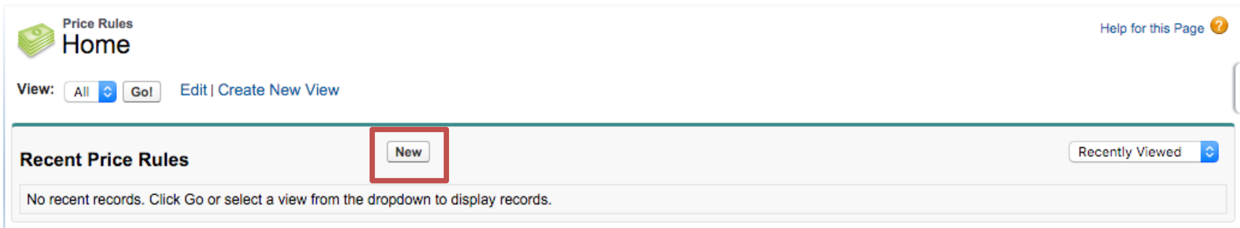
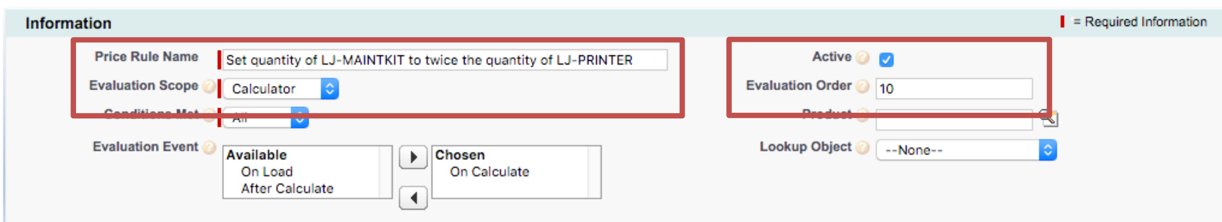
EX26: Maintenance Kit Price Rule

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

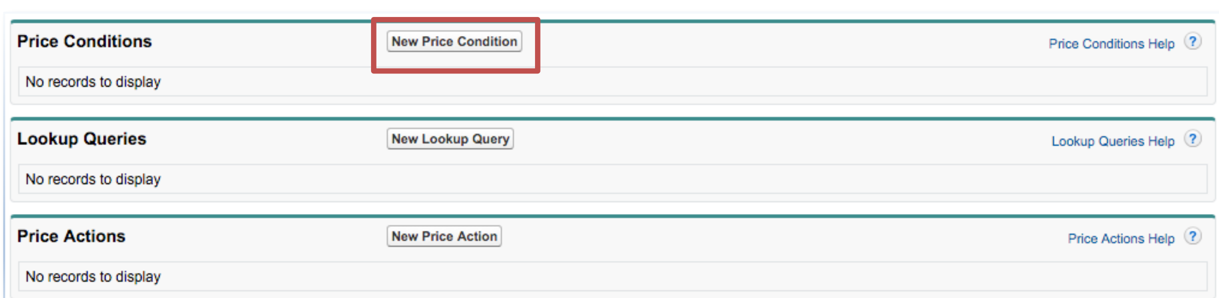
1. Navigate to the Price Rules tab
2. Click New



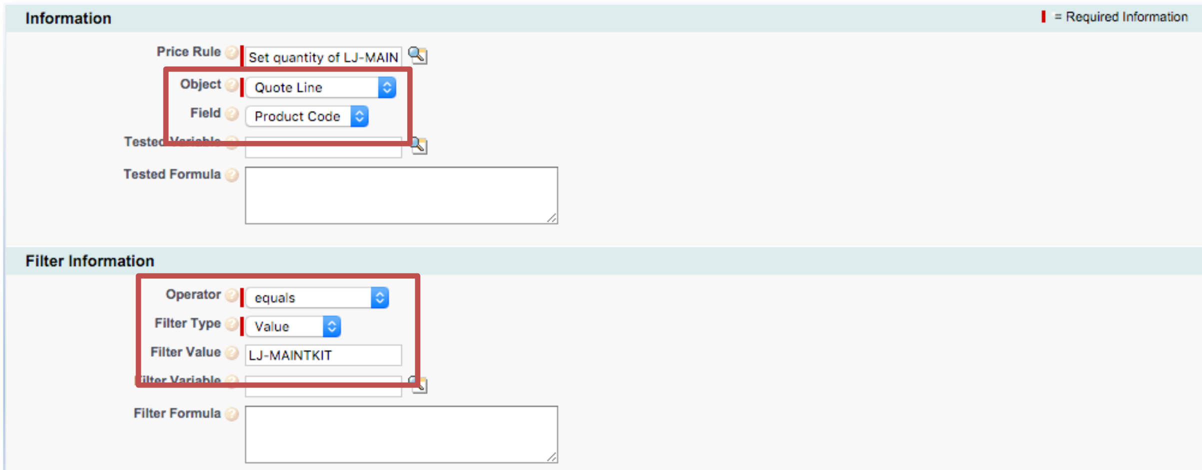
3. Set field values, then Save



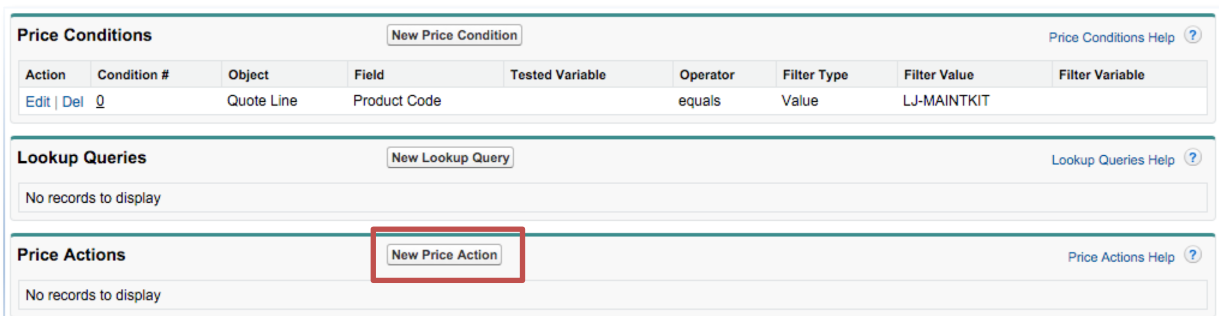
4. Click New Price Condition in Price Conditions



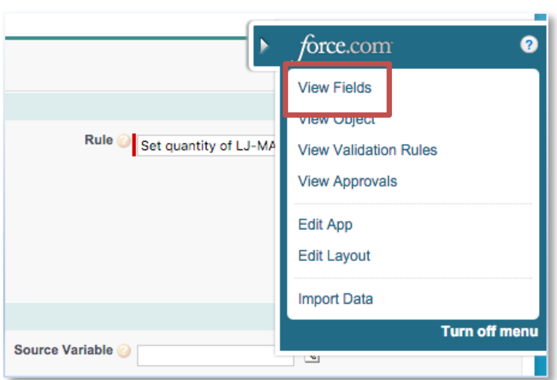
5. Set field values, then Save



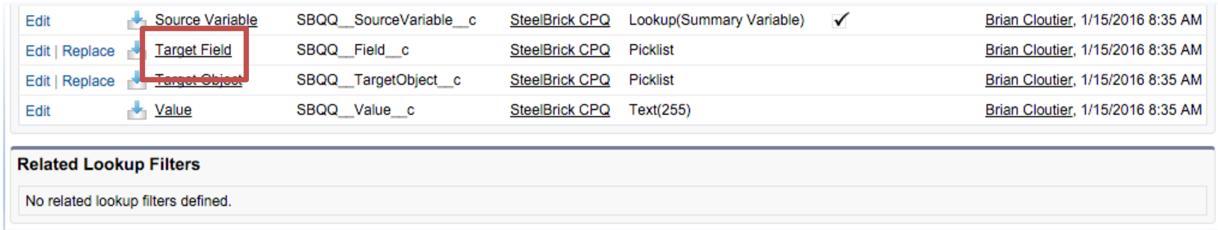
6. Navigate back to the Price Rule
7. Click New Price Action in Price Actions



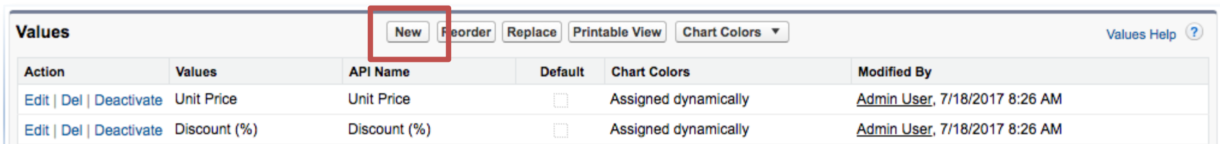
8. Open the Force.com Quick Access Menu, then click View Fields



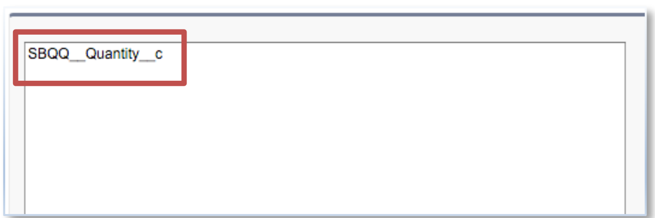
9. Click the Target Field link



10. Click New in Values



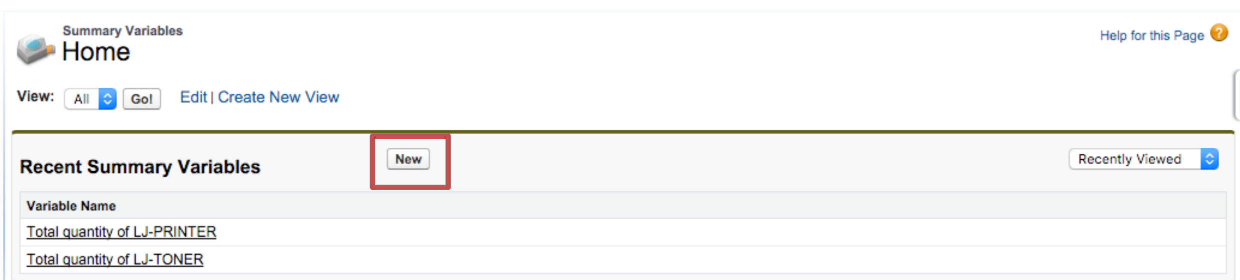
11. Enter API name of the Quote Line Quantity field, then Save



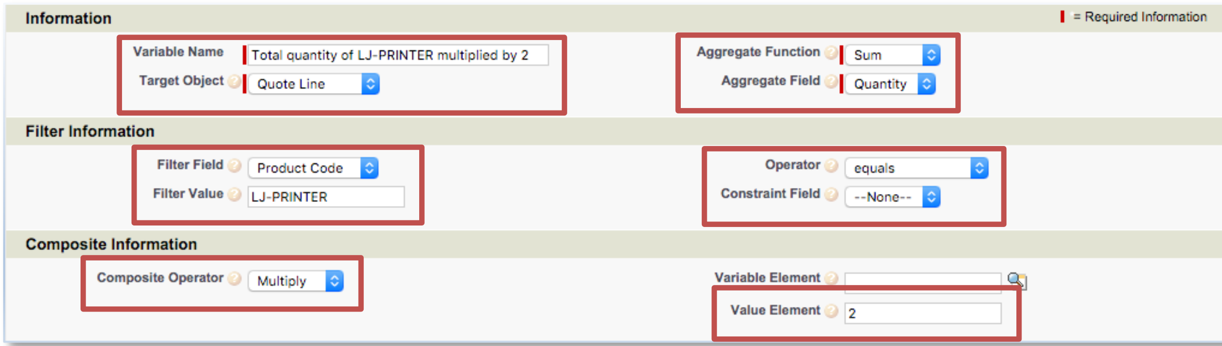
12. Return to the original Price Action tab and refresh the page

13. In a new tab, navigate to Summary Variables

14. Click New

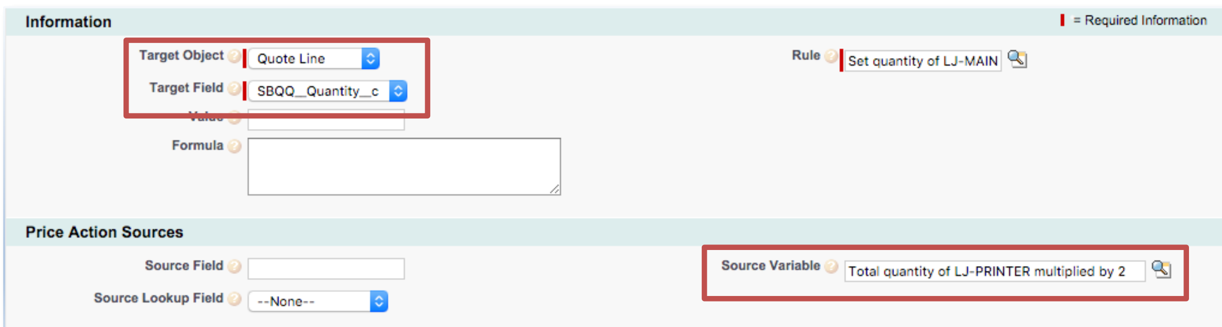


15. Set field values, then Save



16. Return to the original Price Action tab

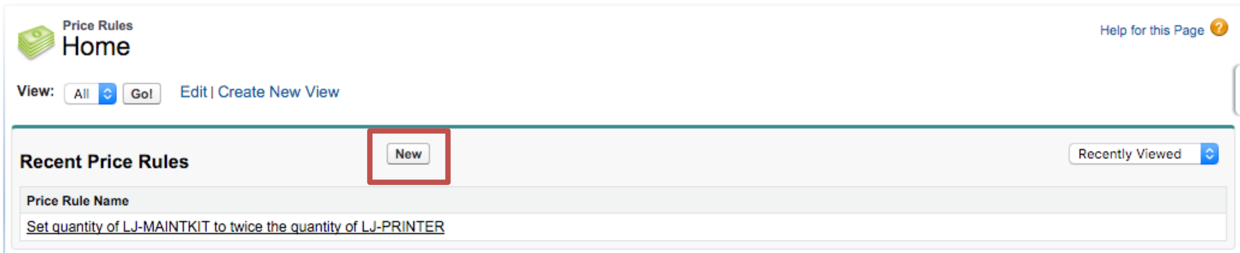
17. Set field values, then Save



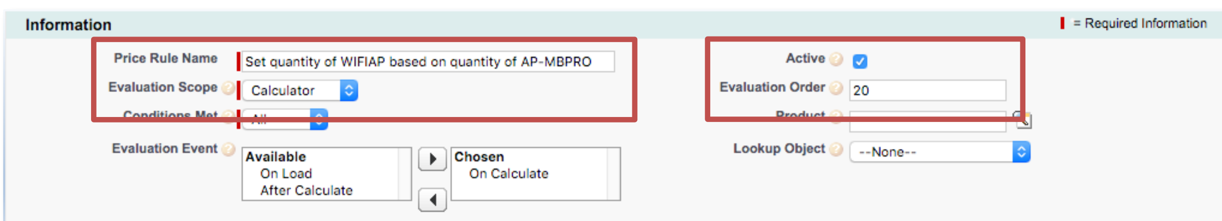
EX27: WiFi Access Point Price Rule

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.

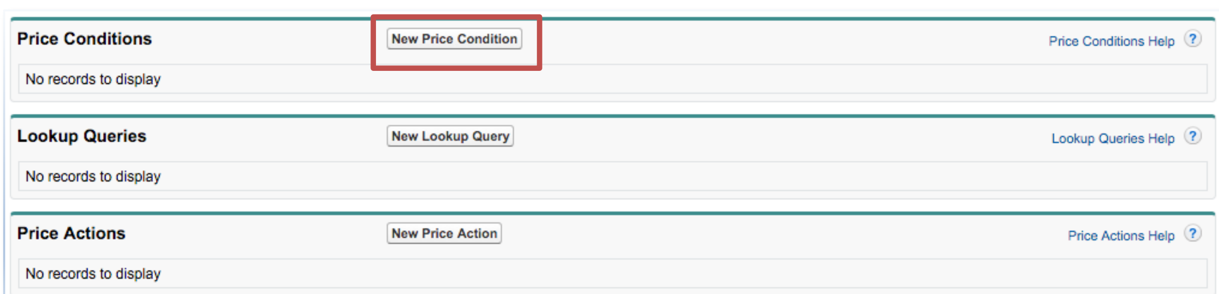
1. Navigate to the Price Rules tab
2. Click New



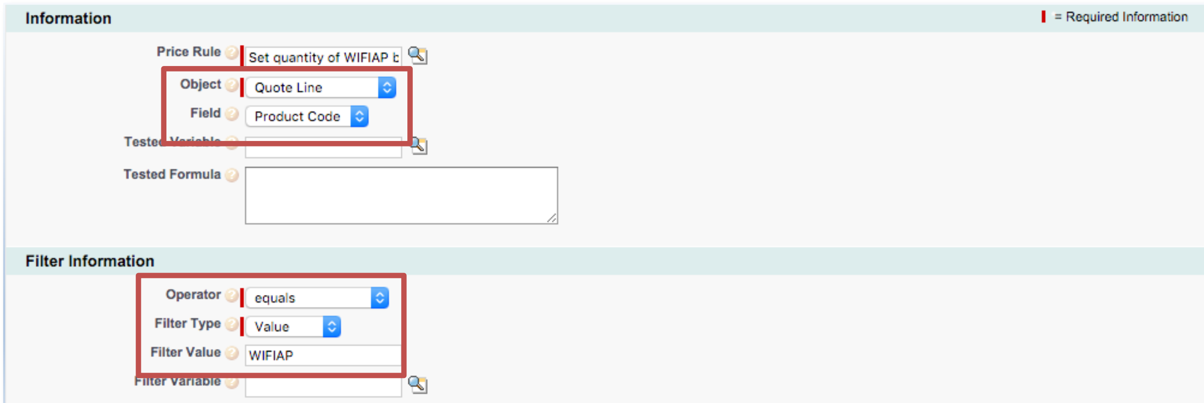
3. Set field values, then Save



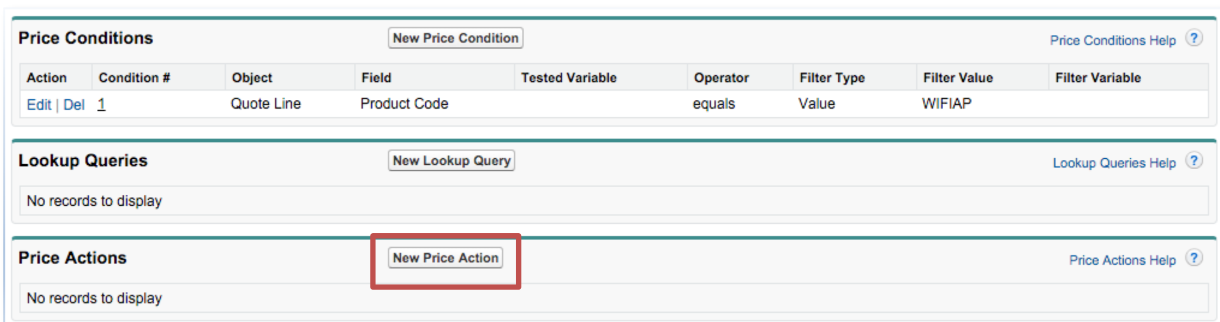
4. Click New Price Condition in Price Conditions



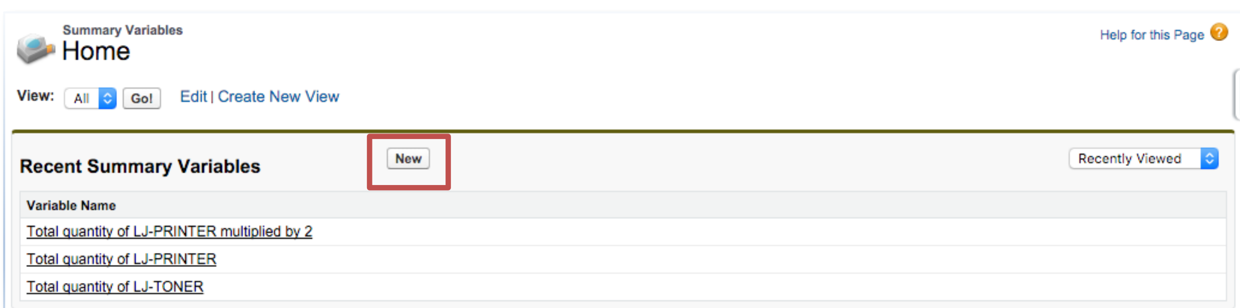
5. Set field values, then Save



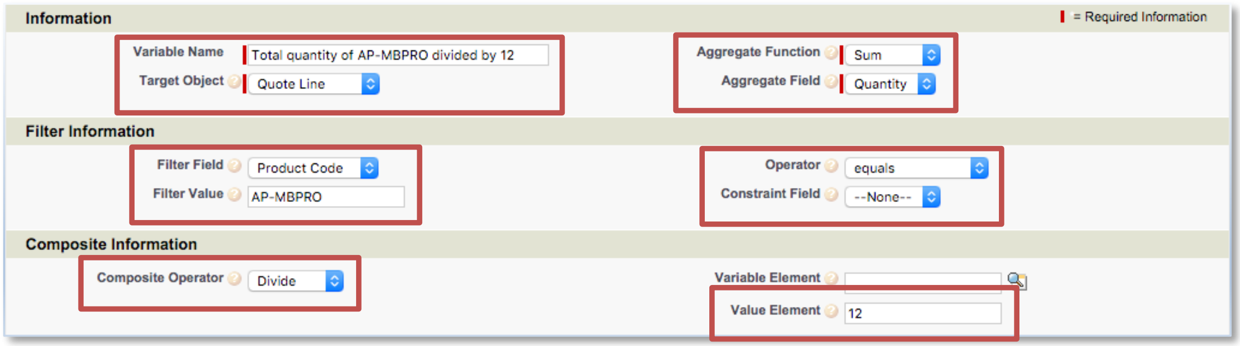
6. Navigate back to the Price Rule
7. Click New Price Action in Price Actions



8. In a new tab, navigate to Summary Variables
9. Click New



10. Set field values, then Save



11. Return to the original Price Action tab

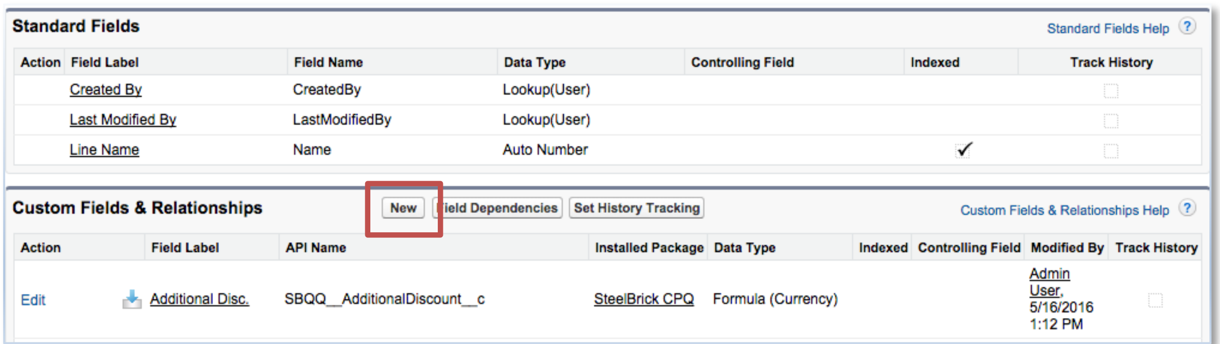
12. Set field values, then click Save & New

13. Set field values, then Save

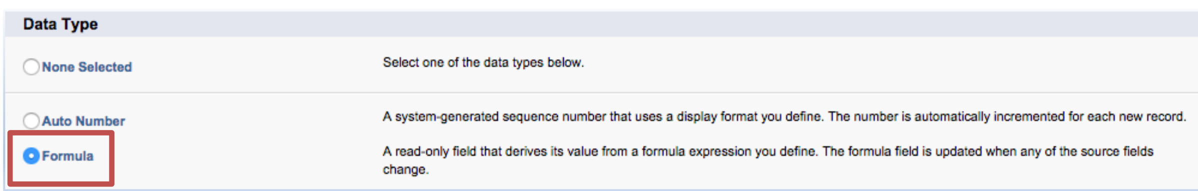
EX28: Total Cost of Hardware Price Rule

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.

