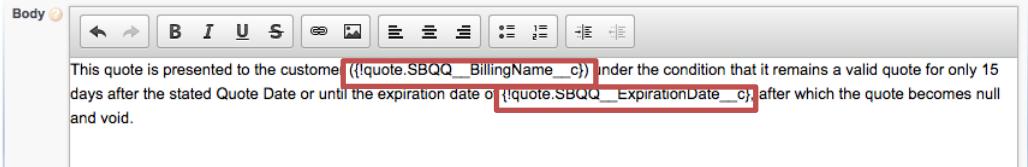
The screenshot shows the 'Quote Terms' home page. At the top, there's a navigation bar with 'View: All' and a 'Go!' button, which is highlighted with a red box. Below the navigation is a section titled 'Recent Quote Terms' with a 'New' button. A message says 'No recent records. Click Go or select a view from the dropdown to display records.' On the right, there's a 'Recently Viewed' dropdown menu.

3. Click Edit next to the term beginning with "This quote is presented..."



Action	Term #	Print Order	Active	Status	Type	Body
<input type="checkbox"/> Edit   Del	QT-0000	40.00	✓	Draft	Standard	Nam libero tempore, cum...
<input type="checkbox"/> Edit   Del	QT-0001	30.00	✓	Draft	Standard	At vero eos et accusamu...
<input type="checkbox"/> Edit   Del	QT-0002	20.00	✓	Draft	Standard	Neque porro quisquam e...
<input type="checkbox"/> Edit   Del	QT-0003	20.00	✓	Draft	Standard	Lorem ipsum dolor sit am...
<input type="checkbox"/> Edit   Del	QT-0004	10.00	✓	Draft	Standard	Sed ut persipciatis unde ...
<input type="checkbox"/> Edit   Del	QT-0005	10.00	✓	Draft	Standard	This quote is presented t...

4. Update the term body to include the highlighted text, then Save



The screenshot shows the 'Body' field of a quote term. The text contains two merge fields: {{!quote.SBQQ\_BillingName\_c}} and {{!quote.SBQQ\_ExpirationDate\_c}}. These fields are highlighted with red boxes. The text also includes a note about the quote becoming null and void after 15 days from the stated quote date or expiration date.

## EX54: Conditional Quote Term

Objective: Configure a quote term so that it only appears in the generated document when the Quote field named Status is equal to 'Draft', 'In Review', or 'Denied'.

1. Navigate to the Quote Terms tab
2. Click New

The screenshot shows a list of quote terms. A single row is selected, highlighting the term 'QT-0005'. The row contains columns for 'Term #', 'Status', 'Print Order', 'Type', and 'Body'. The 'Body' column displays a conditional quote message. A red box highlights the 'New' button at the top right of the list area.

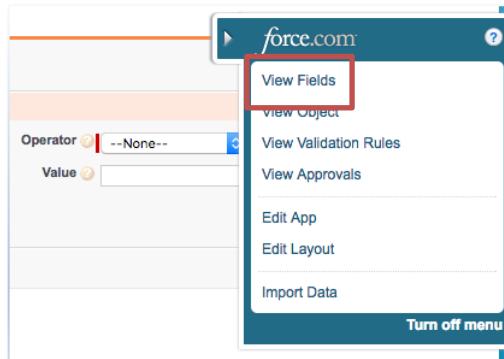
3. Set field values, then Save

The screenshot shows the 'Information' tab for a new quote term. It includes fields for 'Print Order' (set to 50), 'Status' (set to 'Draft'), 'Active' (checked), 'Owner' (set to 'Brian Cloutier'), 'Quote' (empty), 'Standard Term' (empty), and 'Template Content' (empty). The 'Body' section contains rich text tools and a message: 'This quote is presented in a non-finalized form, and may be subject to further revision before a finalized quote is produced.' A red box highlights the 'Print Order' field, the 'Status' dropdown, the 'Active' checkbox, and the 'Body' message.

