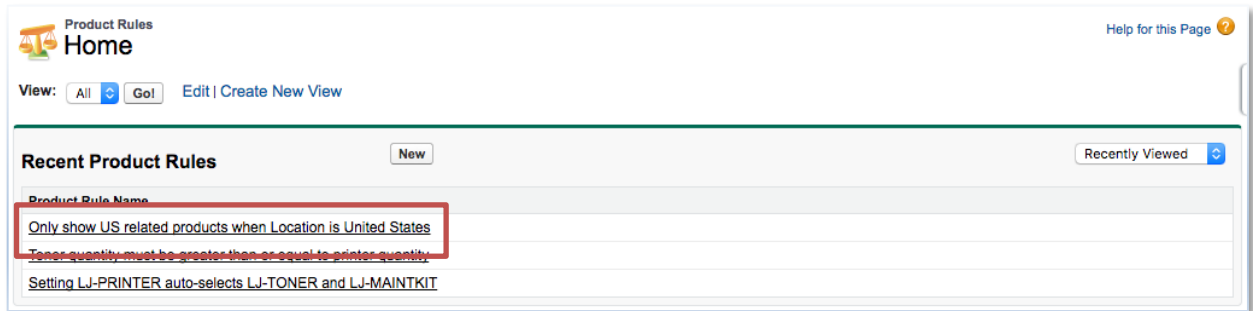


EX12: UK Items Product Rule

Objective: Clone and modify the US Items Product Rule to remove the US Keyboard and Letter-sized paper options should the sales rep choose United Kingdom for the Location configuration attribute.

1. Navigate to Product Rule tab
2. Click the link for the Only Show US Products rule



Product Rules Home

View: All Go! Edit | Create New View

Recent Product Rules

New

Recently Viewed

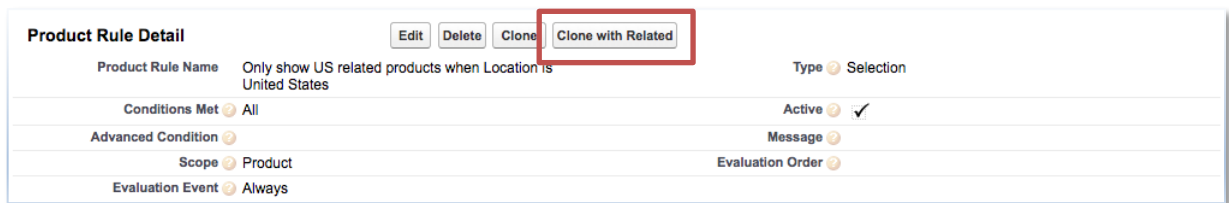
Product Rule Name

Only show US related products when Location is United States

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

Setting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT

3. Click Clone with Related



Product Rule Detail

Edit Delete Clone **Clone with Related**

Product Rule Name Only show US related products when Location is United States Type Selection

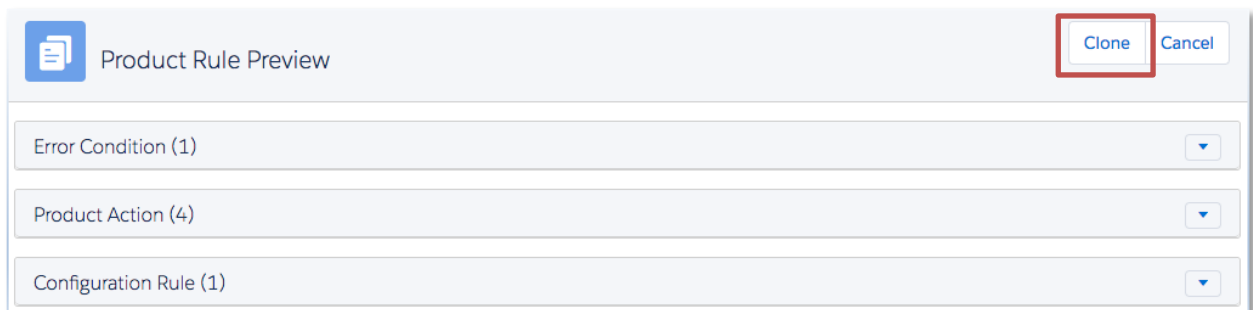
Conditions Met All Active ☒

Advanced Condition

Scope Product Message

Evaluation Event Always Evaluation Order

4. Click Clone



Product Rule Preview

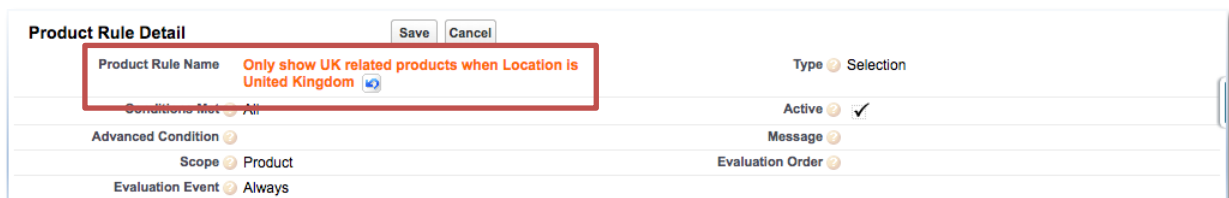
Clone Cancel

Error Condition (1)