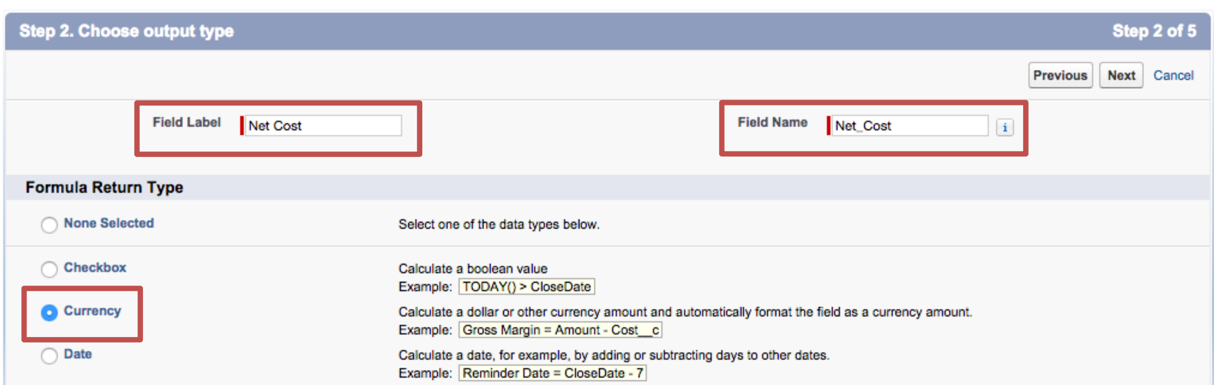
1. Navigate to Setup | Create | Objects | Quote Line
2. Click New in Custom Fields & Relationships



3. Choose Formula then click Next



4. Set field values, then click Next

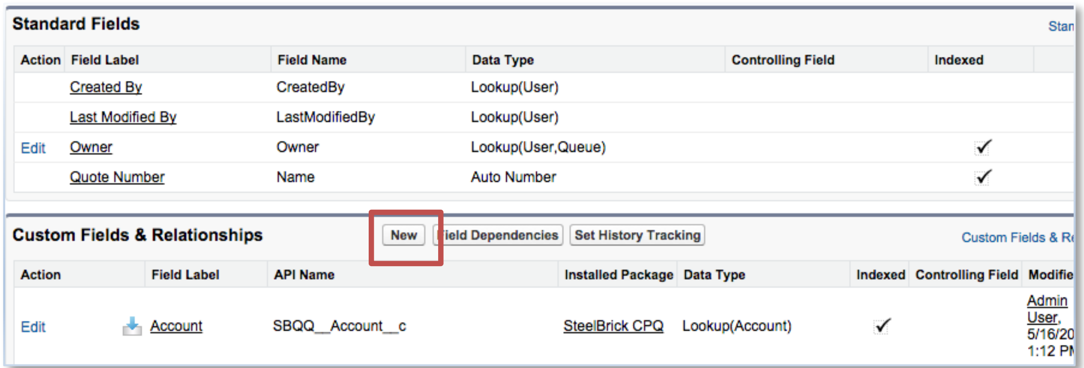


5. Set formula as described below, then click Next, Next, Save

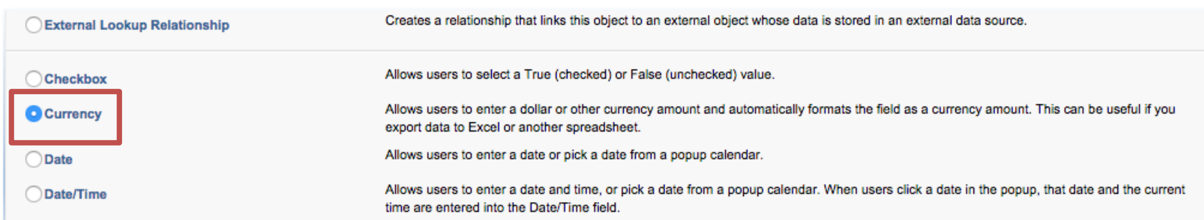
```
SBQQ__Cost__r.SBQQ__UnitCost__c * SBQQ__Quantity__c
```

6. Navigate to Setup | Create | Objects | Quote

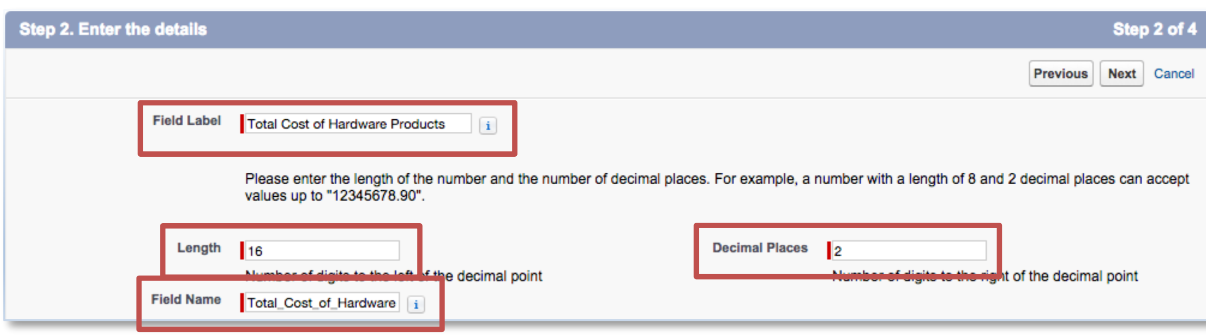
7. Click New in Custom Fields & Relationships



8. Choose Currency then click Next

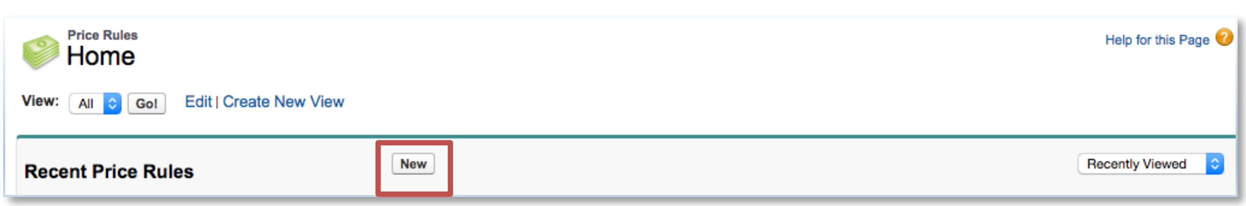


9. Set field values, then click Next, Next, Save

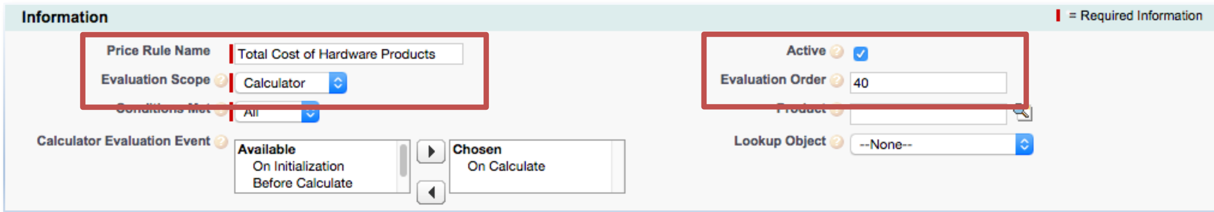


10. Navigate to the Price Rules tab

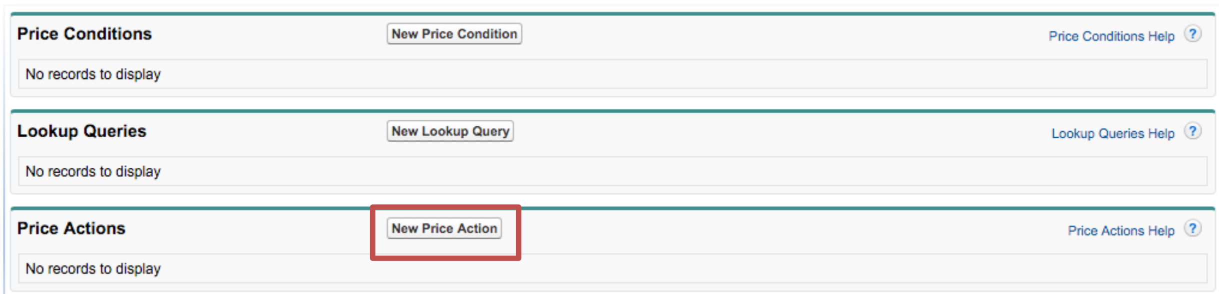
11. Click New



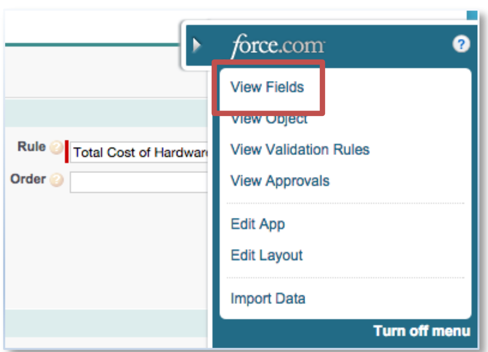
12. Set field values, then Save



13. Click New Price Action in Price Actions

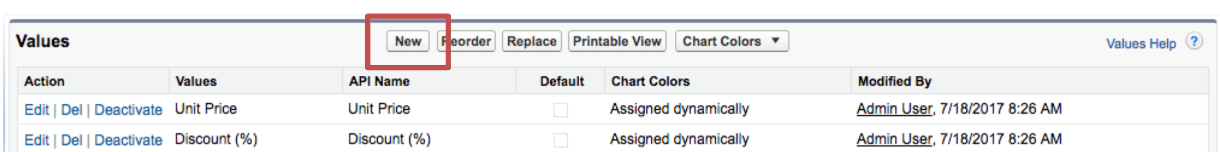


14. Open the Force.com Quick Access Menu, then click View Fields

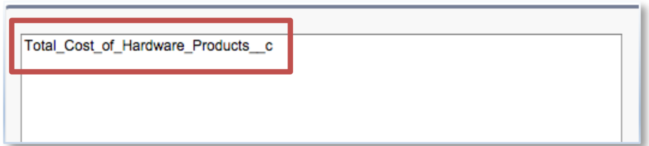


15. Click the Target Field link

16. Click New in Values



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

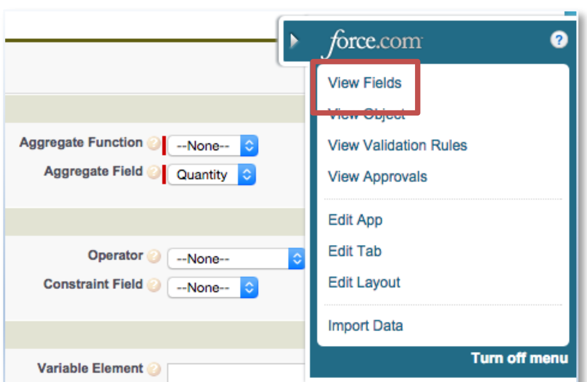


18. Return to the original Price Action tab and refresh the page

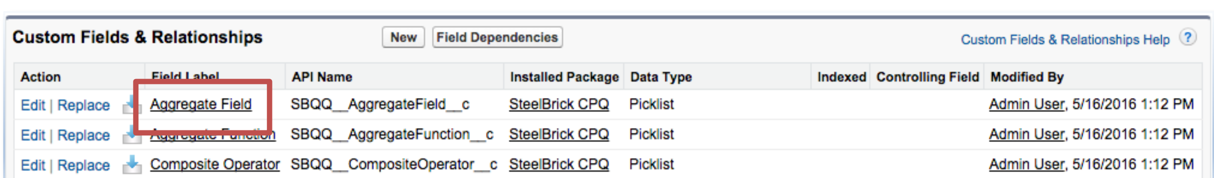
19. In a new tab, navigate to Summary Variables

20. Click New

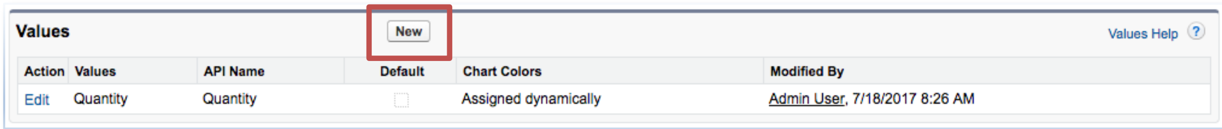
21. Open the Force.com Quick Access Menu, then click View Fields



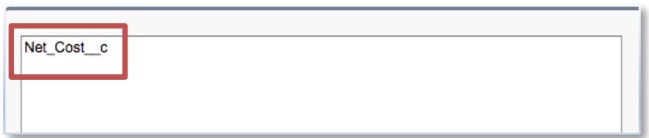
22. Click the Aggregate Field link



23. Click New in Values

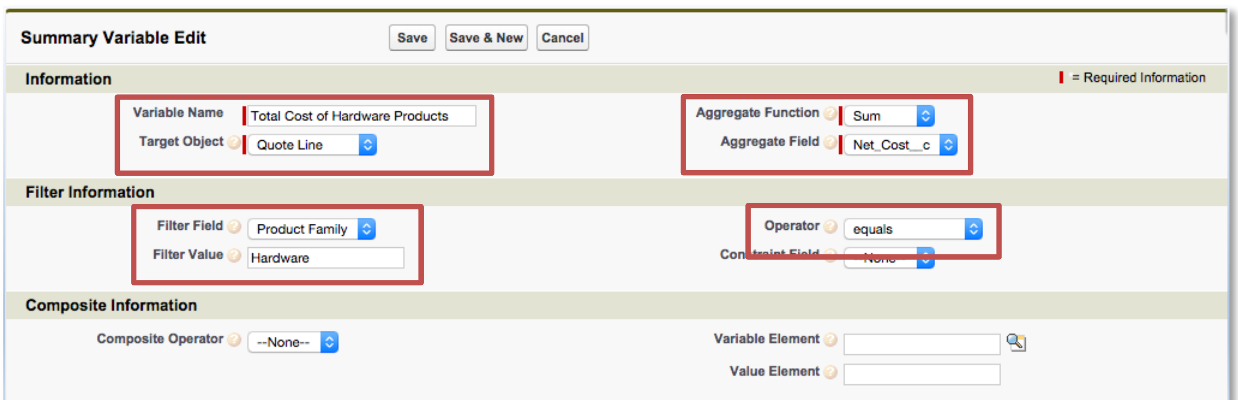


24. Enter API name of the new Quote Line Field, then Save



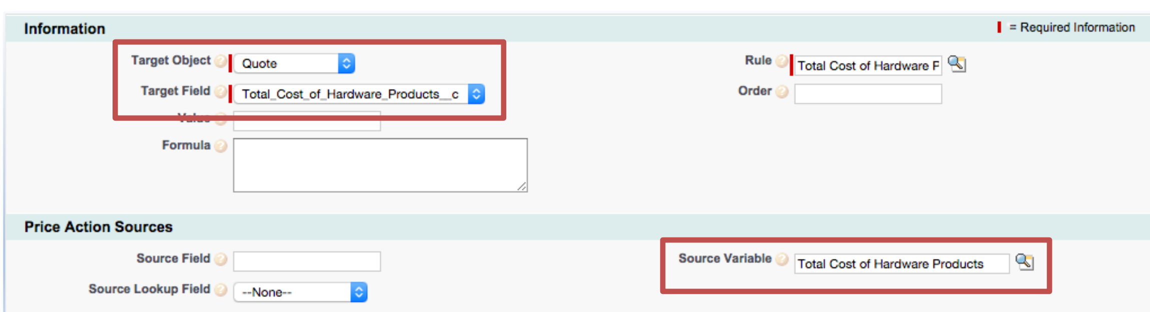
25. Return to the original Summary Variables tab and refresh the page

26. Set field values, then Save



27. Return to the original Price Action tab

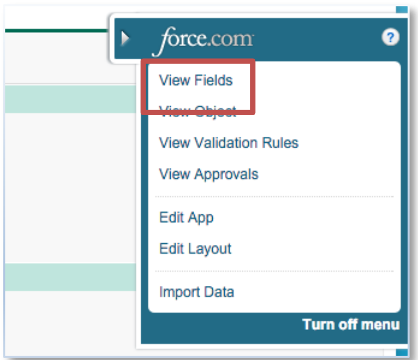
28. Set field values, then Save



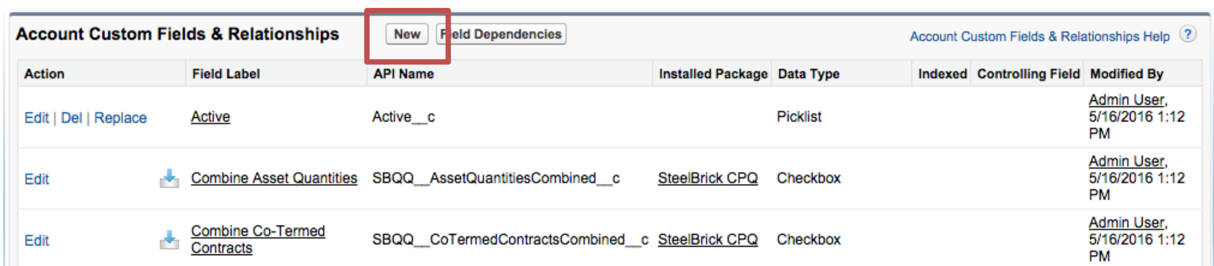
EX29: Partner Discount Price Rule

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.

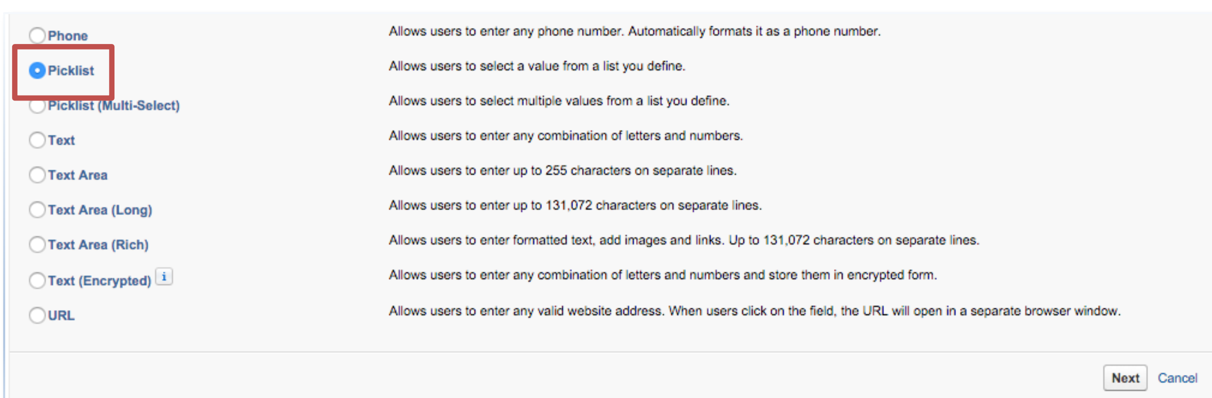
1. Navigate to an Account and open the Force.com Quick Access Menu, then click View Fields



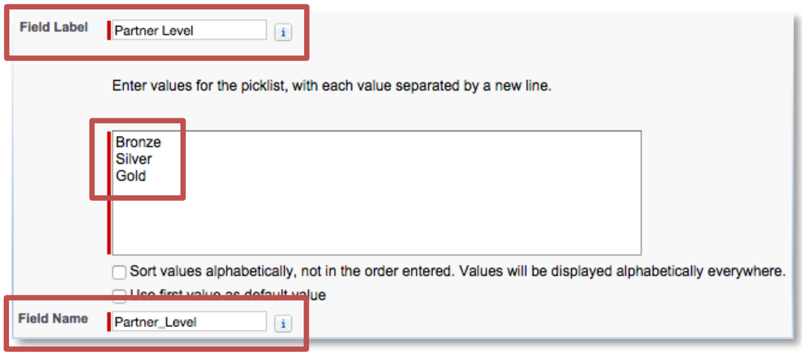
2. Click New in Custom Fields & Relationships



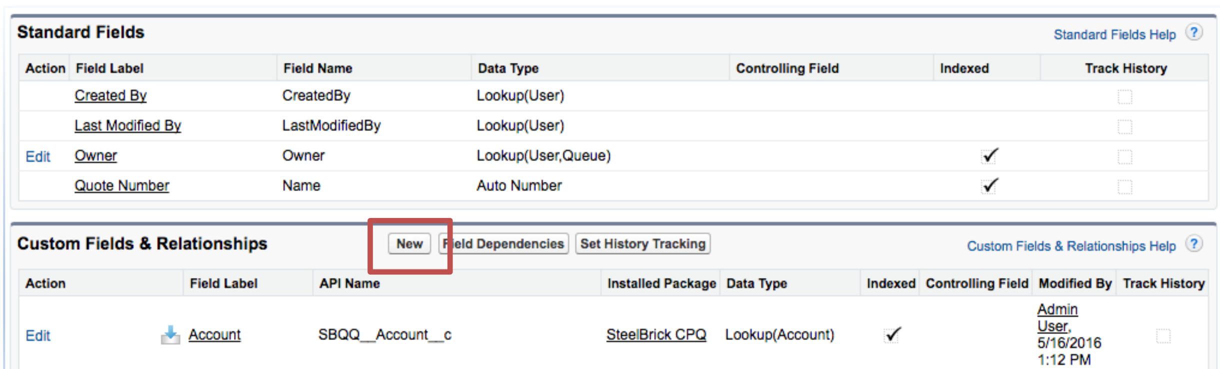
3. Choose Picklist then click Next



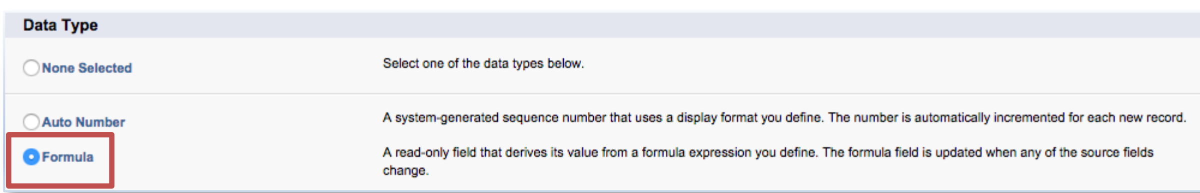
4. Set field values, add Picklist values, then click Next, Next, Save