4. Click New Term Condition in Term Conditions

The screenshot shows the 'Term Conditions' and 'Sub Terms' tabs. Both tabs have a 'New [Tab Name] Condition' button highlighted with a red box. The 'Term Conditions' tab also has a 'Term Conditions Help' link. The 'Sub Terms' tab has a 'Sub Terms Help' link.

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



6. Click the Tested Field link

Custom Fields & Relationships							
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit	Index	SBQQ__Index__c	SteelBrick CPQ	Number(6, 0)			Brian Cloutier, 5/19/2016 12:41 PM
Edit   Replace	Operator	SBQQ__Operator__c	SteelBrick CPQ	Picklist			Brian Cloutier, 5/19/2016 12:41 PM
Edit	Quote Term	SBQQ__QuoteTerm__c	SteelBrick CPQ	Master-Detail(Quote Term)	✓		Brian Cloutier, 5/19/2016 12:41 PM
Edit   Replace	Tested Field	SBQQ__TestedField__c	SteelBrick CPQ	Picklist			Brian Cloutier, 5/19/2016 12:41 PM
Edit	Tested Variable	SBQQ__TestedVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	✓		Brian Cloutier, 5/19/2016 12:41 PM
Edit	Value	SBQQ__Value__c	SteelBrick CPQ	Text(255)			Brian Cloutier, 5/19/2016 12:41 PM

7. Click New in Values

Values					
Action	Values	API Name	Default	Chart Colors	Modified By
Edit   Del   Deactivate	List Amount	List Amount	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM
Edit   Del   Deactivate	Regular Amount	Regular Amount	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM
Edit   Del   Deactivate	Customer Amount	Customer Amount	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM
Edit   Del   Deactivate	Net Amount	Net Amount	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/6/2017 1:32 PM

8. Enter API name of the Quote Status field, then Save

9. Return to the original Term Condition tab and refresh the page

Set field values, then Save

## EX33: Create a Contract and Renewal Opportunity

Objective: Allow Salesforce CPQ to create a Contract record based on an Opportunity that contains subscription products. On the Contract record, Subscription records will be created automatically. Then, allow Salesforce CPQ to create a renewal Opportunity that represents the potential future sale of a continued subscription.

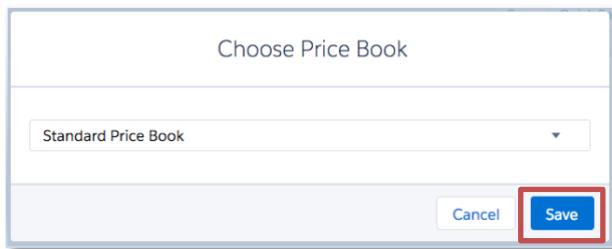
1. Navigate to the Account created on the first day
2. Click New Opportunity in Opportunities
3. Set field values, then Save

The screenshot shows the 'Opportunity Information' section of the Salesforce interface. It includes fields for Opportunity Owner (Brian Cloutier), Private status, Opportunity Name (Second Big Sale), Account Name (Bluth Company), Type (None), Lead Source (None), Amount, Close Date (1/31/2016 [1/18/2016]), Next Step, Stage (Proposal/Price Quote), and Probability (%). A red box highlights the Opportunity Name and Close Date fields.

4. Click New Quote in Quotes
5. Set field values, then Save

The screenshot shows the 'Information' section for a new quote. It includes fields for Primary (checked), Status (Draft), Expires On (2/17/2016 [1/18/2016]), Sales Rep, Primary Contact, Subscription Term (36), Delivery Method (None), Master Contract, Opportunity (Second Big Sale), Type (Quote), Payment Terms (Net 30), and Start Date (2/1/2016 [1/18/2016]). A red box highlights the Primary checkbox, Start Date, and Subscription Term fields.