Product Action (4)

Configuration Rule (1)

5. Update field value, then Save



Product Rule Detail

Save Cancel

Product Rule Name **Only show UK related products when Location is United Kingdom** Type Selection

Conditions Met All Active ☒

Advanced Condition

Scope Product Message

Evaluation Event Always Evaluation Order

6. Click the Edit link for the Error Condition

Actions New Product Action Actions Help ?

Action	Product Action #	Type	Product	Required	Filter Field	Operator	Filter Value	Value Object	Value Field
Edit Del	PA-0000006	Hide & Remove	LaserJet Paper A4	<input type="checkbox"/>					
Edit Del	PA-0000007	Show	LaserJet Paper Letter	<input type="checkbox"/>					
Edit Del	PA-0000008	Hide & Remove	Apple UK Keyboard	<input type="checkbox"/>					
Edit Del	PA-0000009	Show	Apple US Keyboard	<input type="checkbox"/>					

Error Conditions New Error Condition Error Conditions Help ?

Action	Condition #	Tested Variable	Operator	Filter Type	Filter Variable	Filter Value
Edit Del	000003		equals	Value		United States

7. Update field value, then Save

Information I = Required Information

Rule ☐ Only show UK related products when Location is United Kingdom

Tested Object ☐ Configuration Attributes

Tested Field ☐ Location__c

Tested Attribute ☐

Tested Variable ☐

Filter Information

Operator ☐ equals

Filter Type ☐ Value

Filter Value ☐ United Kingdom

Filter Variable ☐

8. Click the Edit link for the first Product Action

Actions New Product Action Actions Help ?

Action	Product Action #	Type	Product	Required	Filter Field	Operator	Filter Value	Value Object	Value Field
Edit Del	PA-0000006	Hide & Remove	LaserJet Paper A4	<input type="checkbox"/>					
Edit Del	PA-0000007	Show	LaserJet Paper Letter	<input type="checkbox"/>					
Edit Del	PA-0000008	Hide & Remove	Apple UK Keyboard	<input type="checkbox"/>					
Edit Del	PA-0000009	Show	Apple US Keyboard	<input type="checkbox"/>					

Error Conditions New Error Condition Error Conditions Help ?

Action	Condition #	Tested Variable	Operator	Filter Type	Filter Variable	Filter Value
Edit Del	000003		equals	Value		United Kingdom

9. Update field value, then Save

Information I = Required Information

Product Action # [PA-0000006](#)

Rule ☐ Only show UK related products when Location is United Kingdom

Type ☐ Show

Product ☐ LaserJet Paper A4

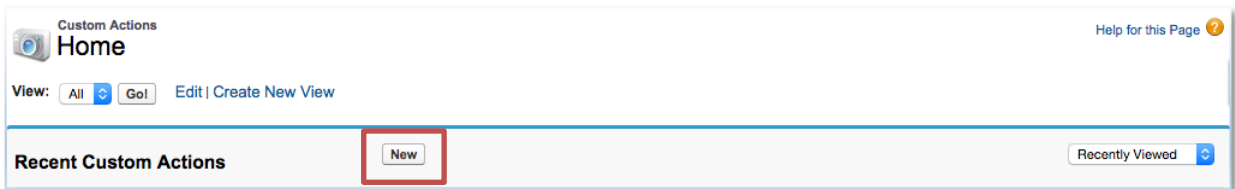
Required ☐

Repeat steps 8-9 for the remaining Product Actions, switching Hide & Remove to Show, and vice versa

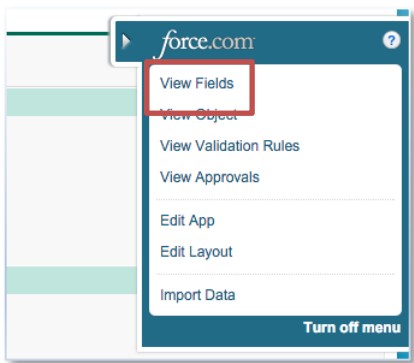
EX16: Hardware Products Custom Action

Objective: Create a button in the Quote Line Editor that when clicked, will only show products from the Hardware product family in the Product Selection screen.