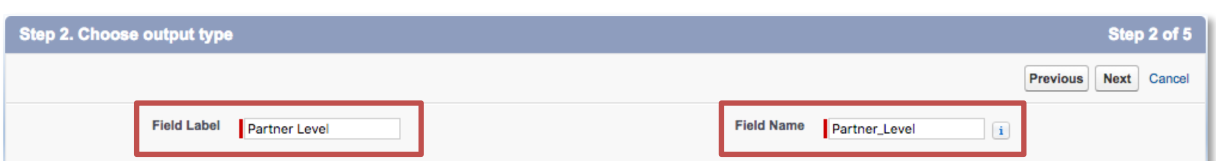
5. Navigate to Setup | Create | Objects | Quote
6. Click New in Custom Fields & Relationships

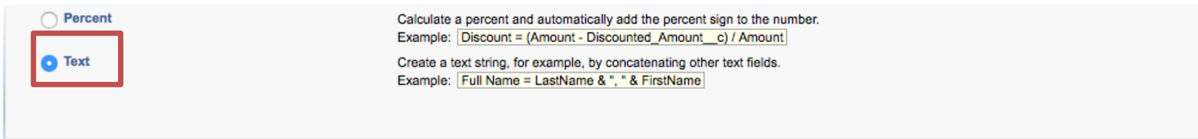


7. Choose Formula then click Next



8. Set field values, then click Next



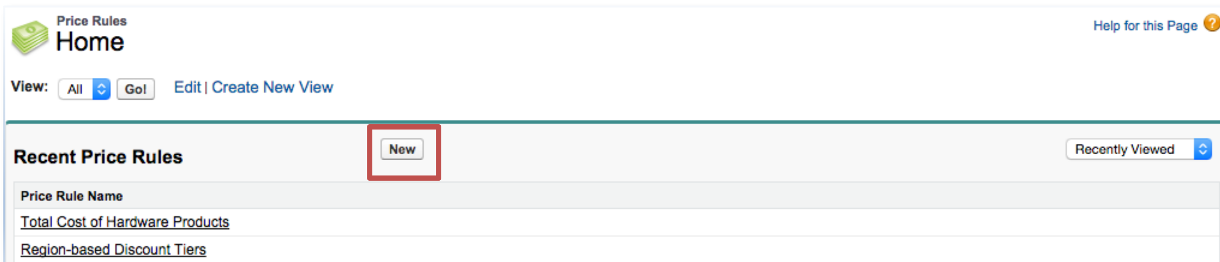


9. Set formula as described below, then click Next, Next, Save

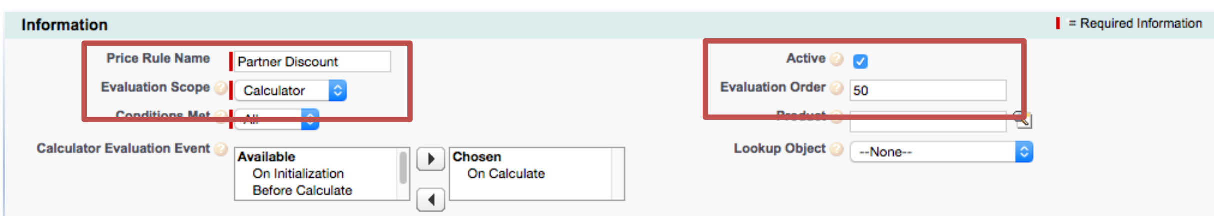
```
TEXT(SBQQ__Account__r.Partner_Level__c)
```

10. Navigate to the Price Rules tab

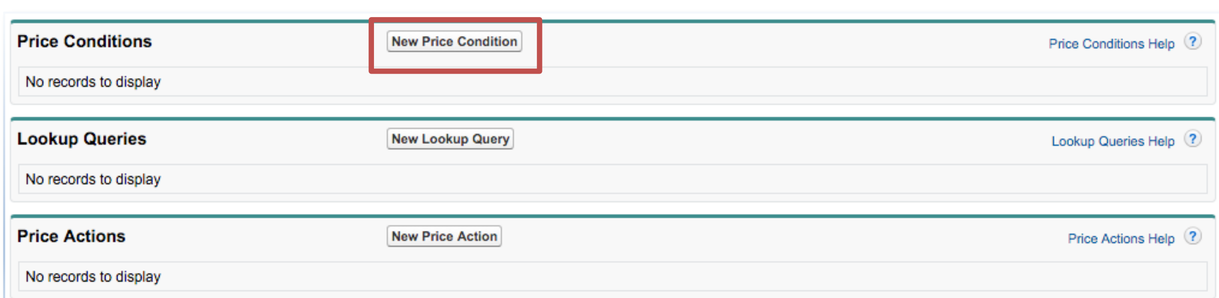
11. Click New



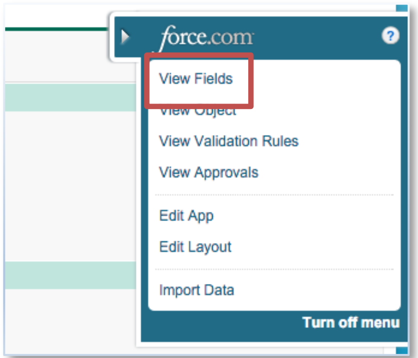
12. Set field values, then Save



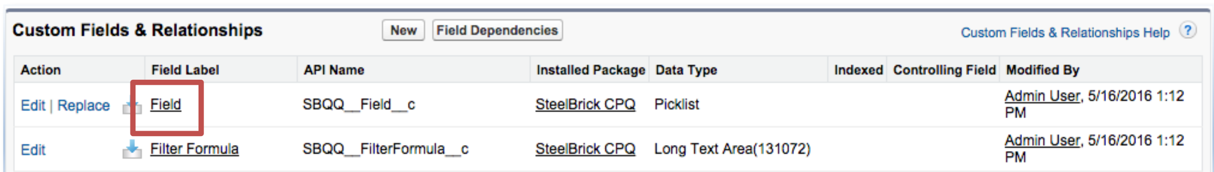
13. Click New Price Condition in Price Conditions



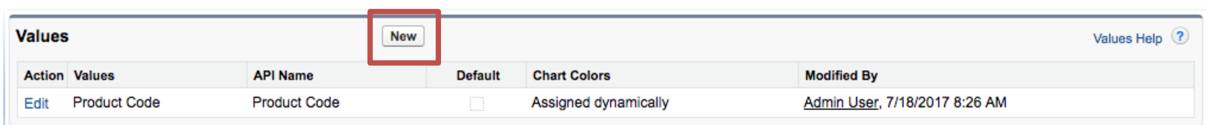
14. Open the Force.com Quick Access Menu, then click View Fields



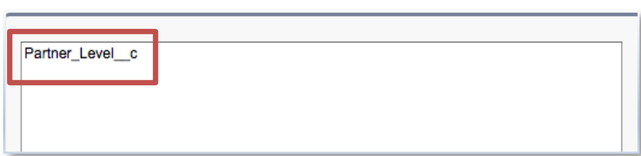
15. Click the Field link



16. Click New in Values

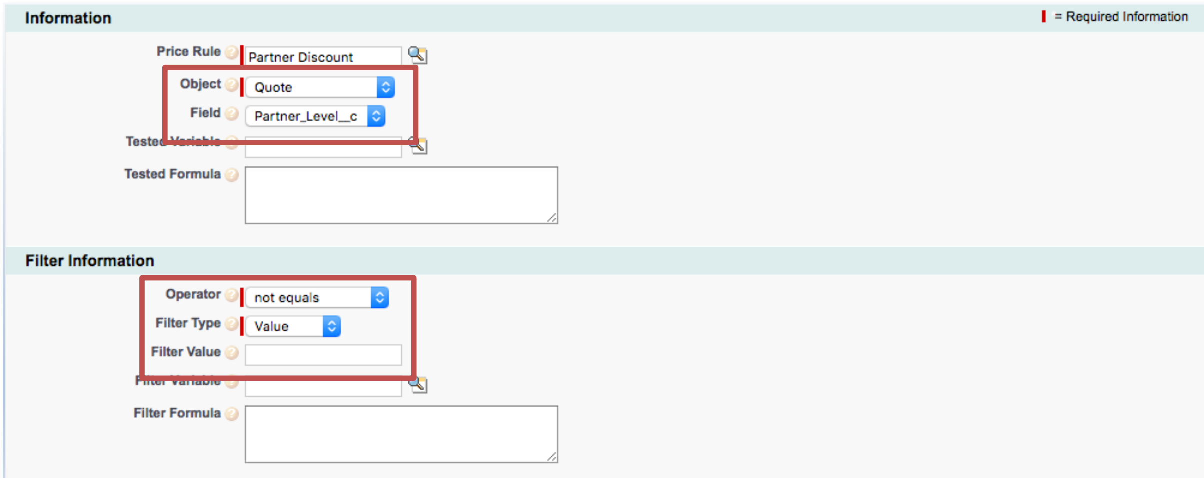


17. Enter API name of new Quote field, then Save



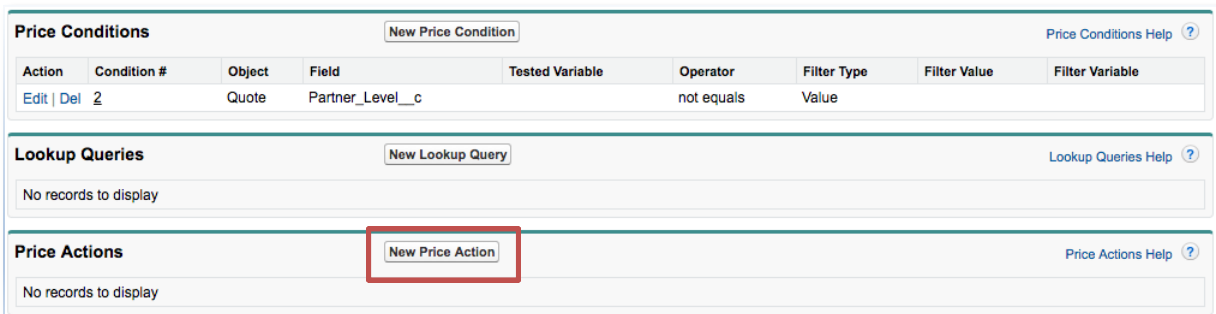
18. Return to the original Price Condition tab and refresh the page

19. Set field values, click Save

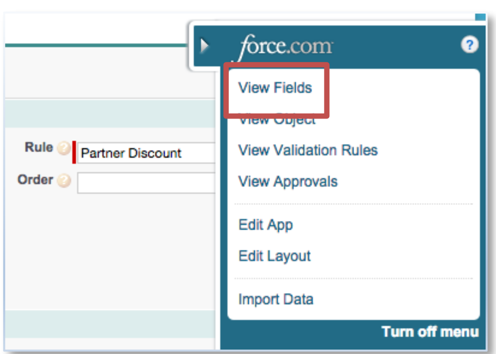


20. Navigate back to the Price Rule

21. Click New Price Action in Price Actions

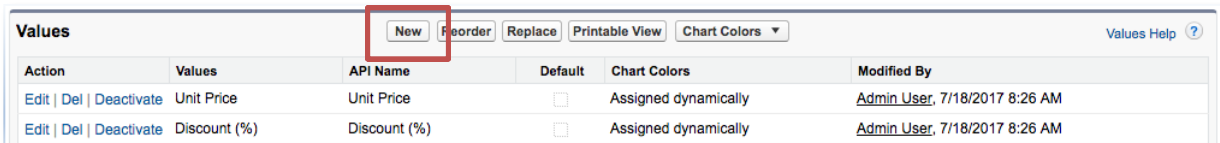


22. Open the Force.com Quick Access Menu, then click View Fields

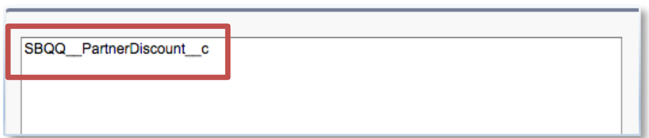


23. Click the Target Field link

24. Click New in Values



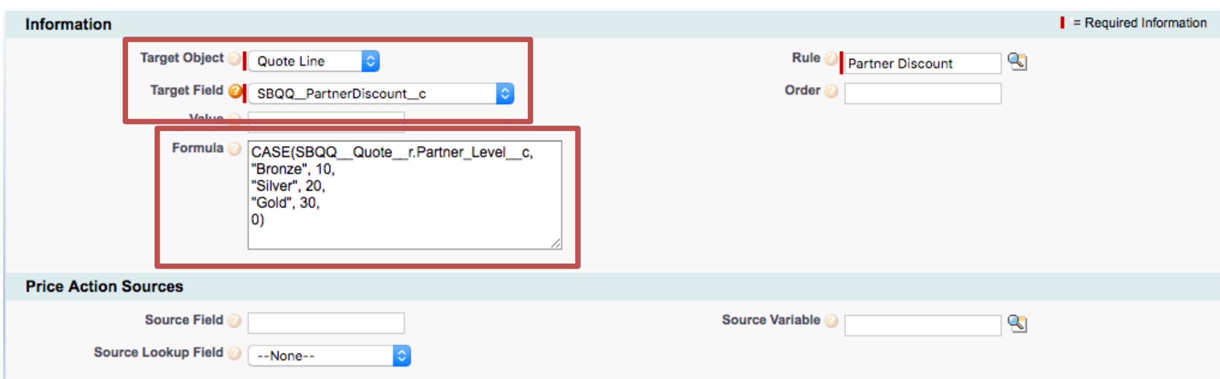
25. Enter API name of the Quote Line Partner Discount field, then Save



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

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

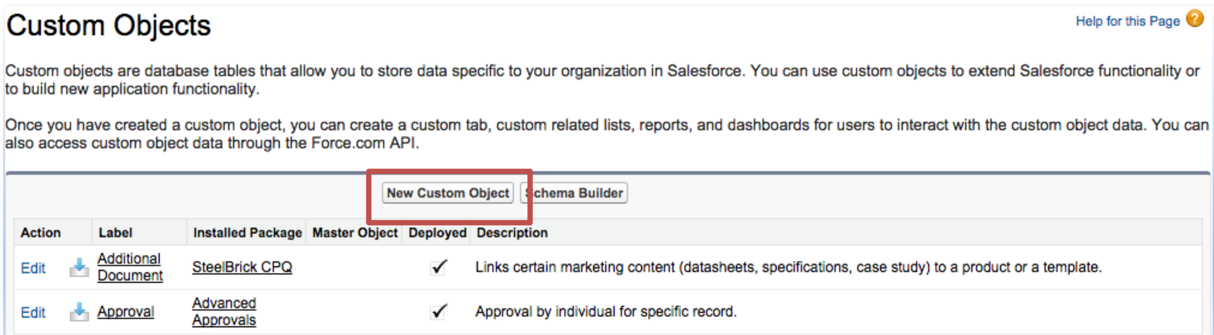
```
CASE(SBQQ__Quote__r.Partner_Level__c,"Bronze",10,"Silver",20,"Gol
d",30)
```



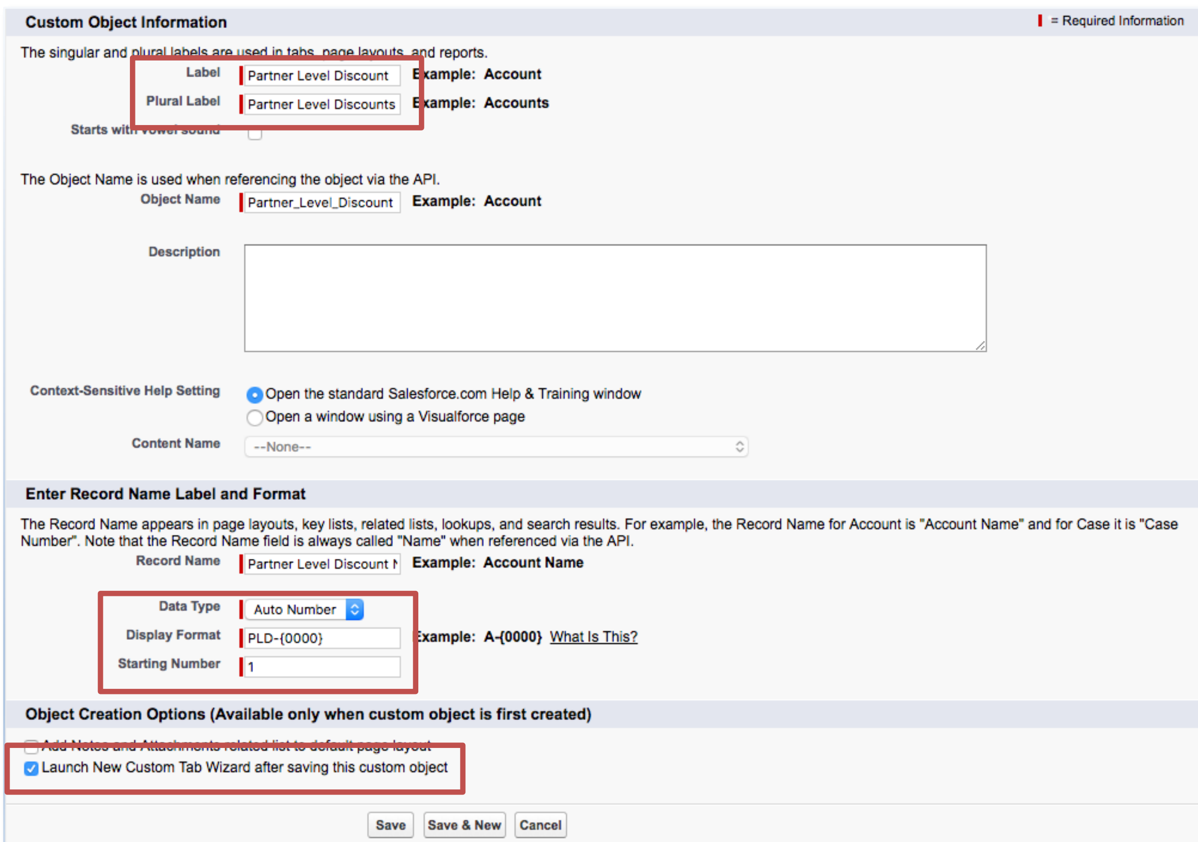
EX30: Create a Lookup Object

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

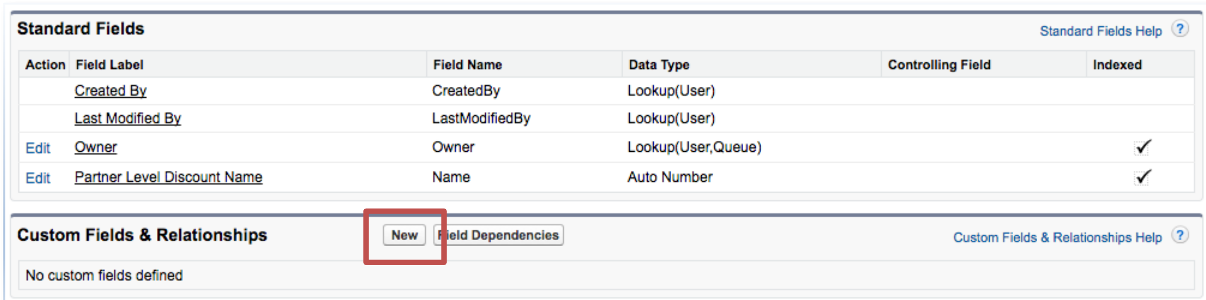


3. Set field values, then Save

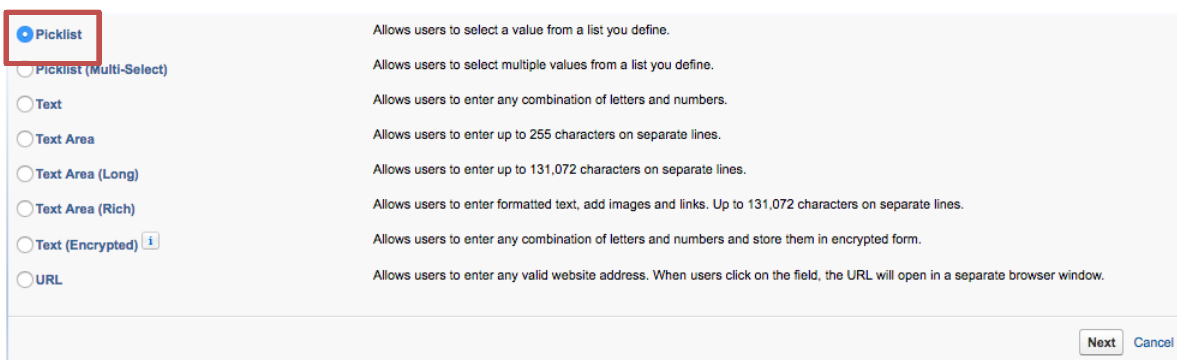


4. Set field values, then click Next, Next, Save

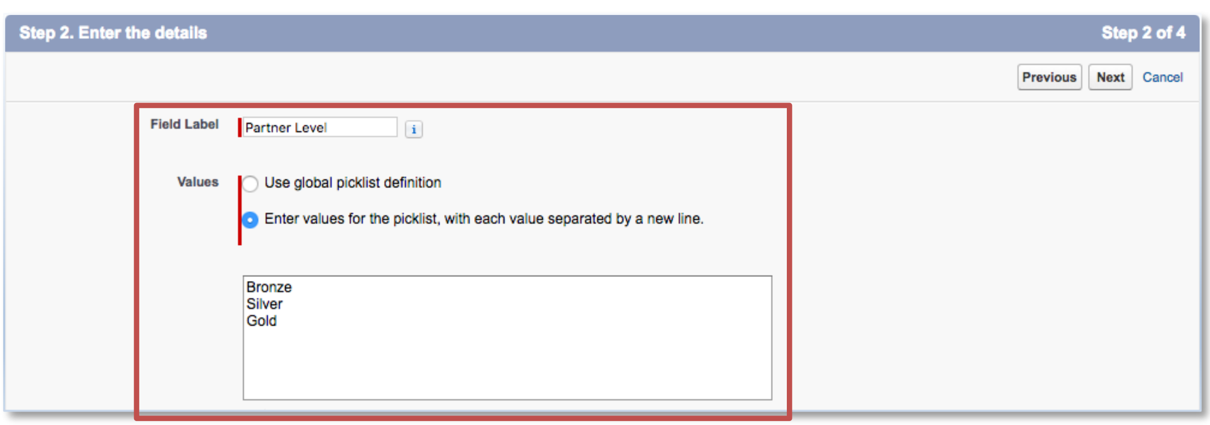
5. Click New in Custom Fields & Relationships