6. Click Save to Choose Price Book popup



7. Click Add Products



8. Choose the following Products, then click Select

Product Selection

4 Products Found

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

9. Save the Quote



10. Return to the Opportunity

11. Set field values, then Save

Opportunity Detail

Save Cancel

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

▼ SteelBrick Information

Primary Quote Q-00001 Contracted

12. Refresh the opportunity page

13. Click the Contract Number link in Contracts

Quotes

New Quote

Action	Quote Number	Net Amount	Status	Created By	Primary
Edit   Del	<a href="#">Q-00001</a>	\$2,760.00	Draft	Brian Cloutier, 1/18/2016 9:06 AM	

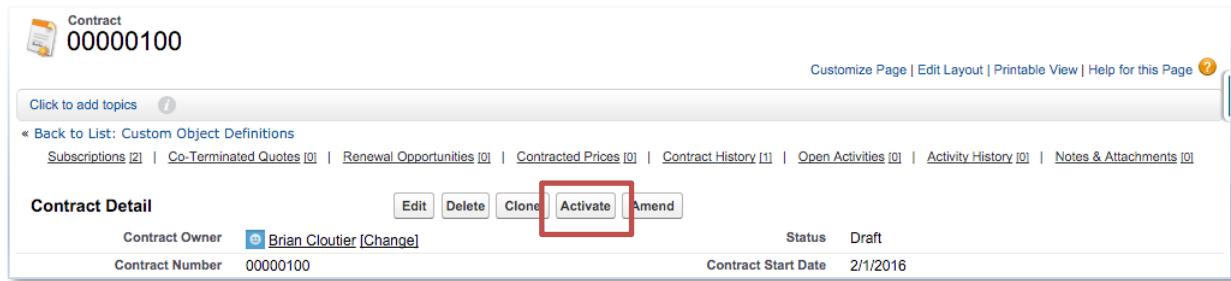
Contracts

New Contract

Contracts Help

Action	Contract Number	Status	Account Name	Contract Start Date	Contract End Date	Contract Term (months)
Edit   Del	<a href="#">00000100</a>	Draft	Bluth Company	2/1/2016	1/31/2019	36

14. Click the Activate button



15. Click OK if a warning popup appears

16. Navigate back to the Contract

17. Set field values, then Save

The screenshot shows the 'SteelBrick Information' screen. It has a section titled 'Renewal Forecast' with a checked checkbox and a 'Save' button. Below it is a section for 'Renewal Opportunity Stage' with the value 'Proposal/Price Quote' highlighted in red. There are also 'Renewal Quoted' and 'Renewal Opportunity' sections. At the bottom, there's a 'Subscriptions' table with two rows:

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

## EX34: Create Amendment Opportunity and Quote

Objective: Use the amend functionality to update an existing Contract to include higher quantities of subscription products, prorated for the remaining duration of the Contract. Salesforce CPQ will automatically create an amendment Opportunity and Quote during this process. When the amendment Opportunity is flagged 'contracted' the Renewal Opportunity from EX38 is automatically updated.

1. Navigate to the original Contract
2. Click Amend

The screenshot shows the 'Contract Detail' section for Contract 00000100. The 'Amend' button is highlighted with a red box. Other buttons visible are 'Edit', 'Delete', and 'Clone'. The page includes links for Subscriptions, Co-Terminated Quotes, Renewal Opportunities, Contracted Prices, Contract History, Open Activities, Activity History, and Notes & Attachments. The contract details listed are: Contract Owner (Brian Cloutier), Contract Number (00000100), Account Name (Bluth Company), Customer Signed By, Customer Signed Title, Customer Signed Date, Status (Activated), Contract Start Date (2/1/2016), Contract End Date (1/31/2019), Contract Term (months) (36), Owner Expiration Notice, and Company Signed By.

3. Click Amend on subscription preview page

The screenshot shows the 'Amend Contract' preview page. It lists two subscription items: 'SUB-0000000' (Admin Hour) and 'SUB-0000001' (Cloud Storage 1GB). The 'Amend' button is highlighted with a red box.