- 1. Navigate to Custom Actions tab
- 2. Click New



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



- 4. Click the Label link

Edit	Icon Class	SBQQ__IconClass__c	SteelBrick CPQ	Text(100)	Admin User, 5/16/2016 1:12 PM
Edit Replace	Label	SBQQ__Label__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM
Edit Replace	Location	SBQQ__Location__c	SteelBrick CPQ	Picklist	Page Admin User, 5/16/2016 1:12 PM
Edit Replace	Page	SBQQ__Page__c	SteelBrick CPQ	Picklist	Admin User, 5/16/2016 1:12 PM

- 5. Click New in Values

Values						Values Help ?
<div>New Reorder Replace Printable View Chart Colors</div>						
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit Del Deactivate	Add Products	Add Products	<input checked="" type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	
Edit Del Deactivate	Add Favorites	Add Favorites	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	

6. Enter Add Hardware, then Save



A screenshot of a form header with a red box around the text 'Add Hardware'.

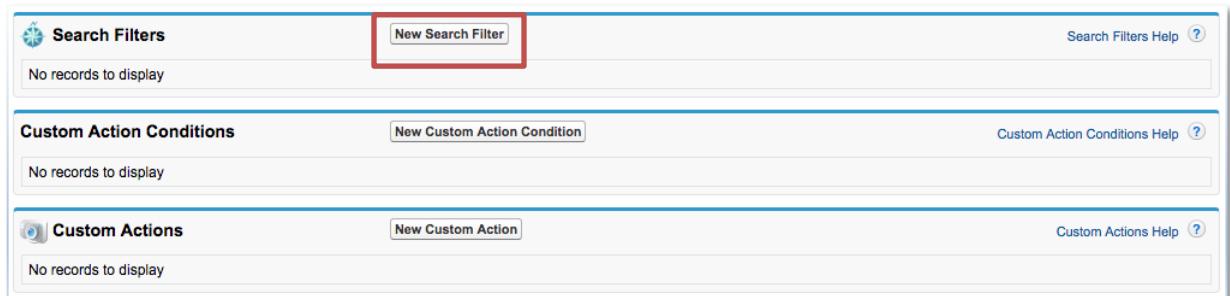
7. Return to the original Custom Action tab and refresh the page

8. Set field values, then Save



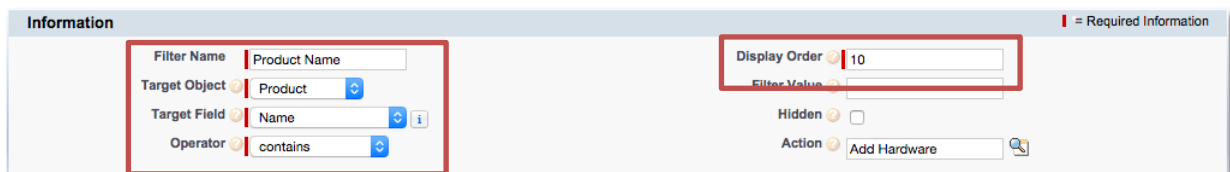
A screenshot of the 'Add Hardware' form. The 'Information' tab is active. Fields highlighted with red boxes include: Name (Add Hardware), Display Order (10), Type (Button), Parent (Custom Action), Active (checked), URL Target (--None--), URL, Page (Quote Line Editor), Location (Quote/Group), Action (Add Products), Icon (--None--), and Label (Add Hardware).

9. Click New Search Filter in Search Filters



A screenshot of the 'Search Filters' section. The 'New Search Filter' button is highlighted with a red box. Below it are sections for 'Custom Action Conditions' and 'Custom Actions', each with a 'New' button and a 'No records to display' message.

10. Set field values



A screenshot of the 'New Search Filter' form. The 'Information' tab is active. Fields highlighted with red boxes include: Filter Name (Product Name), Target Object (Product), Target Field (Name), Operator (contains), Display Order (10), Filter Value, Hidden (unchecked), and Action (Add Hardware).

11. Click Save & New

12. Set field values

Information ! = Required Information

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

13. Click Save & New

14. Set field values, then Save

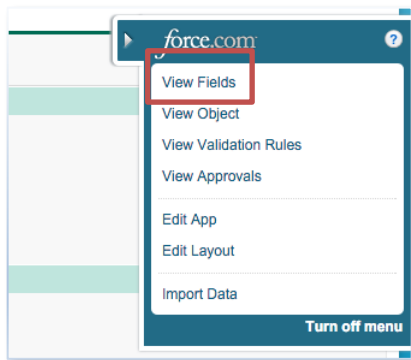
Information ! = Required Information

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

EX20: Guided Selling

Objective: Create a guided selling process to assist the sales rep in selecting the appropriate IT Pack based on responses to three simple questions that appear on the Product Selection page.

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



2. Click New in Custom Fields & Relationships

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

Product Custom Fields & Relationships								
			New	Field Dependencies				
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit Replace Download	Asset Conversion	SBQQ__AssetConversion__c	SteelBrick CPQ	Picklist			Admin User 5/16/2016 1:12 PM	<input type="checkbox"/>

3. Choose Picklist then click Next

☐ Phone Allows users to enter any phone number. Automatically formats it as a phone number.