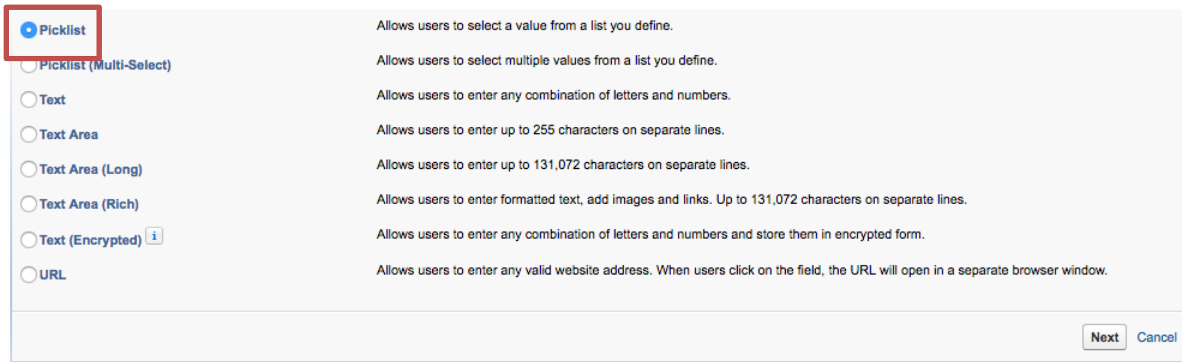
6. Choose Picklist then click Next



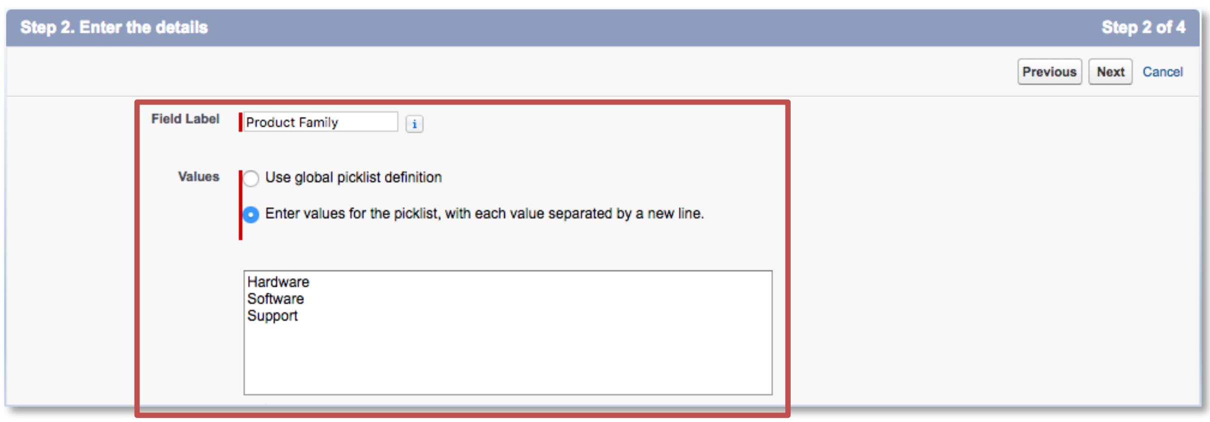
7. Set field values, click Next, Next, then click Save & New



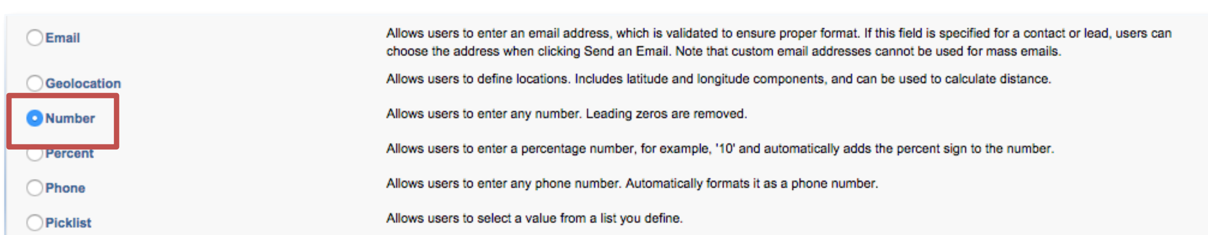
8. Choose Picklist then click Next



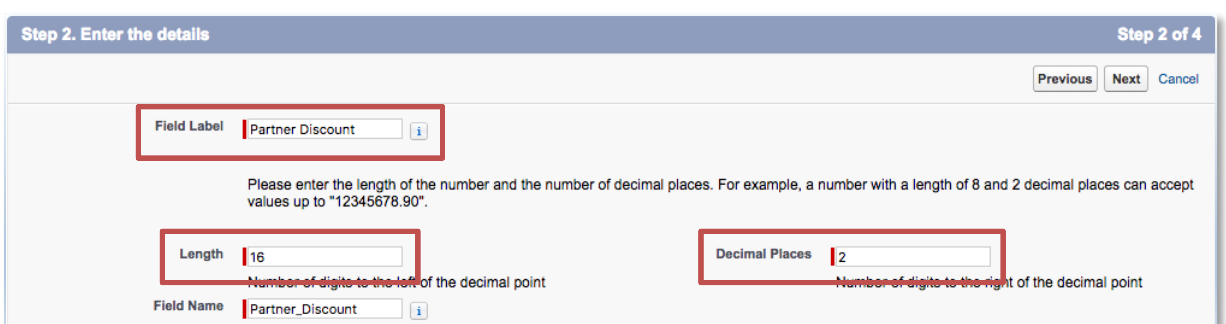
9. Set field values, click Next, Next, then click Save & New



10. Choose Number then click Next

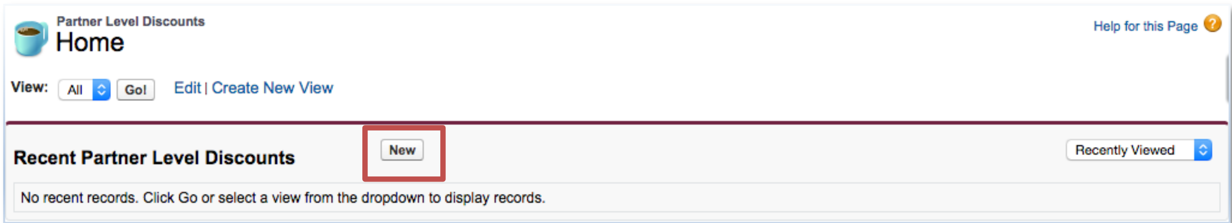


11. Set field values, then click Next, Next, Save



12. Navigate to Partner Level Discount tab

13. Click New



14. Set Fields, then Save & New

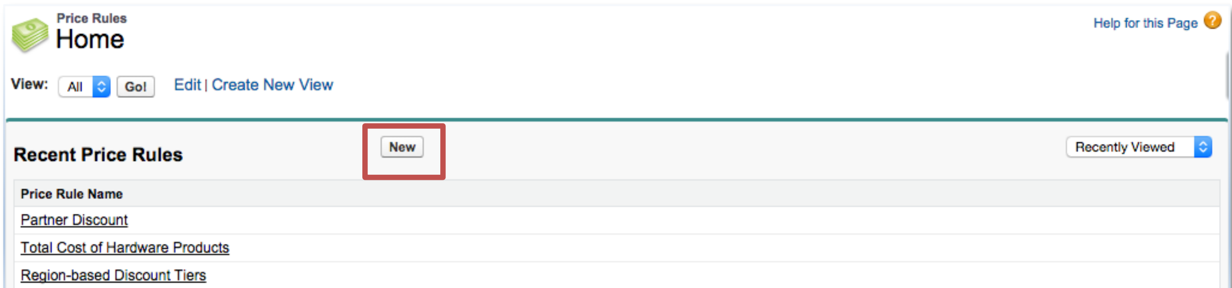
15. Create remaining Partner Discount Level records per table:

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

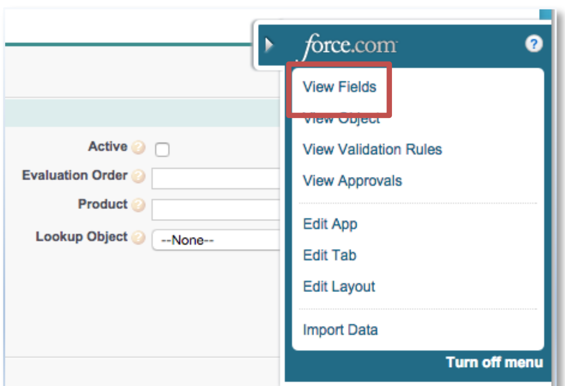
EX31: Partner Discounts by Product Family

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

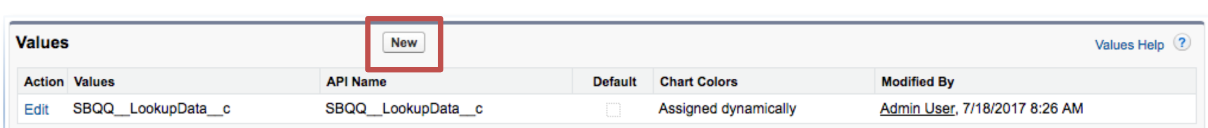


3. Open the Force.com Quick Access Menu, then click View Fields

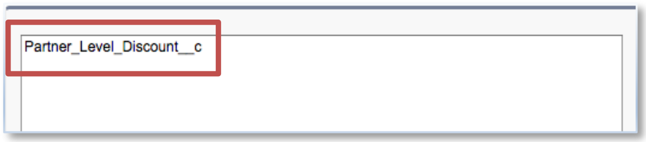


4. Click the Lookup Object link

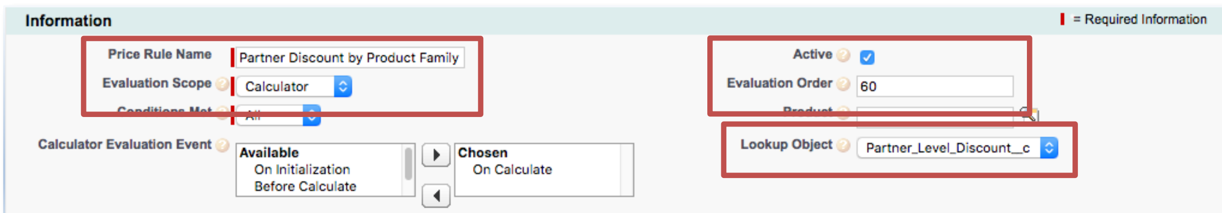
5. Click New in Values



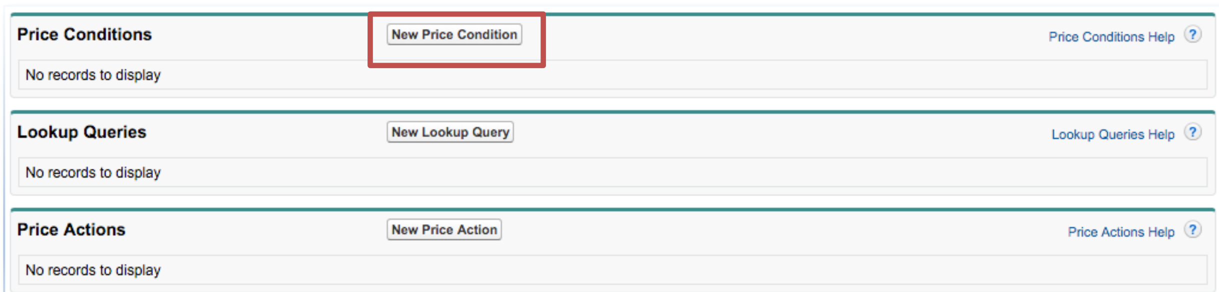
6. Enter API name of the Partner Level Discount Object, then Save



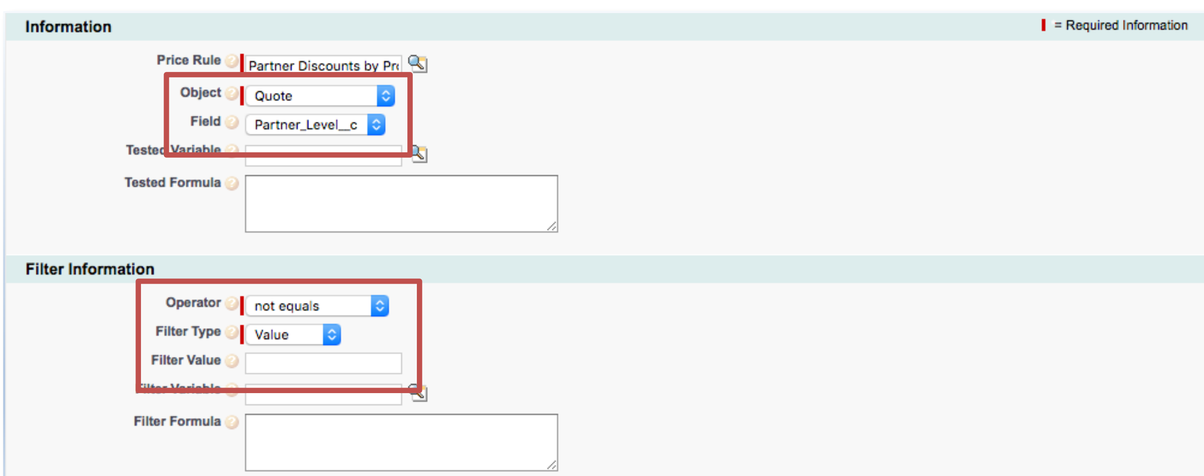
7. Return to the original Price Rule tab and refresh the page
8. Set field values, then Save