4. Set start date, adjust quantity, then Calculate

The screenshot shows the 'Quote Information' page. It includes fields for Start Date (8/1/2016), Subscription Term, and Target Customer Amount. A table displays product details: Product Code, Product Name, Quantity, List Unit Price, Regular Unit Price, Unit Cost, Markup, Additional Disc., Net Unit Price, and Net Total. The table shows two items: Admin Hour (Quantity 10.00) and Cloud Storage 1GB (Quantity 1.00). The 'Save' button is highlighted with a red box.

5. Save the Quote

The screenshot shows the save buttons for the quote: 'Save', 'Quick Save', and 'Cancel'. The 'Save' button is highlighted with a red box.

6. Navigate to the Amendment Opportunity

7. Set field values, then Save

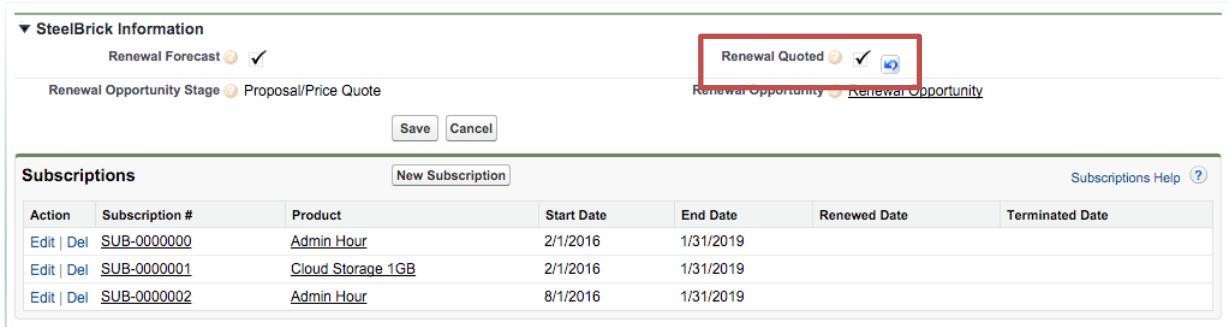
Opportunity Detail

Opportunity Detail		Save	Cancel
Opportunity Owner	Brian Cloutier [Change]	Amount	\$20,250.00
Private	<input type="checkbox"/>	Expected Revenue	\$2,025.00
Opportunity Name	Amendment for contract #00000100	Close Date	1/18/2016
Account Name	Bluth Company	Next Step	
Type		Stage	Closed Won 
Lead Source		Probability (%)	100 
Created By	Brian Cloutier, 1/18/2016 10:14 AM	Primary Campaign Source	
Description		Last Modified By	Brian Cloutier, 1/18/2016 10:19 AM
Custom Links	<a href="#">Delivery Status</a>		
<b>▼ SteelBrick Information</b>			
Primary Quote	 Q-00003	Contracted  ✓ 	

## EX35: Create a Renewal Quote

Objective: Allow Salesforce CPQ to create a Quote record on the renewal Opportunity from EX38. This quote will include Opportunity Products from the renewal Opportunity, and may be further modified, just like any other quote.

1. Navigate to the Contract
2. Set Renewal Quoted, then Save



The screenshot shows the 'SteelBrick Information' section of a Salesforce CPQ interface. At the top, there are two checkboxes: 'Renewal Forecast' (unchecked) and 'Renewal Quoted' (checked). Below these are buttons for 'Save' and 'Cancel'. A red box highlights the 'Renewal Quoted' checkbox. To the right of the checkbox, there is a link labeled 'Renewal Opportunity' with a blue arrow icon. The main area displays a table titled 'Subscriptions' with three rows of data. The columns are: Action, Subscription #, Product, Start Date, End Date, Renewed Date, and Terminated Date. The data is as follows:

Action	Subscription #	Product	Start Date	End Date	Renewed Date	Terminated Date
Edit   Del	SUB-00000000	Admin Hour	2/1/2016	1/31/2019		
Edit   Del	SUB-00000001	Cloud Storage 1GB	2/1/2016	1/31/2019		
Edit   Del	SUB-00000002	Admin Hour	8/1/2016	1/31/2019		