☒ **Picklist** Allows users to select a value from a list you define.

☐ Picklist (Multi-Select) Allows users to select multiple values from a list you define.

☐ Text Allows users to enter any combination of letters and numbers.

☐ Text Area Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long) Allows users to enter up to 131,072 characters on separate lines.

☐ Text Area (Rich) Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

☐ Text (Encrypted) [i](#) Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ URL Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

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

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

Step 2. Enter the details Step 2 of 4

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

Field Label [i](#)

Values ☐ Use global picklist definition

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

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

☐ Use first value as default value

☒ Strictly enforce picklist values [i](#)

Field Name [i](#)

5. Click New in Custom Fields & Relationships

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

Product Custom Fields & Relationships						
		New	Field Dependencies			
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field
Edit Replace	Asset Conversion	SBQQ__AssetConversion__c	SteelBrick CPQ	Picklist		
						Modified By Admin User 5/16/2016 1:12 PM

6. Choose Picklist then click Next

☐ Phone Allows users to enter any phone number. Automatically formats it as a phone number.

☒ **Picklist** Allows users to select a value from a list you define.

☐ Picklist (Multi-Select) Allows users to select multiple values from a list you define.

☐ Text Allows users to enter any combination of letters and numbers.

☐ Text Area Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long) Allows users to enter up to 131,072 characters on separate lines.

☐ Text Area (Rich) Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

☐ Text (Encrypted) [i](#) Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ URL Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

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

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

Step 2. Enter the details Step 2 of 4

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

Field Label Deployment Setting [i](#)

Values

☐ Use global picklist definition

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

Commercial
Academic

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

☐ Use first value as default value

☒ Strictly enforce picklist values [i](#)

Field Name Deployment_Setting [i](#)

8. Click New in Custom Fields & Relationships

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

Product Custom Fields & Relationships								
			New	Field Dependencies				
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit Replace	Asset Conversion	SBQQ__AssetConversion__c	SteelBrick CPQ	Picklist			Admin User, 5/16/2016 1:12 PM	<input type="checkbox"/>

9. Choose Picklist (Multi-Select) then click Next

<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.
<input checked="" 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.

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

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label

Number of Users

Values

☐ Use global picklist definition

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

1-100

101-500

501+

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

☐ Use first value as default value

☒ Strictly enforce picklist values

11. Open the ITPROPACK and set fields, then Save

Product Detail		Edit	Delete	Clone	Clone With Related	Translate
Product Name	IT Professional Pack			Active	✓	
Product Code	ITPROPACK			Product Family	Service	
Product Family Filter	Service					
Is Bundle	Yes					
Deployment Type	Onsite					
Deployment Setting	Commercial					
Number of Users	1-100; 101-500					

12. Set remaining product fields per table:

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

Product	Deployment Type	Deployment Setting	Number of Users
IT Education Pack	Onsite	Academic	

13. Navigate to Setup | Create | Objects | Process Input

14. Click the Product Field link

Edit	Process Input Condition	SBQQ__ProcessInputCondition__c	SteelBrick CPQ	Lookup(Process Input Condition)	✓	Admin User , 5/16/2016 1:12 PM
Edit Replace	Product Field	SBQQ__ProductField__c	SteelBrick CPQ	Picklist		Admin User , 5/16/2016 1:12 PM
Edit	Quote Process	SBQQ__QuoteProcess__c	SteelBrick CPQ	Master-Detail(Quote Process)	✓	Admin User , 5/16/2016 1:12 PM

15. Click New in Values

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

16. Enter the API Names of the three recently created Product Fields, then Save

Add Picklist Values

Product Field

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

Deployment_Type__c
Deployment_Setting__c
Number_of_Users__c

17. Navigate back to the Process Input Object

Process Input Custom Field

Product Field (Managed)

[Back to Process Input](#)

[This Custom Field Definition is managed, meaning that you may only edit certain attributes. \[Display More Information\]\(#\)](#)

[Validation Rules](#) (0)

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

Field Information

Field Label	Product Field	Object Name	Process Input
Field Name	ProductField	Data Type	Picklist

18. Click New in Custom Fields & Relationships

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Input Name	Name	Text(80)		✓
	Last Modified By	LastModifiedBy	Lookup(User)		

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit	Active	SBQQ_Active__c	SteelBrick CPQ	Checkbox			Admin User, 5/16/2016 1:12 PM

19. Choose Picklist then click Next

☐ Phone
☒ Picklist
☐ Picklist (Multi-Select)
☐ Text
☐ Text Area
☐ Text Area (Long)
☐ Text Area (Rich)
☐ Text (Encrypted) [i](#)
☐ URL

Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Allows users to enter up to 255 characters on separate lines.
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Allows users to enter any combination of letters and numbers and store them in encrypted form.
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](#)

20. Set field values then click Next, Next

Step 2. Enter the details Step 2 of 4

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

Field Label: Deployment Type [i](#)

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

Onsite
Mobile

☐ Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.
☐ Use first value as default value
☒ Strictly enforce picklist values [i](#)

Field Name: Deployment_Type [i](#)

21. Uncheck the Add Field Checkbox, then click Save & New

Step 4. Add to page layouts Step 4 of 4

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

Field Label	Deployment Type
Data Type	Picklist
Field Name	Deployment_Type
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field — Page Layout Name

☐ Process Input Layout

22. Choose Picklist then click Next

☐ Phone Allows users to enter any phone number. Automatically formats it as a phone number.

☒ **Picklist** Allows users to select a value from a list you define.

☐ Picklist (Multi-Select) Allows users to select multiple values from a list you define.

☐ Text Allows users to enter any combination of letters and numbers.

☐ Text Area Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long) Allows users to enter up to 131,072 characters on separate lines.

☐ Text Area (Rich) Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

☐ Text (Encrypted) Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ URL Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

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

23. Set field values then click Next, Next

Step 2. Enter the details Step 2 of 4

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

Field Label [i](#)

Values ☐ Use global picklist definition

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

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

☐ Use first value as default value

☒ Strictly enforce picklist values [i](#)

Field Name [i](#)

24. Uncheck the Add Field Checkbox, then click Save & New

Step 4. Add to page layouts Step 4 of 4

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

Field Label: Deployment Setting
Data Type: Picklist
Field Name: Deployment_Setting
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field — Page Layout Name

☐ Process Input Layout

25. Choose Picklist then click Next

☐ Phone
☒ Picklist
☐ Picklist (Multi-Select)
☐ Text
☐ Text Area
☐ Text Area (Long)
☐ Text Area (Rich)
☐ Text (Encrypted) [i](#)
☐ URL

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

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](#)

26. Set field values, then click Next, Next

Step 2. Enter the details Step 2 of 4

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

Field Label: [i](#)

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

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

☐ Use first value as default value

☒ Strictly enforce picklist values [i](#)

27. Uncheck the Add Field Checkbox, then Save

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

Field Label: Number of Users
Data Type: Number
Field Name: Number_of_Users
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field ☐ Page Layout Name

☐ Process Input Layout

28. In a new tab open the Input Field link

<a>Edit	<a>Display Order	SBQQ__DisplayOrder__c	<a>SteelBrick CPQ	Number(8, 0)	<a>Admin User , 5/16/2016 1:12 PM
<a>Edit <a>Replace	<a>Input Field	SBQQ__InputField__c	<a>SteelBrick CPQ	Picklist	<a>Admin User , 5/16/2016 1:12 PM
<a>Edit	<a>Integer Input	SBQQ__IntegerInput__c	<a>SteelBrick CPQ	Number(18, 0)	<a>Admin User , 5/16/2016 1:12 PM

29. Click New in Values

Values New Reorder Replace Printable View Chart Colors Values Help

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

30. Enter the API names of the three fields created on the Process Input Object, then Save

Add Picklist Values
Input Field

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

Deployment_Type__c
Number_of_Users__c
Deployment_Setting__c

31. Navigate to Quote Processes tab

32. Click New

Quote Processes Home Help for this Page

View: All Go! Edit | Create New View

Recent Quote Processes New Recently Viewed

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

33. Set field values, then Save

Information ! = Required Information

Process Name IT Pack Guided Selling

Default ☐

Auto Select Product? ☐

Guided Only ☐

Owner Admin User

Product Configuration Initializer

Product Search Executor

Sort Order

34. Click New Process Input in Process Inputs

Quote Process Detail Edit Delete Clone

Process Name IT Pack Guided Selling

Owner Admin User [\[Change\]](#)

Default ☐

Auto Select Product? ☐

Guided Only ☐

Product Configuration Initializer

Product Search Executor

Sort Order

Created By Admin User, 5/17/2016 8:47 AM

Last Modified By Admin User, 5/17/2016 8:47 AM

Edit Delete Clone

Process Inputs New Process Input [Process Inputs Help ?](#)

No records to display

35. Set field values, then click Save & New

Process Input Edit Save Save & New Cancel

Information ! = Required Information

Input Name Deployment Type

Label What is the deployment method?

Display Order 10

Default Field --None--

Active ☒

Quote Process IT Pack Guided Selling

Input Field Deployment_Type__c

Conditions Met All

Product Filter

Product Field Deployment_Type__c

Operator equals

36. Set field values, then click Save & New

Process Input Edit Save Save & New Cancel

Information ! = Required Information

Input Name Deployment Setting

Label What is the Deployment Setting?