9. Click New Price Condition in Price Conditions

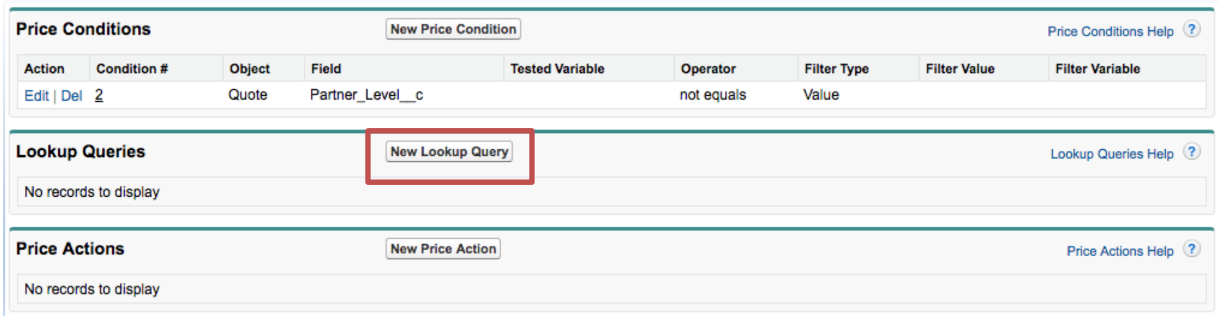


10. Set field values, click Save

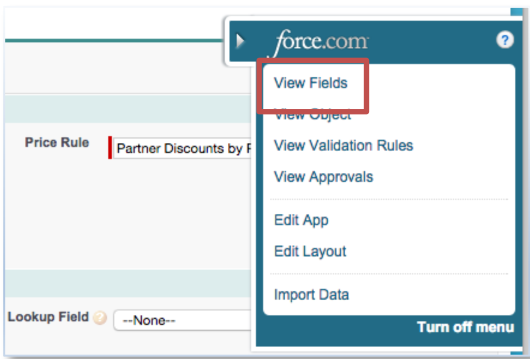


11. Navigate back to the Price Rule

12. Click New Lookup Query in Lookup Queries

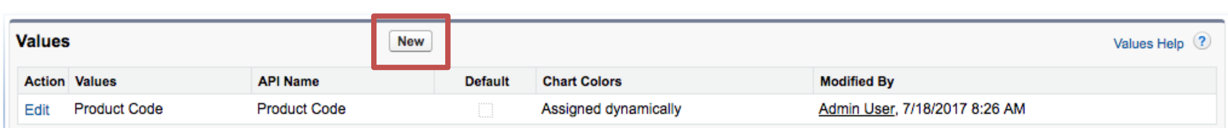


13. Open the Force.com Quick Access Menu, then click View Fields

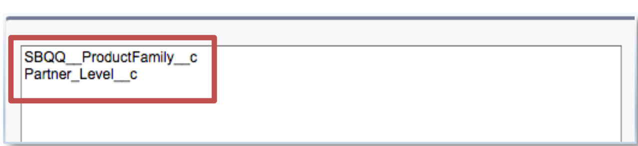


14. Click the Tested Field link

15. Click New in Values

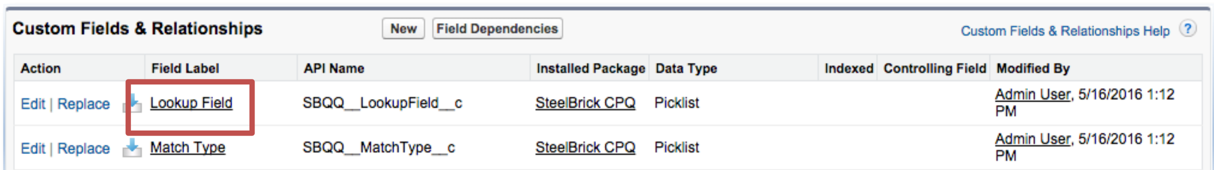


16. Enter name of the Quote Line Product Family field and Quote Partner Level field, then Save

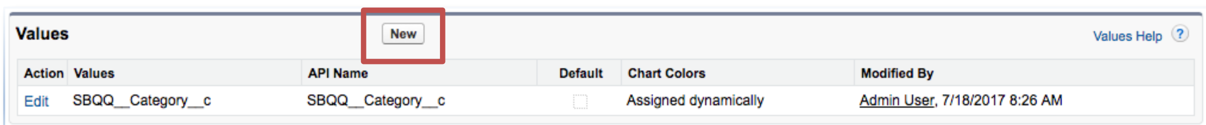


17. Return to Lookup Query object

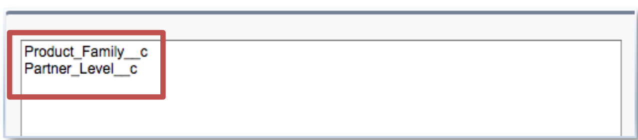
18. Click the Lookup Field link



19. Click New in Values

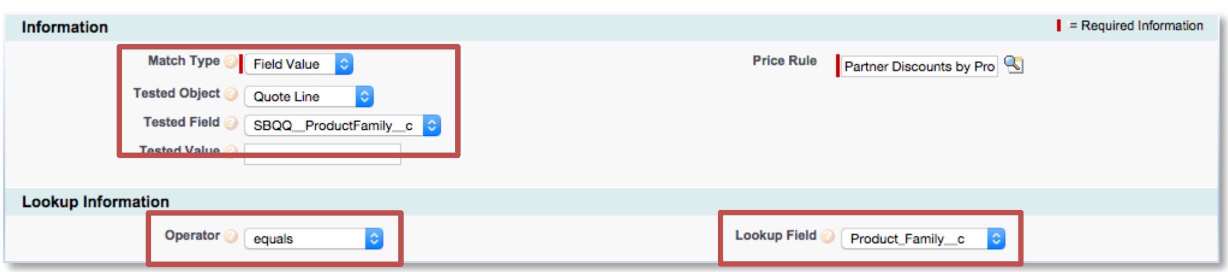


20. Enter API name of the Product Family and Partner Level from the Partner Discount Object, then Save

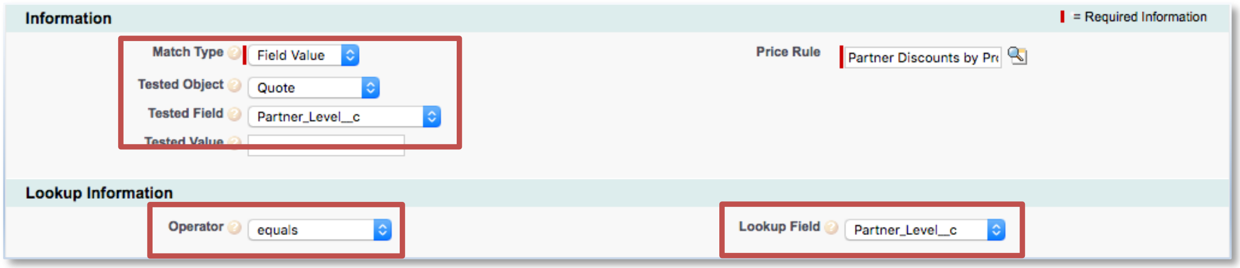


21. Return to the original Lookup Query tab and refresh the page

22. Set field values, then Save & New

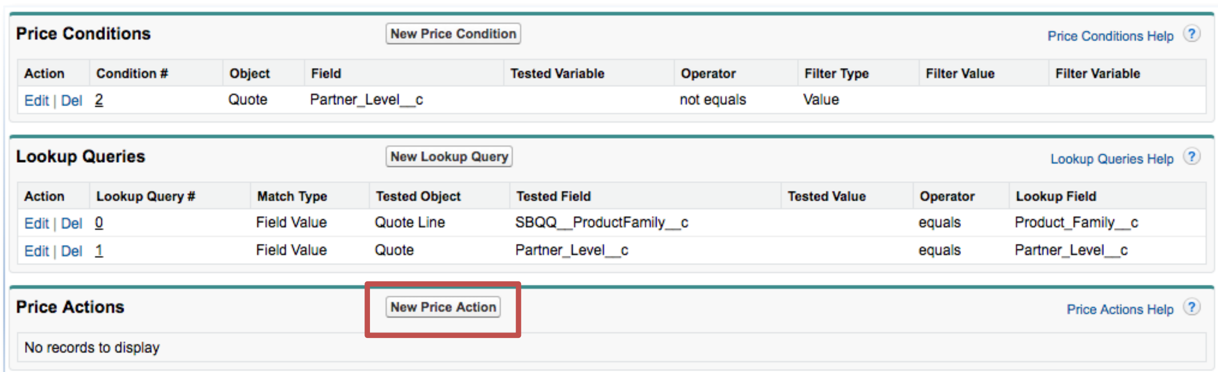


23. Set field values, then Save

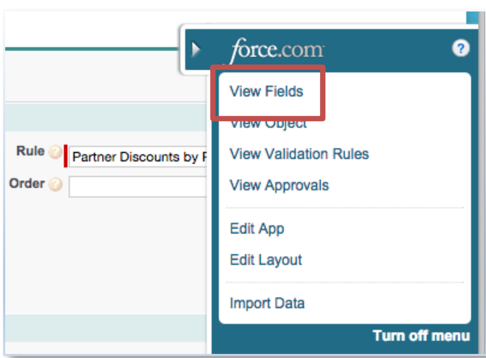


24. Return to the Partner Discounts by Product Family Price Rule

25. Click New Price Action in Price Actions

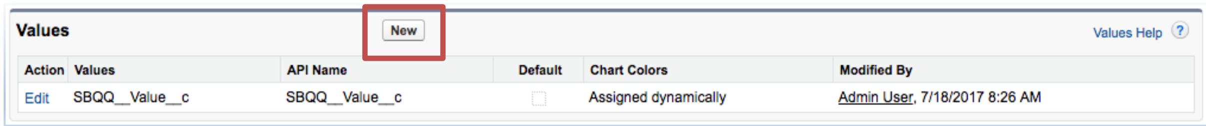


26. Open the Force.com Quick Access Menu, then click View Fields

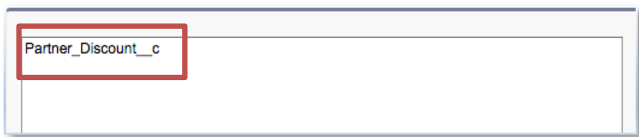


27. Click the Source Lookup Field link

28. Click New in Values

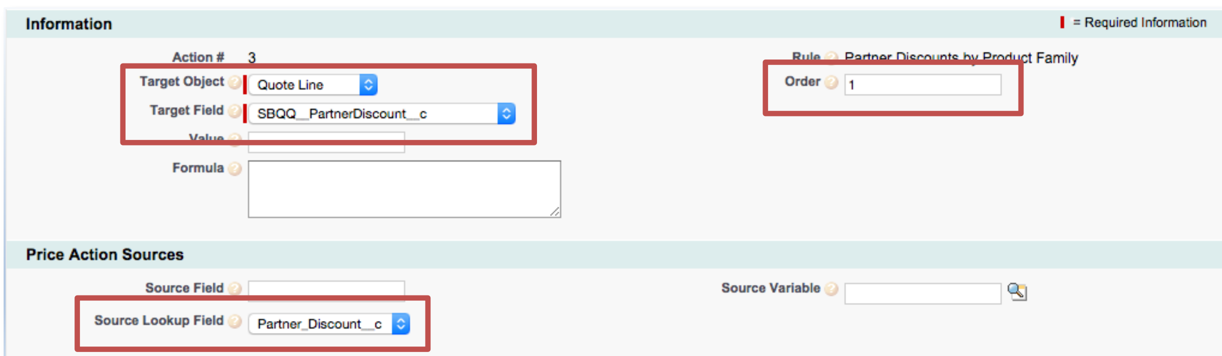


29. Enter API name of the Partner Discount field from the Partner Discount Object, then Save



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

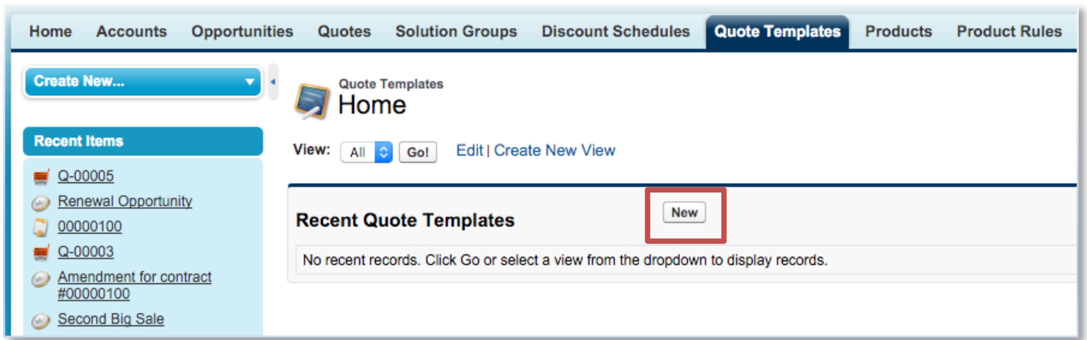
31. Set field values, then Save



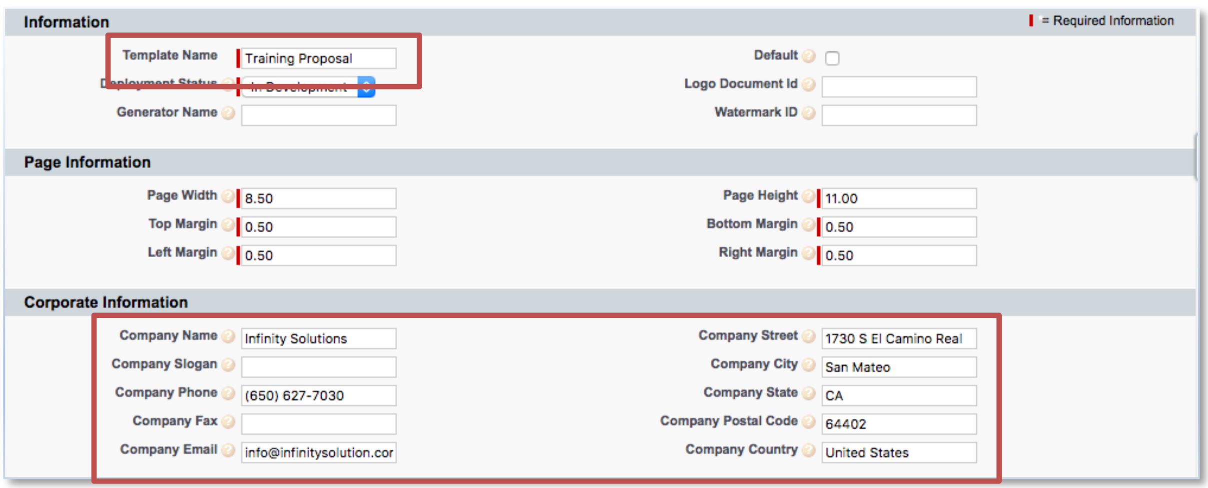
EX36: Create a Quote Template

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

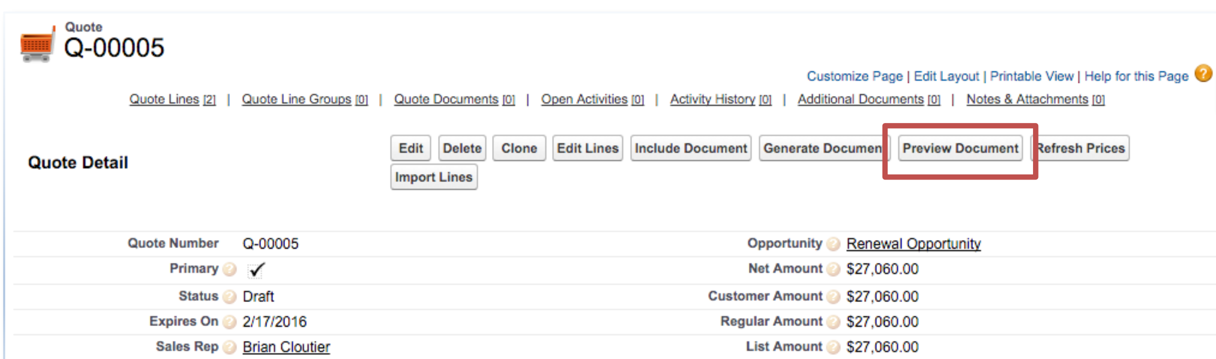
1. Navigate to the Quote Templates tab
2. Click New



3. Set field values, then Save



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

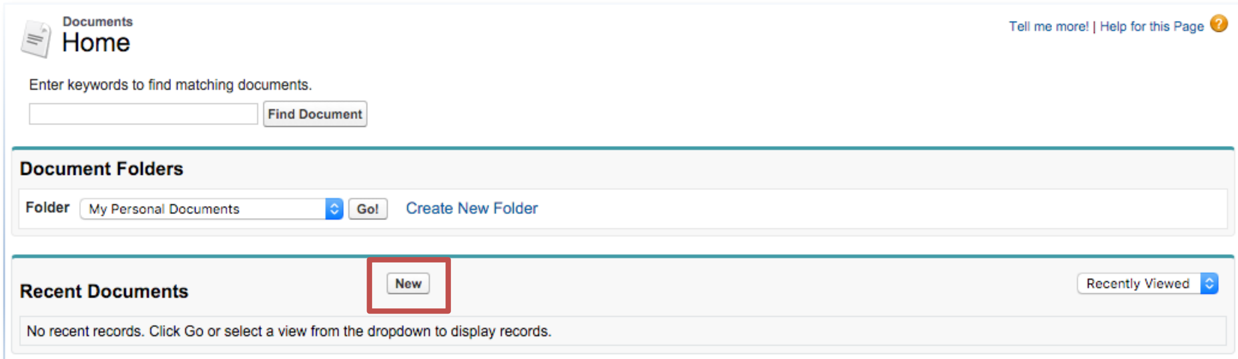


EX37: Upload a Logo File

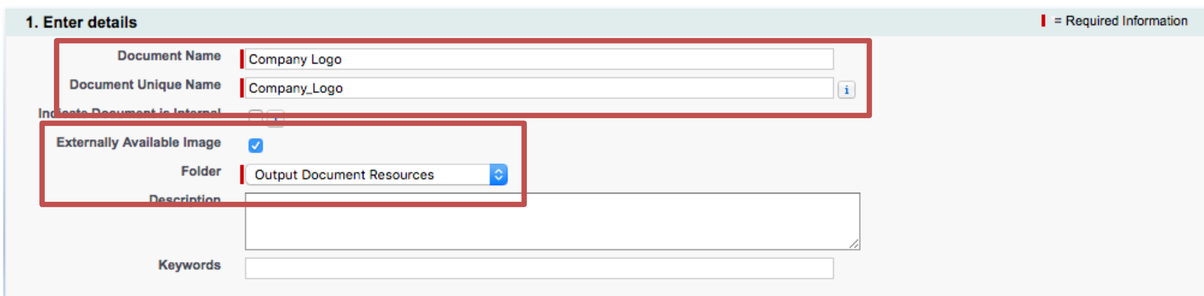
Objective: Add a company logo to appear in the upper-left of the first page of the generated proposal.

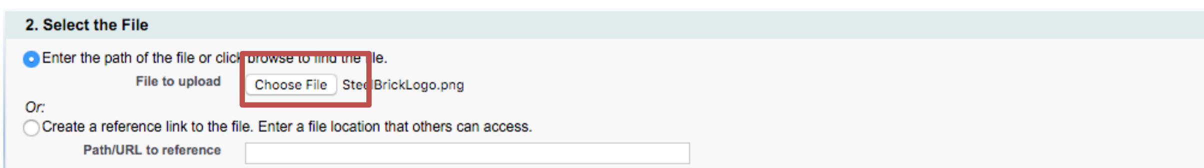
1. Navigate to the Documents tab

2. Click New



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

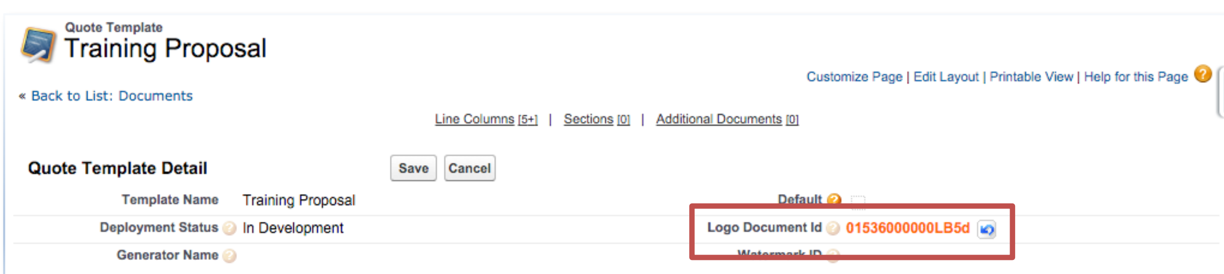




4. Copy the last portion of the URL

5. Navigate to the Quote Template

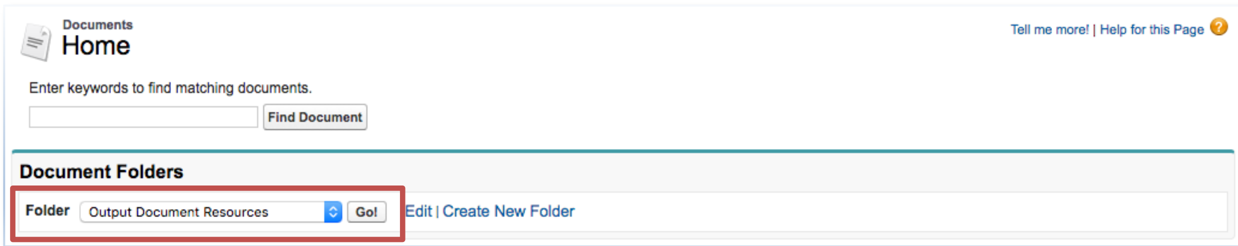
6. Paste portion of URL into Logo Document ID, then Save



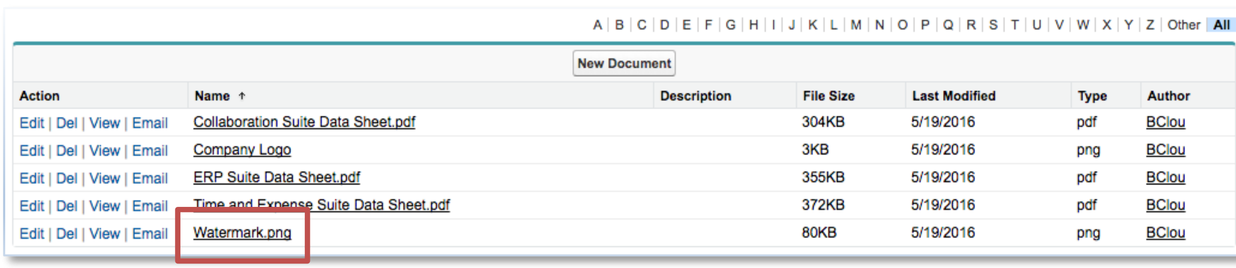
EX38: Add Draft Watermark

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

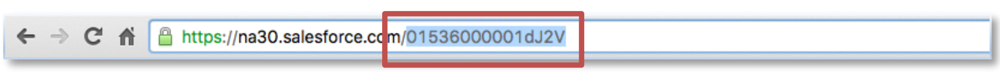
1. Navigate to the Documents tab
2. Choose the Output Document Resources folder (click Go! if already selected)



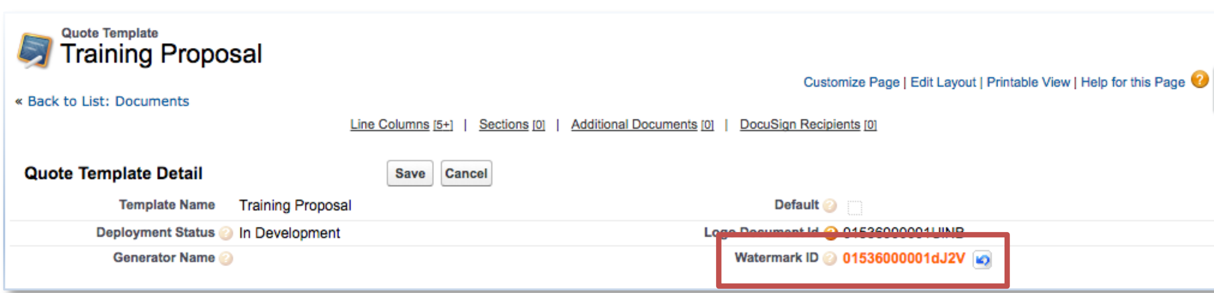
3. Click on Watermark.png link



4. Copy the last portion of URL

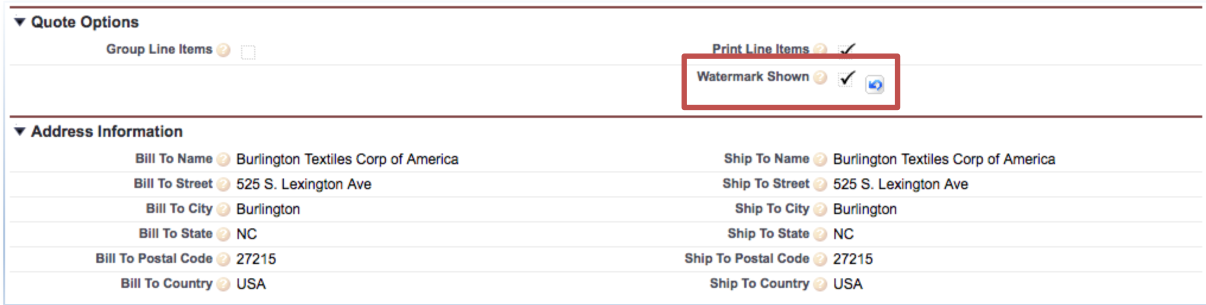


5. Navigate to the Quote Template
6. Paste portion of URL into Watermark ID, then Save



7. Navigate to any existing quote with line items

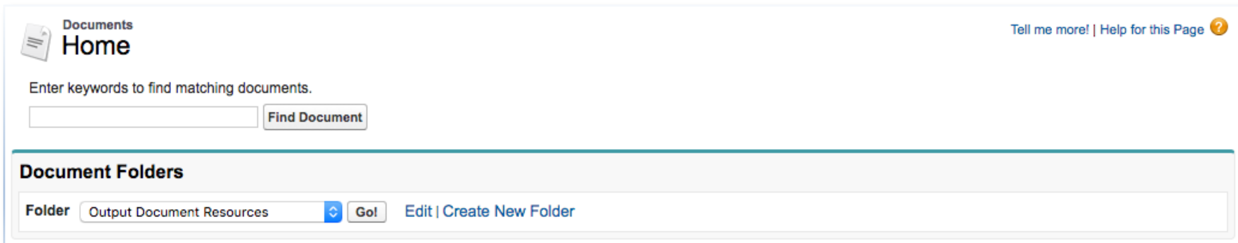
8. Update field value, then Save



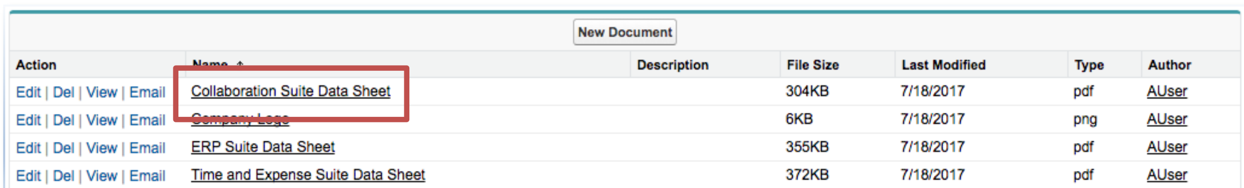
EX39: Add Additional Documents

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

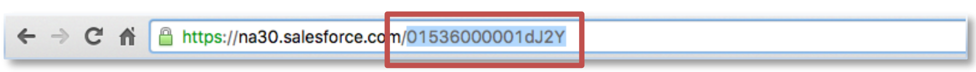
1. Navigate to the Documents tab
2. Choose the Output Document Resources folder (click Go! if already selected)



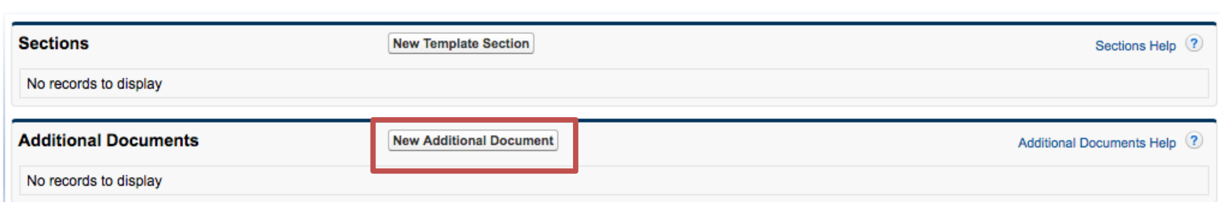
3. Click on Collaboration Suite Data Sheet.pdf link



4. Copy the last portion of URL



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



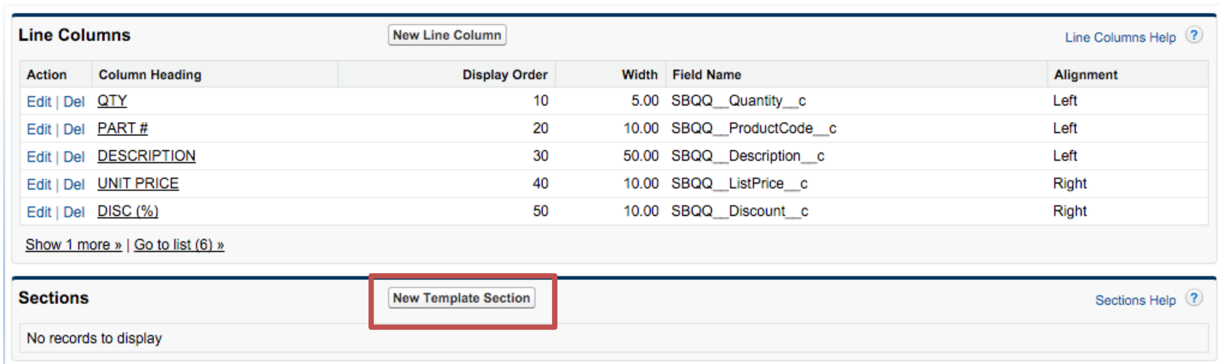
7. Paste portion of URL into Logo Document ID, enter Display Order, then Save

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



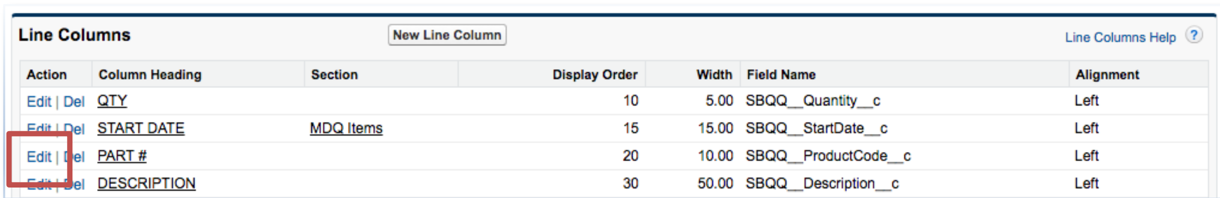
3. Set field values, then click Save & New

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)

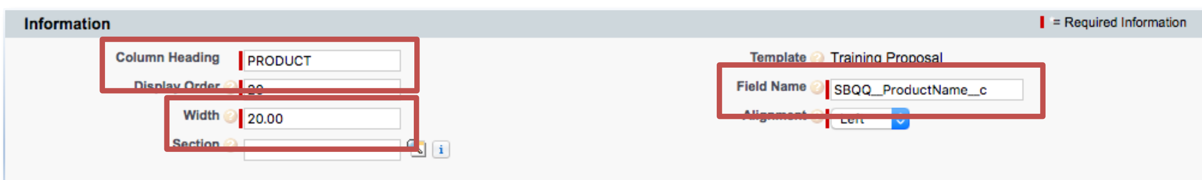
EX44: Adjust Line Columns

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.

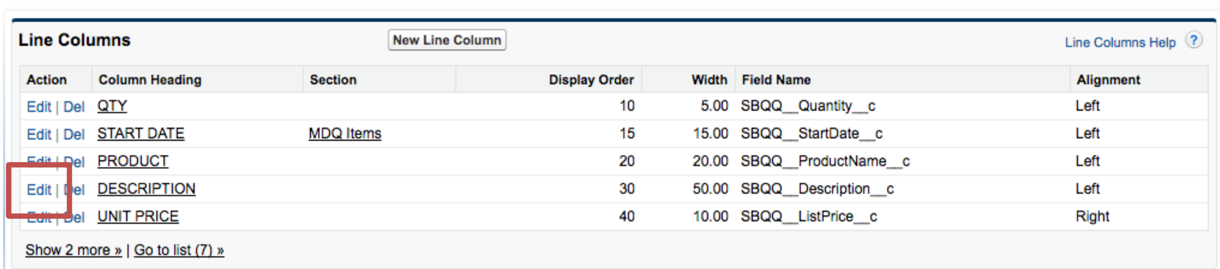
1. Navigate to the Quote Template
2. Click Edit next to the Part # column



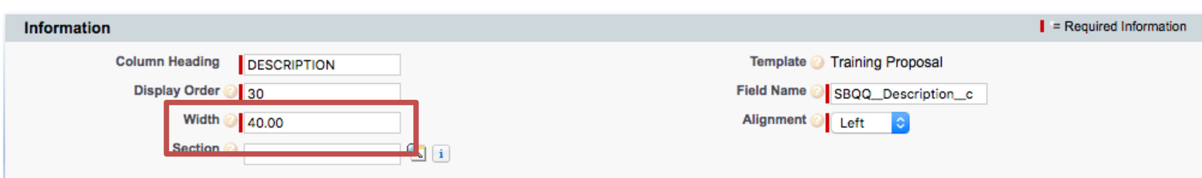
3. Update field values, then Save



4. Click Edit next to the Description column



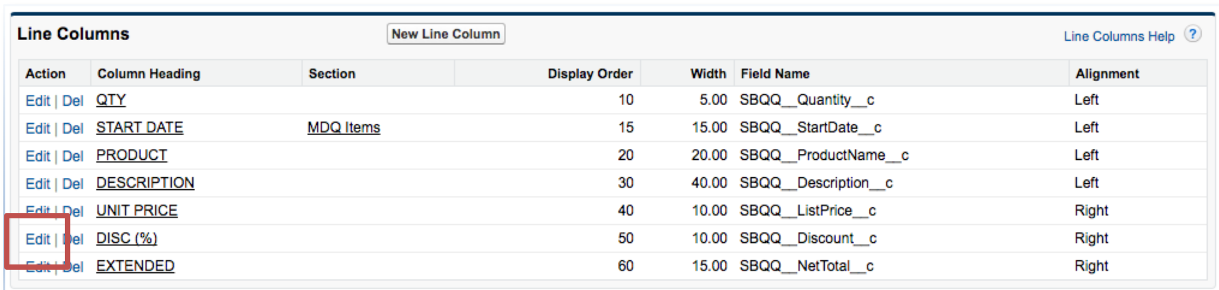
5. Update field value, then Save



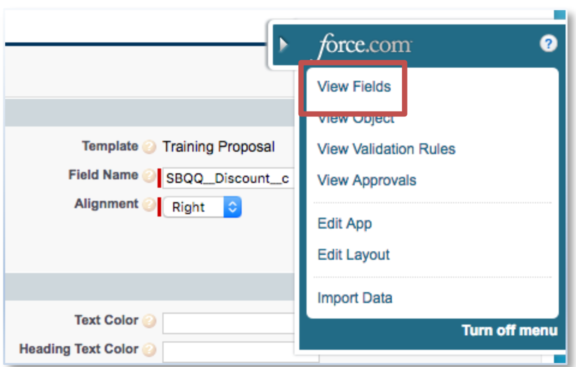
EX45: Conditional Discount Column

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.

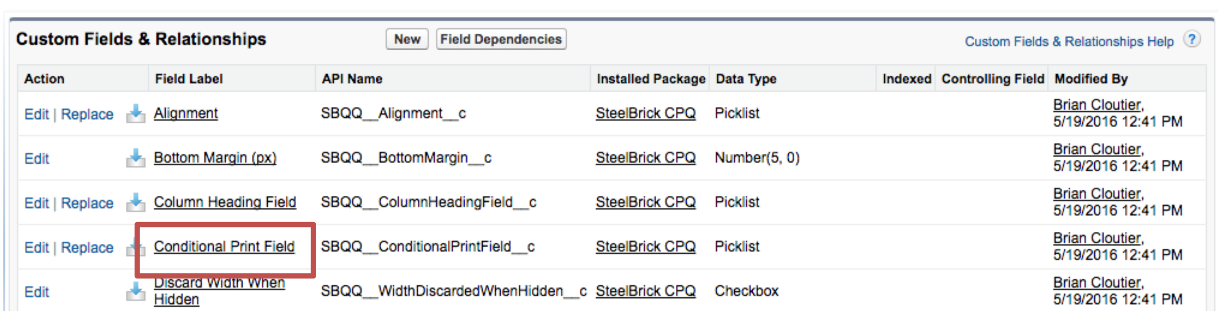
1. Navigate to the Quote Template
2. Click Edit next to the Disc (%) column



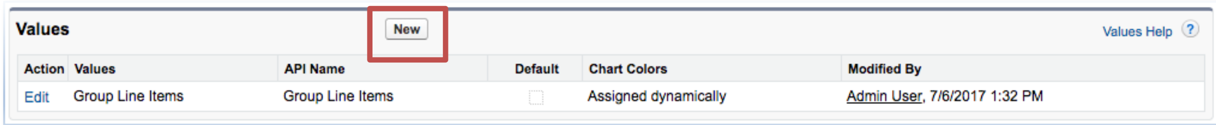
3. Open the Force.com Quick Access Menu, then click View Fields



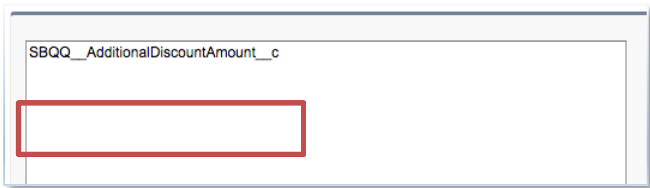
4. Click the Conditional Print Field link



5. Click New in Values

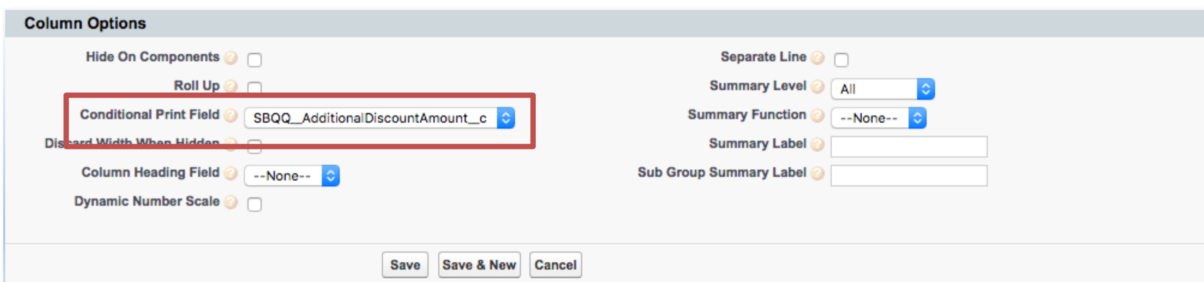


6. Enter API name of the Quote Line Additional Disc. (Amt) field, then Save



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

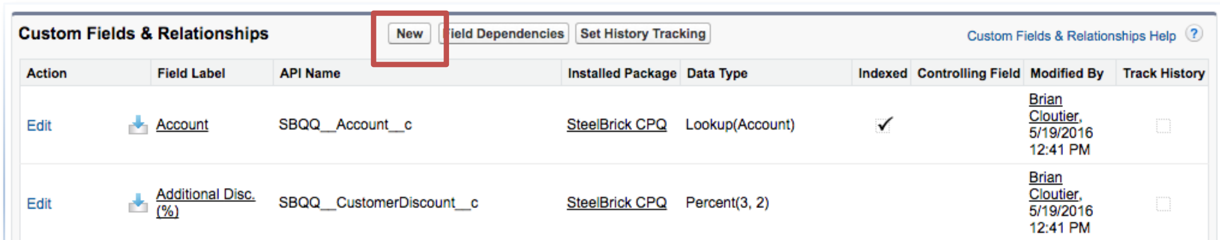
8. Set field value, then Save



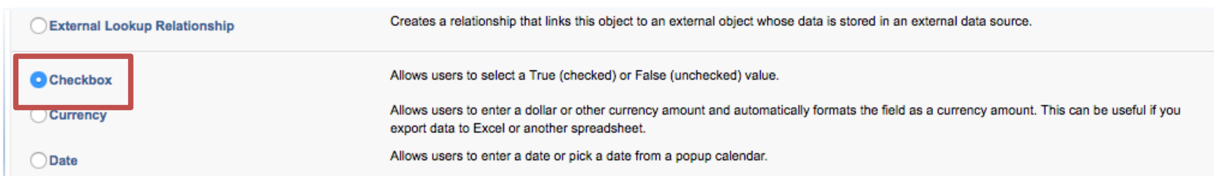
EX46: Conditional Pricing Columns

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.

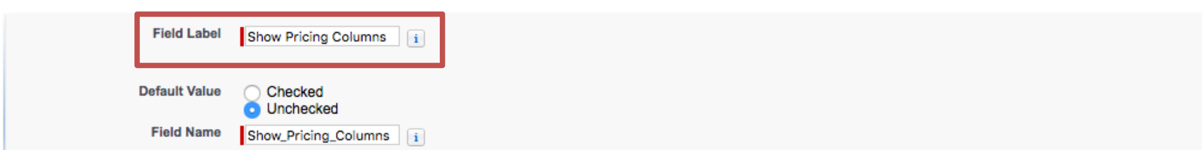
1. Navigate to Setup | Create | Objects | Quote
2. Click New in Custom Fields & Relationships



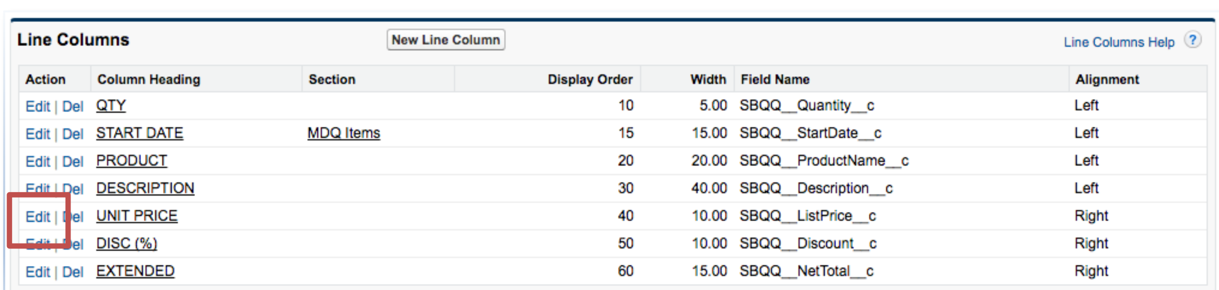
3. Choose Checkbox then click Next



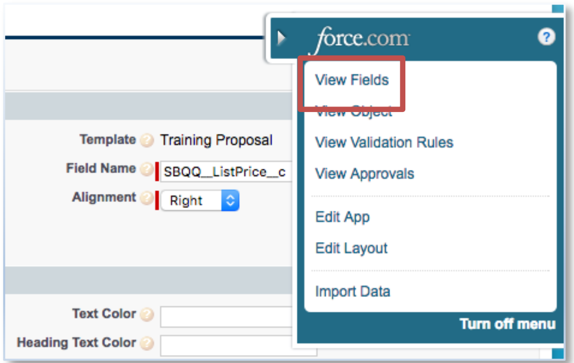
4. Enter Show Pricing Columns as the field label, then click Next, Next, Save



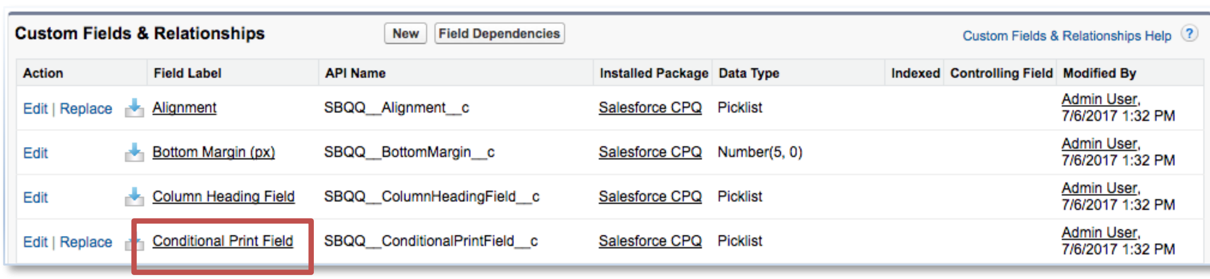
5. Navigate to the Quote Template
6. Click Edit next to the Unit Price column



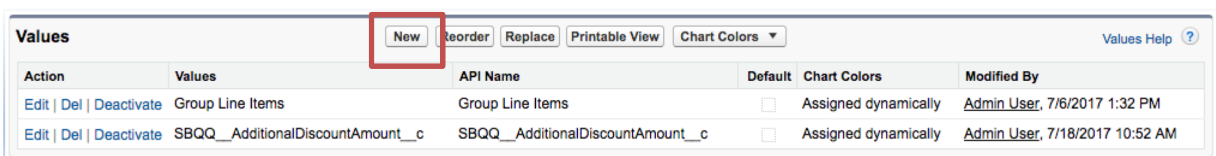
7. Open the Force.com Quick Access Menu, then click View Fields



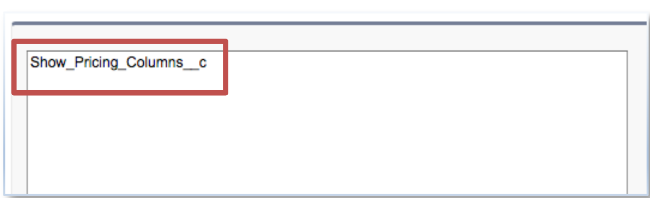
8. Click the Conditional Print Field link



9. Click New in Values

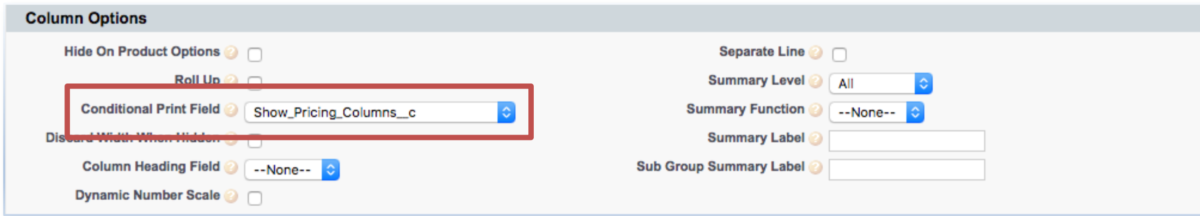


10. Enter API name of the Quote Show Pricing Columns field, then Save



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

12. Set field value, then Save

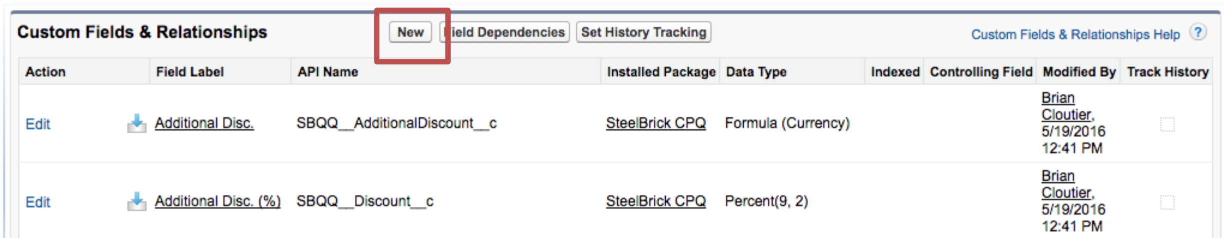


13. Repeat steps 5, 6 and 13 for the Extended line column

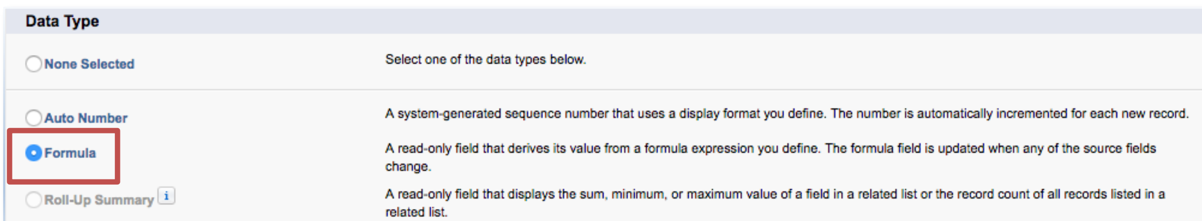
EX47: Group Subscription Lines

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

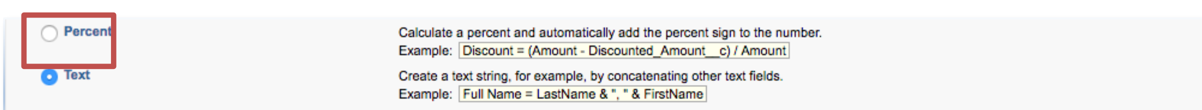
1. Navigate to Setup | Create | Objects | Quote Line
2. Click New in Custom Fields & Relationships



3. Choose Formula, then click Next



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

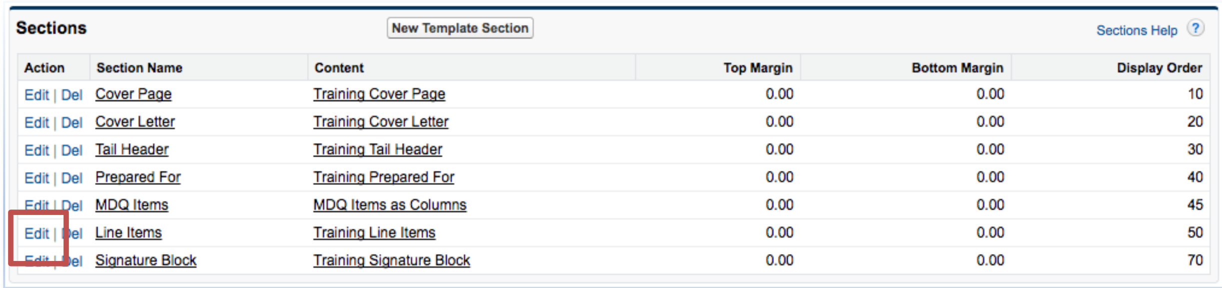


5. Set formula body as described below, then click Next, Next, Save

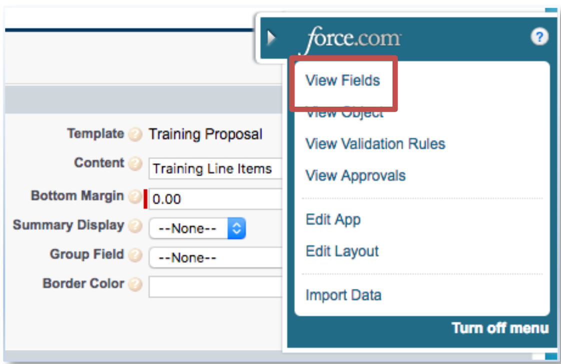
```
IF(TEXT(SBQQ_SubscriptionPricing__c) <> "", "Subscription",
"One-Time")
```

6. Navigate to the Quote Template

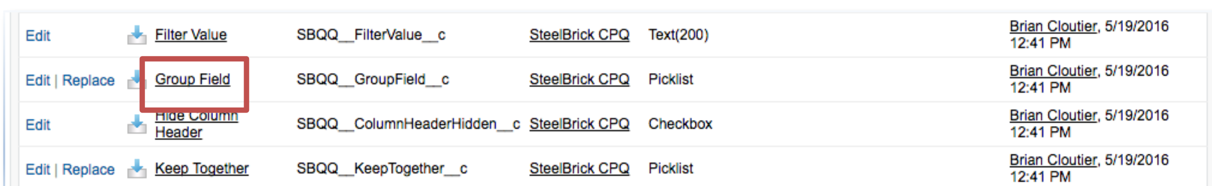
7. Click Edit next to the Line Items section



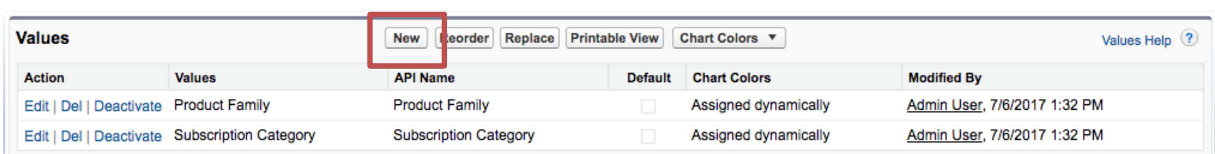
8. Open the Force.com Quick Access Menu, then click View Fields



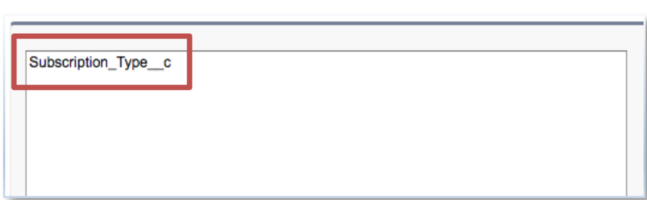
9. Click the Group Field link



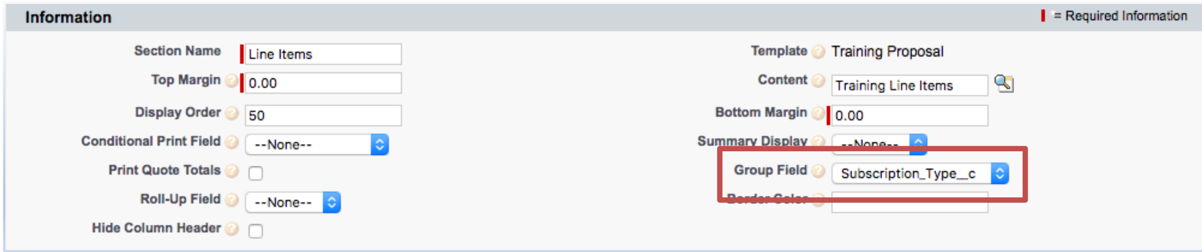
10. Click New in Values



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



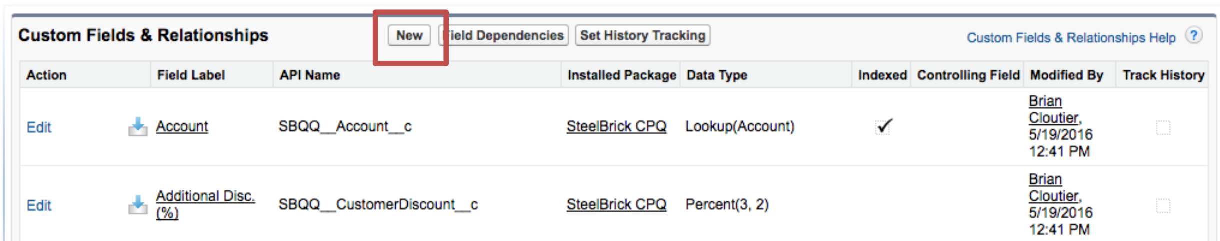
12. Return to the original Template Section tab and refresh the page
13. Set field value, then Save



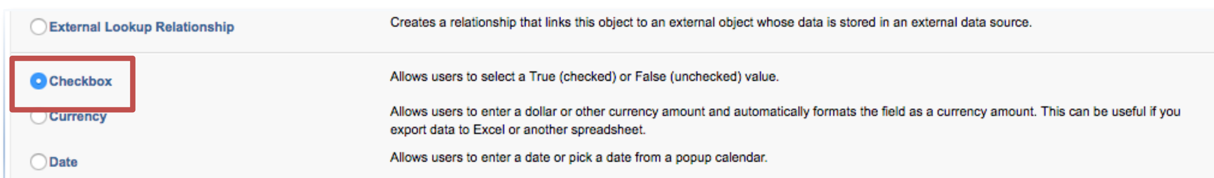
EX50: Conditional Line Item Tables

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.