Display Order 20

Default Field --None--

Active ☒

Quote Process IT Pack Guided Selling

Input Field Deployment_Setting__c

Conditions Met All

Product Filter

Product Field Deployment_Setting__c

Operator equals

37. Set field values, then Save

Process Input Edit Save Save & New Cancel

Information = Required Information

Input Name
Label
Display Order
Default Field

Active ☒
Quote Process
Input Field
Conditions Met

Product Filter

Product Field
Operator

38. Navigate back to IT Pack Guided Selling Quote Process

Process Input Detail Edit Delete Clone

Input Name	Deployment Setting	Active	<input checked="" type="checkbox"/>
Label	What is the deployment setting?	Quote Process	<input type="text" value="IT Pack Guided Selling"/>
Display Order	30	Input Field	<input type="text" value="Deployment_Setting__c"/>
Default Field		Conditions Met	All

39. Click the Deployment Setting Process Input

Process Inputs New Process Input Process Inputs Help

Action	Input Name	Display Order	Product Field	Operator	Input Field
Edit Delete	Deployment Type	10	Deployment_Type__c	equals	Deployment_Type__c
Edit Delete	Deployment Setting	20	Deployment_Setting__c	equals	Deployment_Setting__c
Edit Delete	Number of Users	30	Number_of_Users__c	contains	Number_of_Users__c

40. Click New Process Input Condition in Process Input Conditions

Process Input Conditions New Process Input Condition Process Input Conditions Help

No records to display

41. Set field values, then Save

Process Input Condition Edit Save Save & New Cancel

Information = Required Information

Process Input Conditions Name
Process Input

Active ☒

Filter Information

Master Process Input
Operator
Value

42. Navigate back to the IT Pack Guided Selling Quote Process

Process Input Condition Detail [Edit] [Delete] [Clone]

Process Input Conditions Name: Onsite Packs

Process Input: Deployment Setting

▼ Filter Information

Master Process Input: Deployment Type

Operator: equals

Value: Onsite

Created By: Admin User, 6/

Process Input [View] [Edit]

Input Name: Deployment Type

Label: What is the Deployment method?

Display Order: 10

Quote Process: IT Pack Guided Selling

Input Field: Deployment_Type__c

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43. Click the Number of Users Process Input

Action	Input Name	Display Order	Product Field	Operator	Input Field
Edit Del	Deployment Type	10	Deployment_Type__c	equals	Deployment_Type__c
Edit Del	Deployment Setting	20	Deployment_Setting__c	equals	Deployment_Setting__c
Edit Del	Number of Users	30	Number_of_Users__c	contains	Number_of_Users__c

44. Click New Process Input Condition in Process Input Conditions

Process Input Conditions [New Process Input Condition] [Process Input Conditions Help ?]

No records to display

45. Set field values, then Save

Process Input Condition Edit [Save] [Save & New] [Cancel]

Information [= Required Information]

Process Input Conditions Name: Commercial Packs

Process Input: Number of Users

Active: ☒

Filter Information

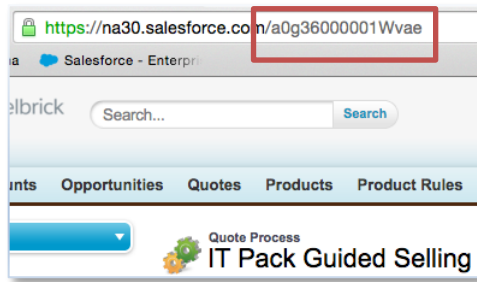
Master Process Input: Deployment Setting

Operator: equals

Value: Commercial

[Save]

46. Navigate to the quote process and copy the Salesforce ID from the URL



47. Navigate to a Quote

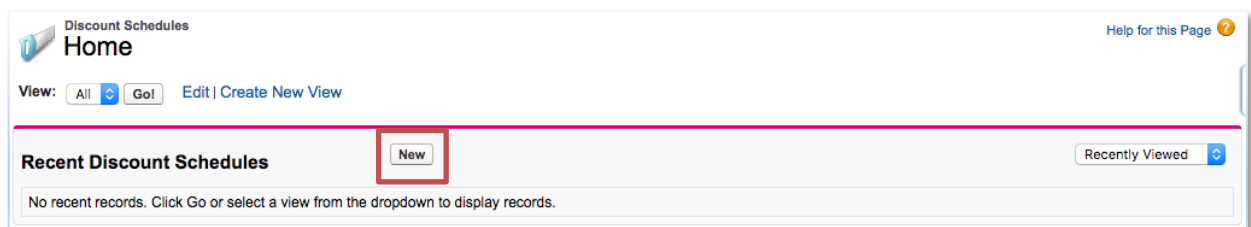
48. Paste the Salesforce ID into the Quote Process ID field on the Quote, then Save