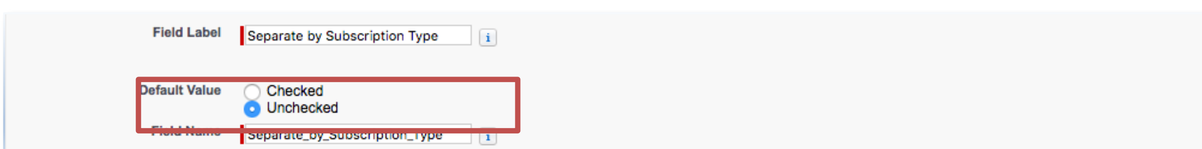
1. Navigate to Setup | Create | Objects | Quote
2. Click New in Custom Fields & Relationships



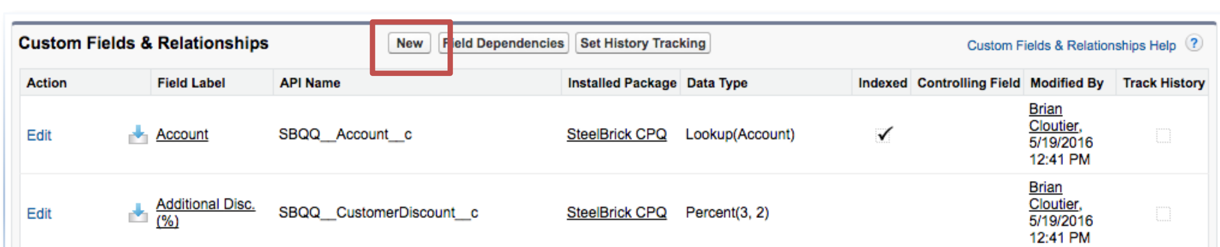
3. Choose Checkbox, then click Next



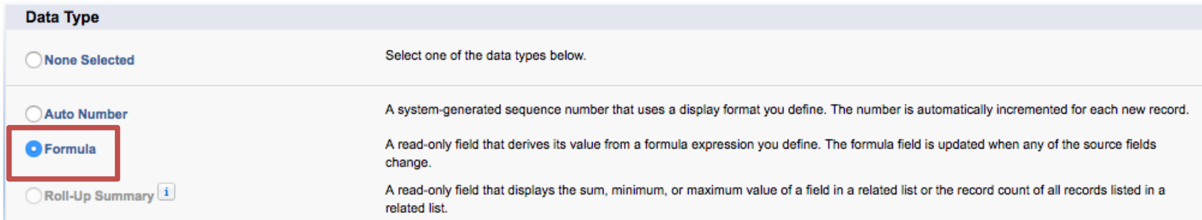
4. Enter Separate by Subscription Type as the field label, then click Next, Next, Save



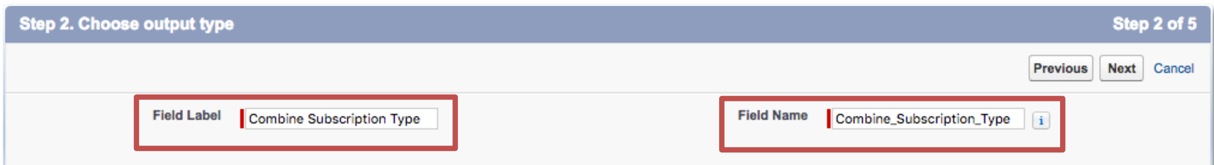
5. Click New in Custom Fields & Relationships

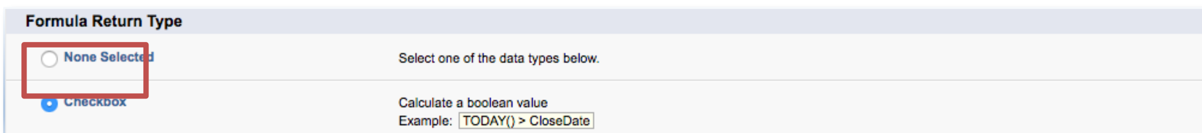


6. Choose Formula then click Next



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



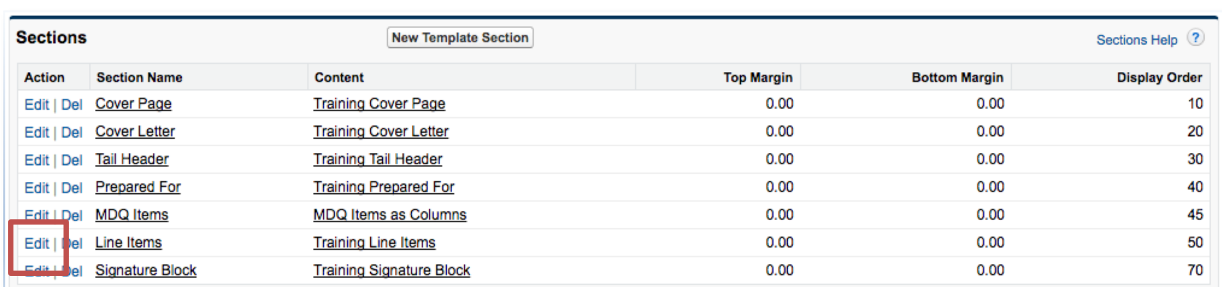


8. Set formula body as described below, then click Next, Next, Save

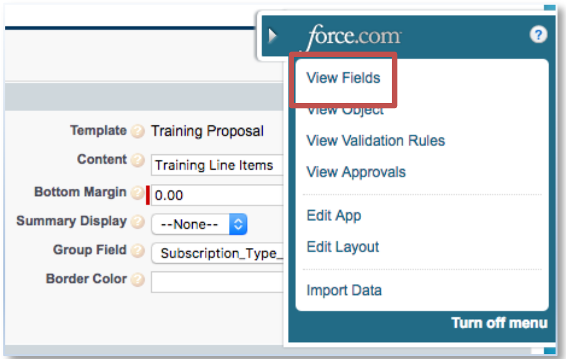
```
IF(Separate_by_Subscription_Type__c, FALSE, TRUE)
```

9. Navigate to the Quote Template

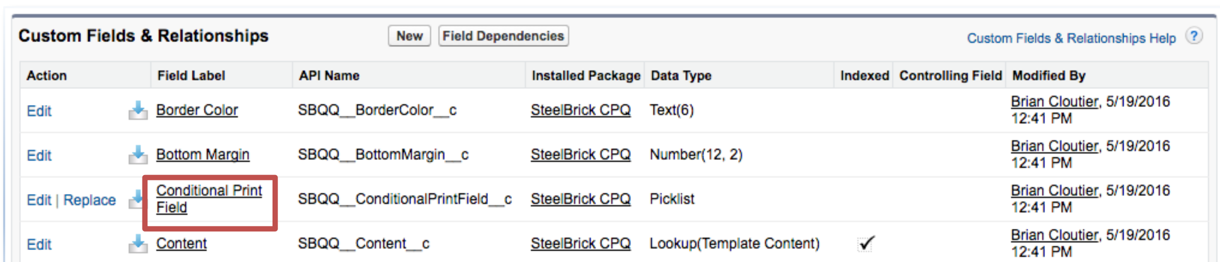
10. Click Edit next to the Line Items section



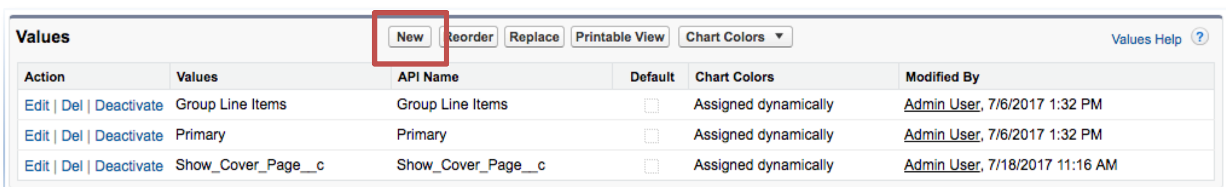
11. Open the Force.com Quick Access Menu, then click View Fields



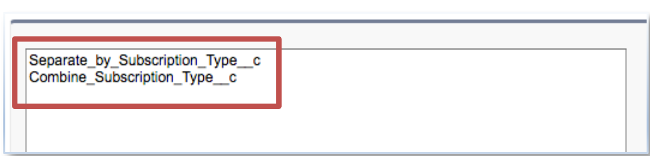
12. Click the Conditional Print Field link



13. Click New in Values

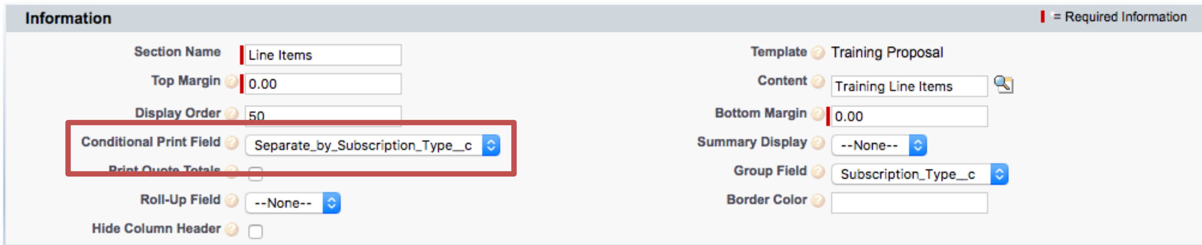


14. Enter API names of the custom Quote fields, then Save

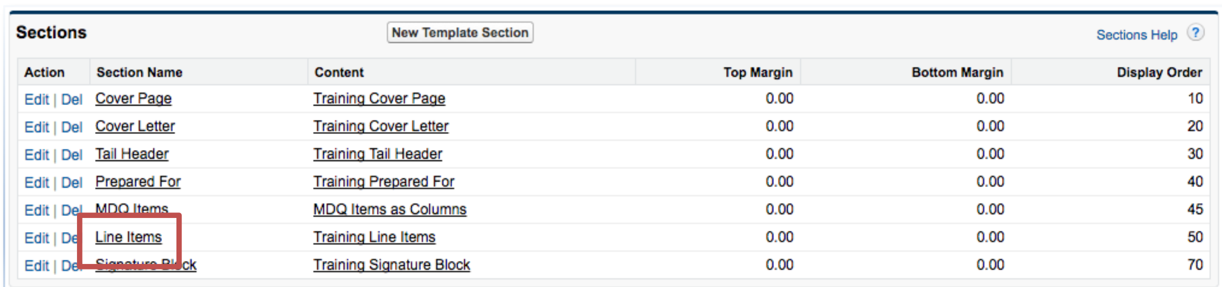


15. Return to the original Template Section tab and refresh the page

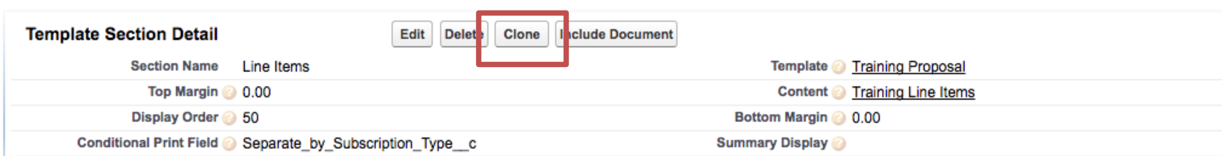
16. Set field value, then Save



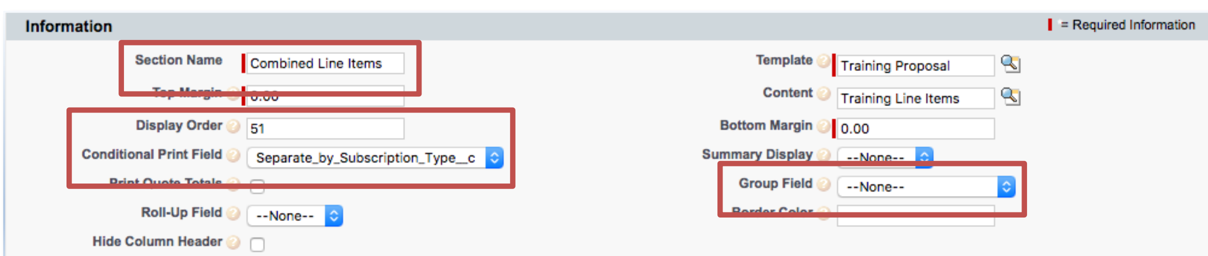
17. Click Line Items section link



18. Click the Clone button



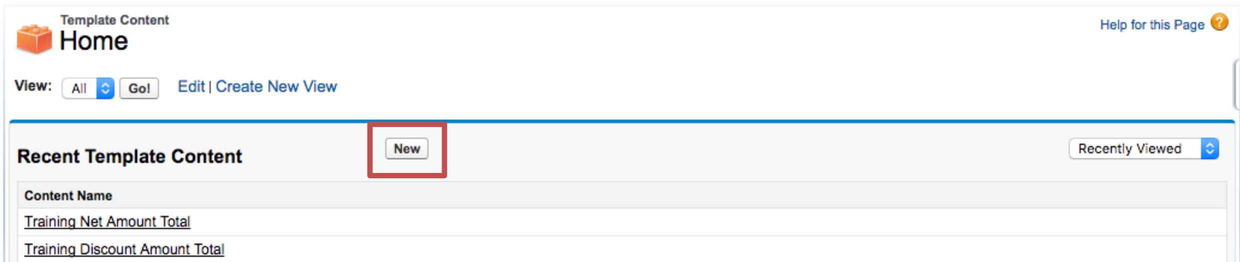
19. Update fields, then Save



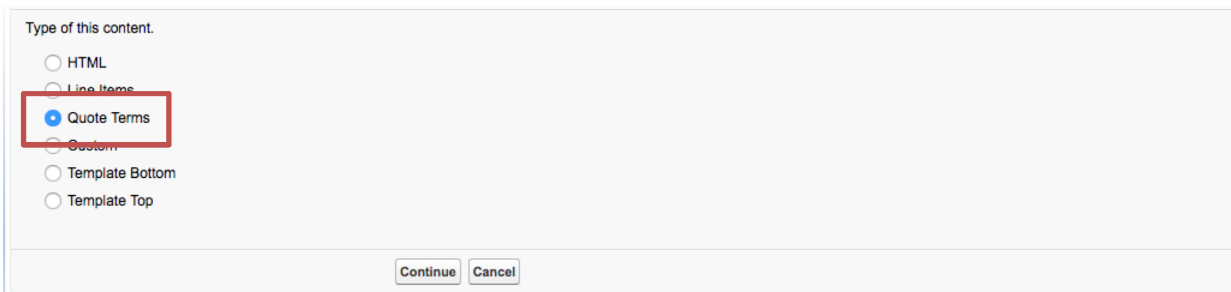
EX52: Quote Terms Section

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.

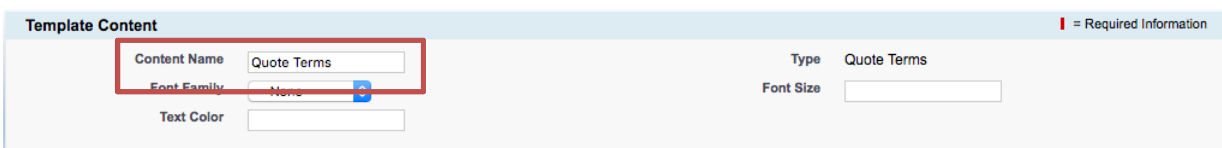
1. Navigate to the Template Content tab
2. Click New



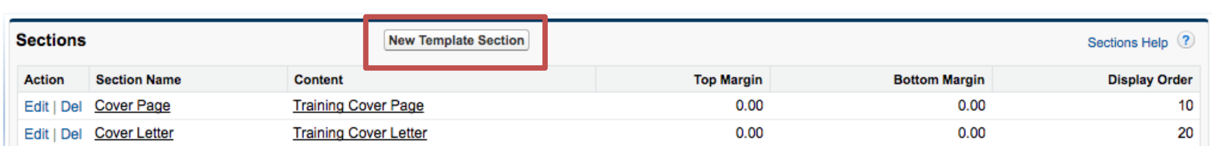
3. Choose Quote Terms, then click Continue



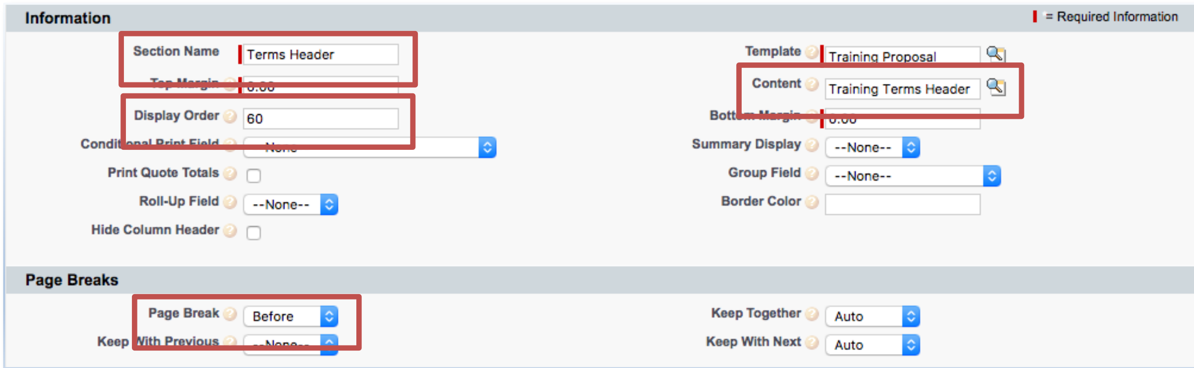
4. Set field value, then Save



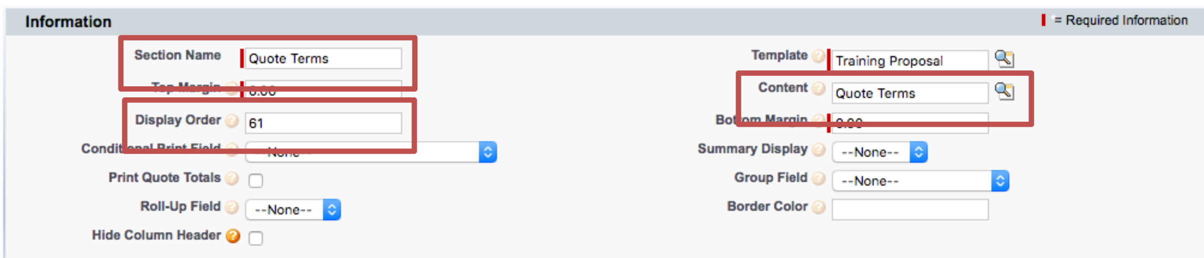
5. Navigate to the Quote Template
6. Click New Template Section in Template Sections



7. Set field values, then click Save & New



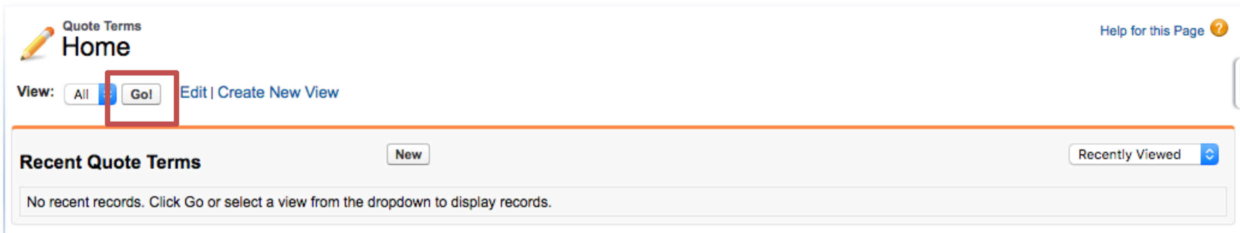
8. Set field values, then Save



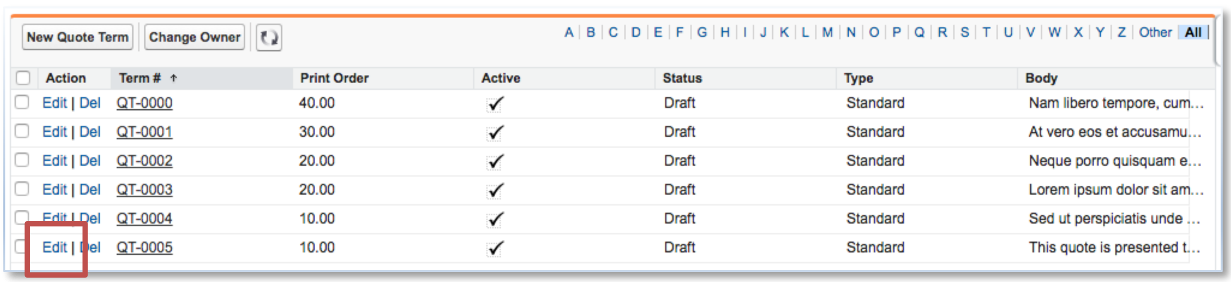
EX53: Quote Term with Merge Field

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

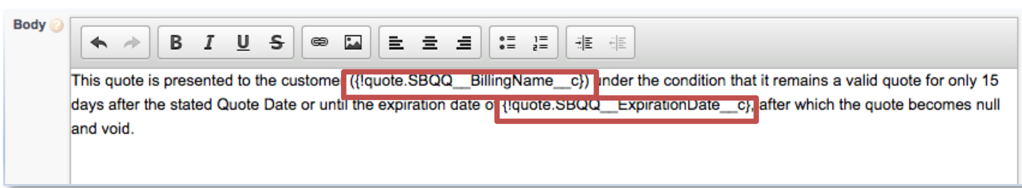
1. Navigate to the Quote Terms tab
2. Click Go!



3. Click Edit next to the term beginning with “This quote is presented…”



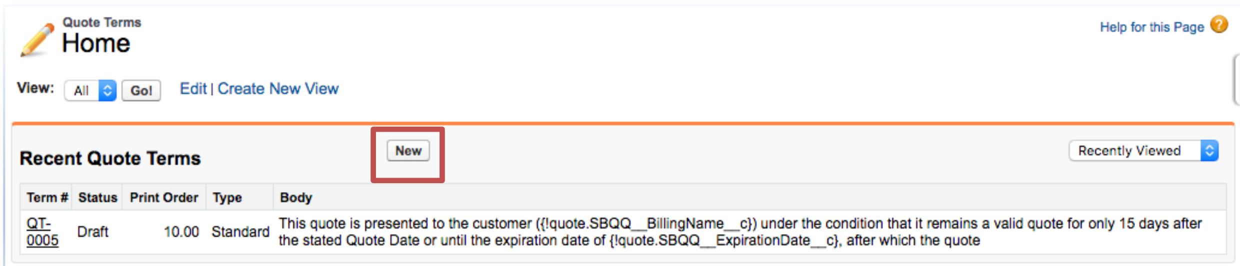
4. Update the term body to include the highlighted text, then Save



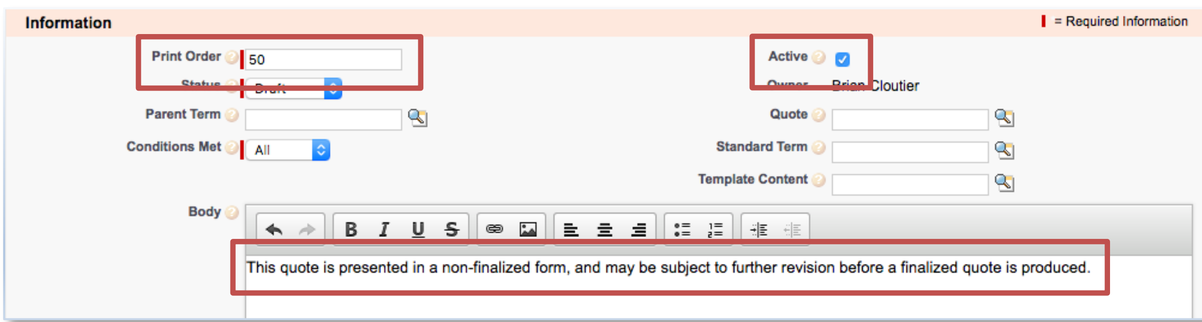
EX54: Conditional Quote Term

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'.

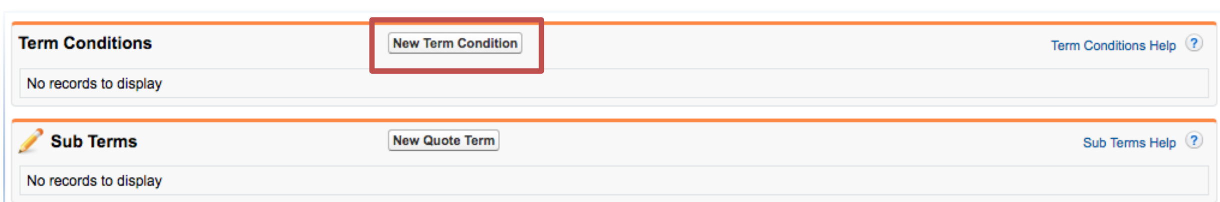
1. Navigate to the Quote Terms tab
2. Click New



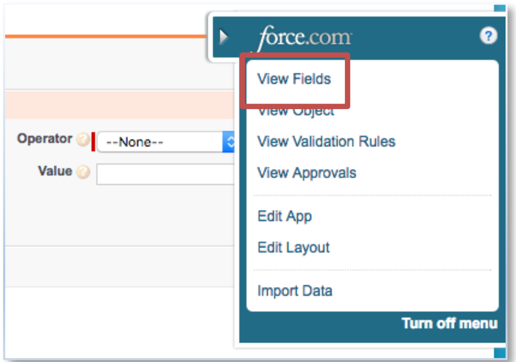
3. Set field values, then Save



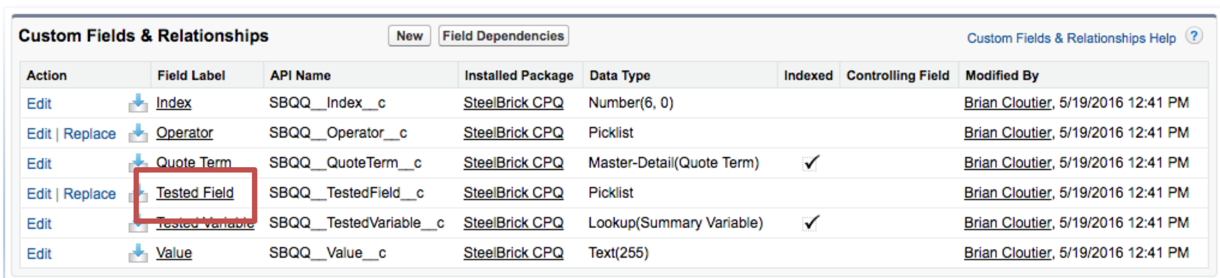
4. Click New Term Condition in Term Conditions



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



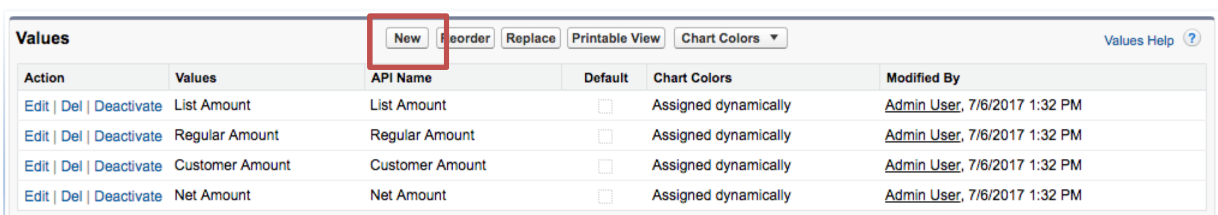
6. Click the Tested Field link



Custom Fields & Relationships [New] [Field Dependencies] Custom Fields & Relationships Help

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

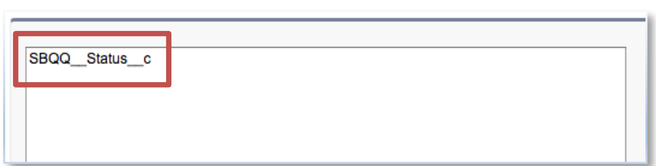
7. Click New in Values



Values [New] [Reorder] [Replace] [Printable View] [Chart Colors] Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
Edit | Del | Deactivate	List Amount	List Amount		Assigned dynamically	Admin User, 7/6/2017 1:32 PM
Edit | Del | Deactivate	Regular Amount	Regular Amount		Assigned dynamically	Admin User, 7/6/2017 1:32 PM
Edit | Del | Deactivate	Customer Amount	Customer Amount		Assigned dynamically	Admin User, 7/6/2017 1:32 PM
Edit | Del | Deactivate	Net Amount	Net Amount		Assigned dynamically	Admin User, 7/6/2017 1:32 PM

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



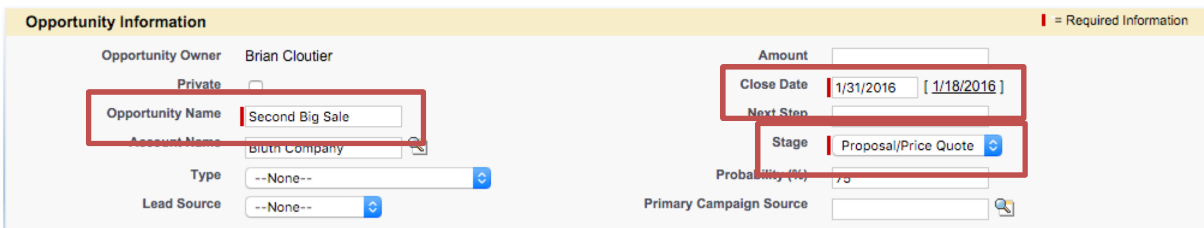
9. Return to the original Term Condition tab and refresh the page

Set field values, then Save

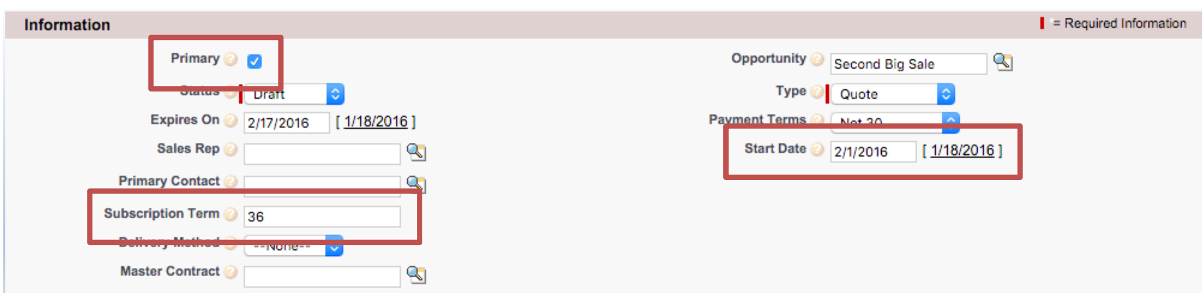
EX33: Create a Contract and Renewal Opportunity

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.

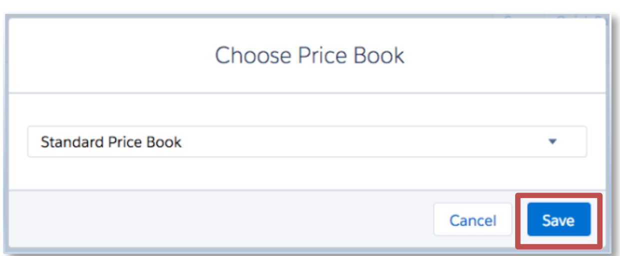
1. Navigate to the Account created on the first day
2. Click New Opportunity in Opportunities
3. Set field values, then Save



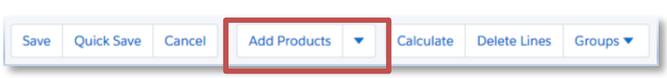
4. Click New Quote in Quotes
5. Set field values, then Save



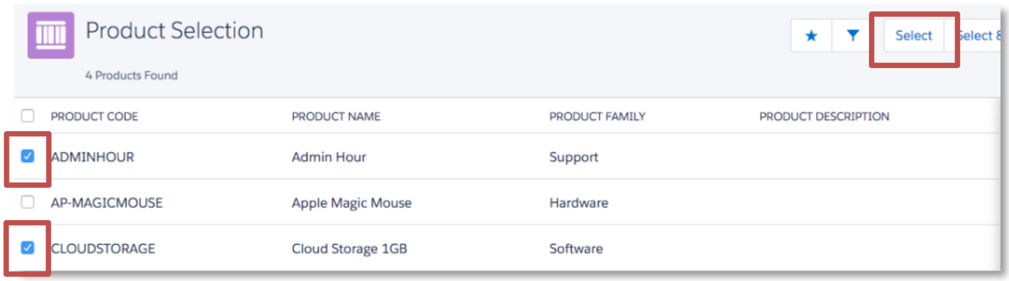
6. Click Save to Choose Price Book popup



7. Click Add Products



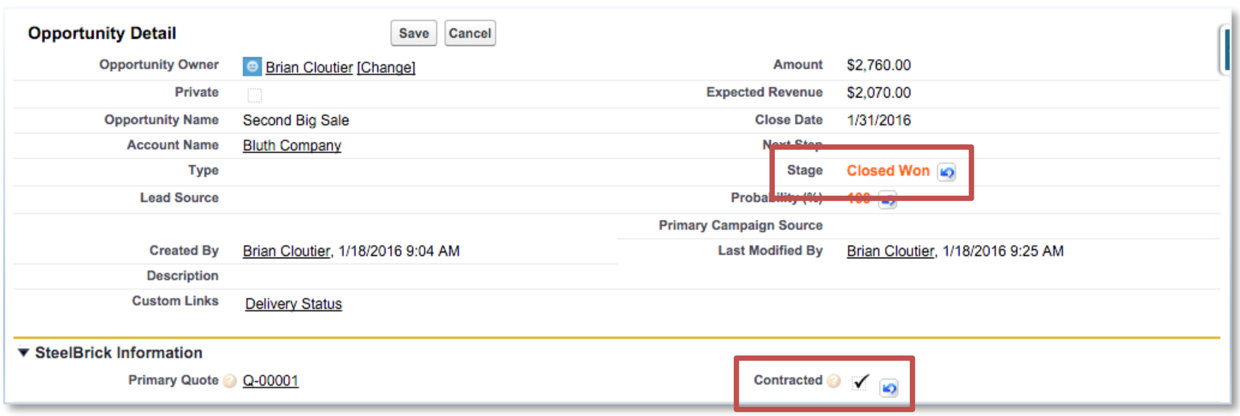
8. Choose the following Products, then click Select



9. Save the Quote

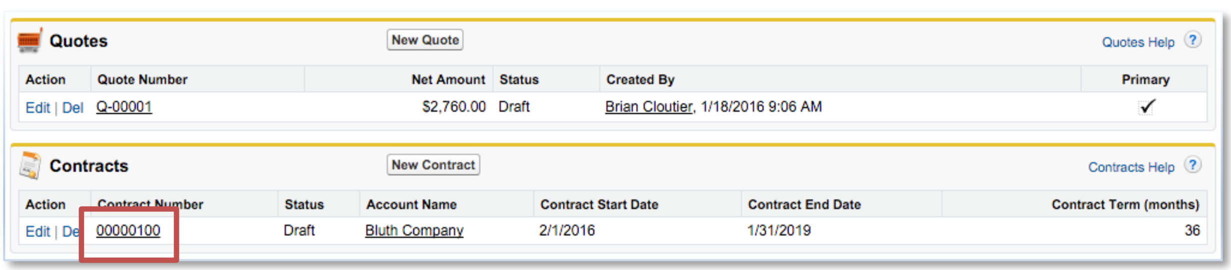
10. Return to the Opportunity

11. Set field values, then Save

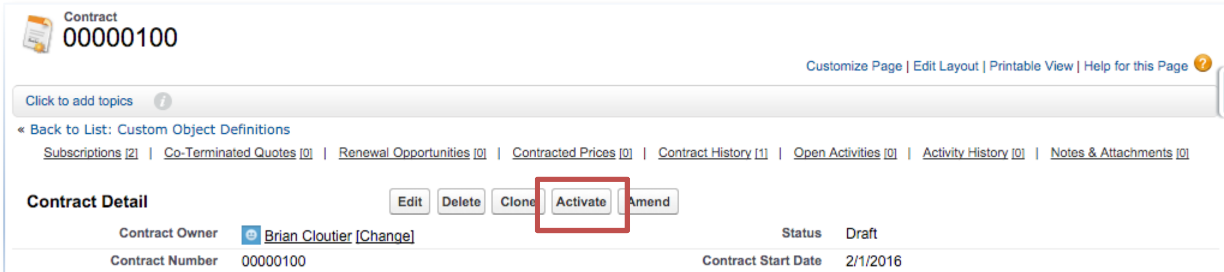


12. Refresh the opportunity page

13. Click the Contract Number link in Contracts



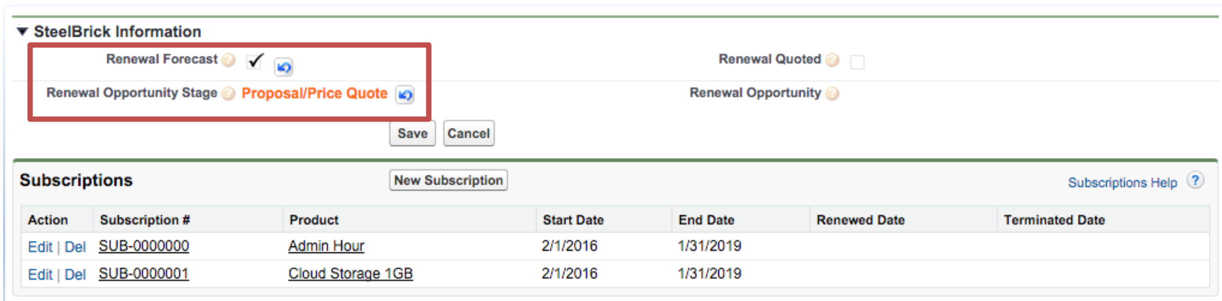
14. Click the Activate button



15. Click OK if a warning popup appears

16. Navigate back to the Contract

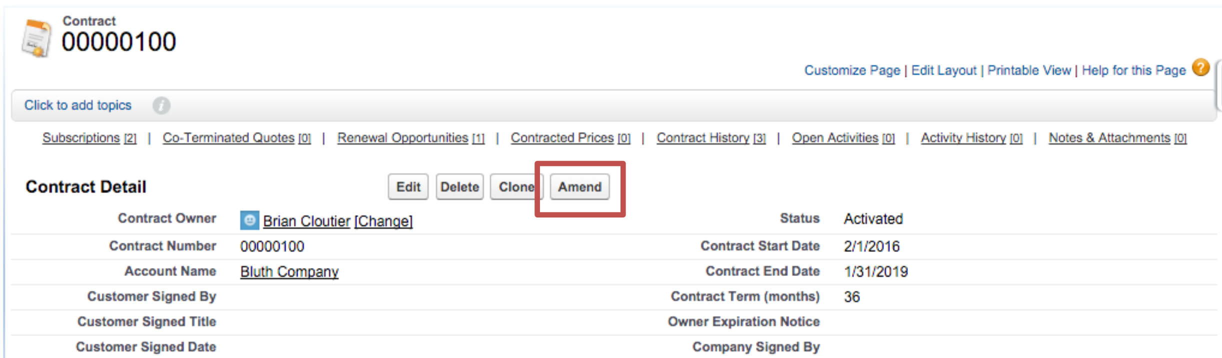
17. Set field values, then Save



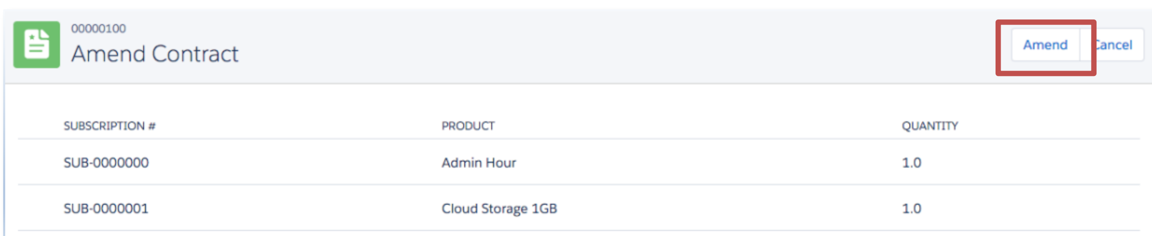
EX34: Create Amendment Opportunity and Quote

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.

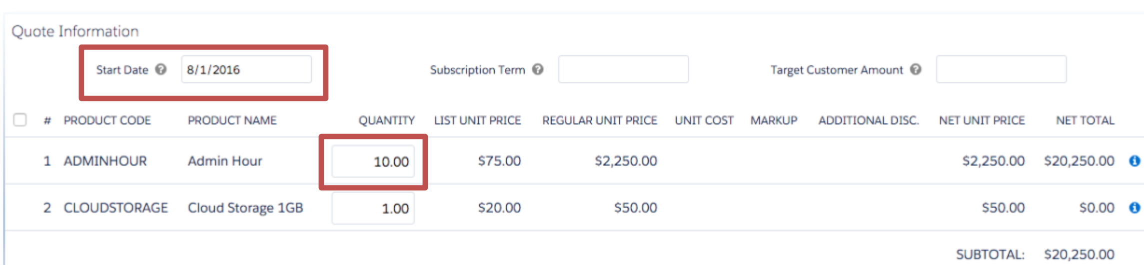
1. Navigate to the original Contract
2. Click Amend



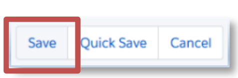
3. Click Amend on subscription preview page



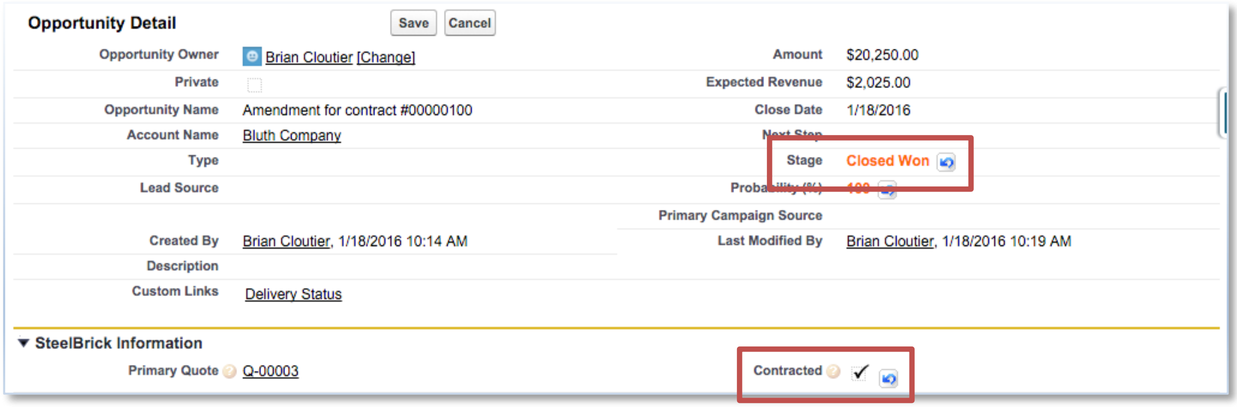
4. Set start date, adjust quantity, then Calculate



5. Save the Quote



6. Navigate to the Amendment Opportunity
7. Set field values, then Save



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