A screenshot of the 'Quote Detail' form in Salesforce. The form contains various fields for quote information. At the bottom right, the 'Quote Process Id' field is highlighted with a red rectangular box and contains the value 'a0g36000001Wvae'. Other visible fields include 'Quote Number' (Q-00001), 'Status' (Draft), 'Expires On' (6/15/2016), 'Sales Rep' (Admin User), 'Primary Contact', 'Subscription Term' (12), 'Delivery Method', 'Master Contract', 'Opportunity' (First Big Sale), 'Net Amount' (\$0.00), 'Customer Amount' (\$0.00), 'Regular Amount' (\$0.00), 'List Amount' (\$0.00), 'Type' (Quote), 'Payment Terms' (Net 30), and 'Start Date' (6/1/2016). There are 'Save' and 'Cancel' buttons at the top right of the form.

EX23: Create a Discount Schedule

Objective: Create a discount schedule so that the customer receives a discount for buying greater quantities of LaserJet paper, increasing the discount for every 10 purchased up to a limit.

1. Navigate to Discount Schedules tab
2. Click New



3. Set field values, then Save

Information ! = Required Information

Schedule Name Owner

Type Cross Products ☐

Discount Unit Cross Orders ☐

Aggregation Scope Include Bundled Quantities ☐

Product Price Book

4. Set tiers, then Save

Edit Tiers Save Cancel

#	Tier Name	Lower Bound	Upper Bound	Discount (%)	
1	<input type="text" value="No Discount"/>	<input type="text" value="1.00"/>	<input type="text" value="11.00"/>	<input type="text" value="0"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	<input type="text" value="11-20 Units"/>	<input type="text" value="11.00"/>	<input type="text" value="21.00"/>	<input type="text" value="2"/>	<input type="button" value="+"/> <input type="button" value="-"/>
3	<input type="text" value="21-30 Units"/>	<input type="text" value="21.00"/>	<input type="text" value="31.00"/>	<input type="text" value="5"/>	<input type="button" value="+"/> <input type="button" value="-"/>
4	<input type="text" value="31-40 Units"/>	<input type="text" value="31.00"/>	<input type="text" value="41.00"/>	<input type="text" value="8"/>	<input type="button" value="+"/> <input type="button" value="-"/>
5	<input type="text" value="41+ Units"/>	<input type="text" value="41"/>	<input type="text"/>	<input type="text" value="10"/>	<input type="button" value="+"/> <input type="button" value="-"/>

5. Navigate to the LJ-PAPERLETTER product

6. Set Discount Schedule, then Save

Product Detail Save Cancel

Product Name Active ☒

Product Code Product Family

Created By Last Modified By

Product Description

▼ **SteelBrick Information**

Pricing Method Pricing Method Editable ☐

Quantity Editable ☒ Exclude From Opportunity ☐

Non Discountable ☒ Hidden ☐

Discount Schedule Lock Description ☐

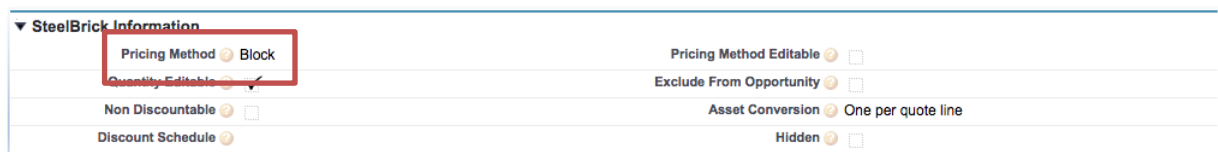
Price Editable ☐ Optional ☐

Cost Editable ☐ Sort Order

EX24: Block Pricing

Objective: Create block prices for the Toner Recycling product so that recycling any quantity between 1 and 20 results in a flat price; any quantity between 21-50 a different flat price; and any quantity above 50 an over price of \$1 per unit.

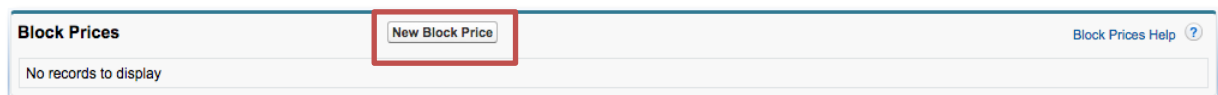
1. Navigate to the TONERRECYCLE product
2. Set Pricing Method, then Save



▼ SteelBrick Information

Pricing Method 🟡 Block	Pricing Method Editable 🟡 <input type="checkbox"/>
Quantity Editable 🟡 <input checked="" type="checkbox"/>	Exclude From Opportunity 🟡 <input type="checkbox"/>
Non Discountable 🟡 <input type="checkbox"/>	Asset Conversion 🟡 One per quote line
Discount Schedule 🟡	Hidden 🟡 <input type="checkbox"/>

3. Click New Block Price in Block Prices



Block Prices New Block Price Block Prices Help ?

No records to display

4. Set field values, then click Save & New



Information ! = Required Information

Price Name ! 1-20 Units	Owner Admin User
Lower Bound 🟡 1	Product ! Toner Recycling
Upper Bound 🟡 21	Price Book ! Standard Price Book
	Price 🟡 15.00

5. Set field values, then click Save & New

Information

Price Name 21-50 Units

Lower Bound 21

Upper Bound 51

Owner Admin User

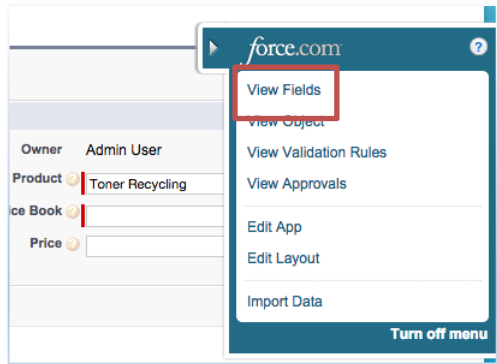
Product Toner Recycling

Price Book Standard Price Book

Price 25

= Required Information

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



7. Click New in Custom Fields & Relationships

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
	Last Modified By	LastModifiedBy	Lookup(User)		
Edit	Owner	Owner	Lookup(User,Queue)		✓
	Price Name	Name	Text(80)		✓

Custom Fields & Relationships

New

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By
Edit	Lower Bound	SBQQ__LowerBound__c	SteelBrick CPQ	Number(12, 0)			Admin User, 5/16/2016 1:12 PM
Edit	Price	SBQQ__Price__c	SteelBrick CPQ	Currency(16, 2)			Admin User, 5/16/2016 1:12 PM

8. Choose Currency 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.

Date/Time

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.

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

Step 2. Enter the details Step 2 of 4

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

Field Label ⓘ

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 ⓘ

10. Return to the Block Prices tab and refresh the page

11. Set field values, then Save

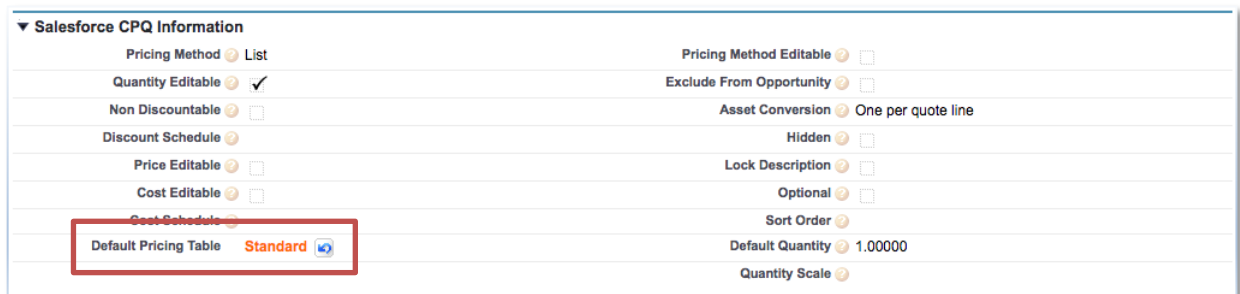
Information ! = Required Information

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

EX25: Multi-Dimensional Quoting

Objective: Allow sales reps to sell the Cloud Storage subscription product in yearly segments, where each segment may have a unique quantity, discount, and uplift. Also, include a one-time Activation fee to the Cloud Storage product.

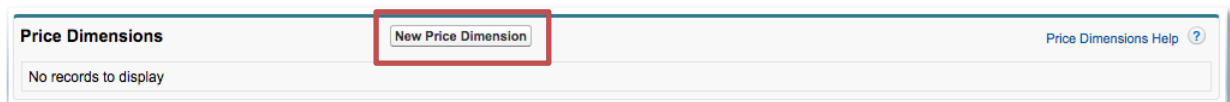
1. Navigate to the CLOUDSTORAGE product
2. Update field value, then Save



▼ Salesforce CPQ Information

Pricing Method ⓘ List	Pricing Method Editable ⓘ <input type="checkbox"/>
Quantity Editable ⓘ <input checked="" type="checkbox"/>	Exclude From Opportunity ⓘ <input type="checkbox"/>
Non Discountable ⓘ <input type="checkbox"/>	Asset Conversion ⓘ One per quote line
Discount Schedule ⓘ	Hidden ⓘ <input type="checkbox"/>
Price Editable ⓘ <input type="checkbox"/>	Lock Description ⓘ <input type="checkbox"/>
Cost Editable ⓘ <input type="checkbox"/>	Optional ⓘ <input type="checkbox"/>
Cost Schedule ⓘ	Sort Order ⓘ
Default Pricing Table ⓘ Standard ⓘ	Default Quantity ⓘ 1.00000
	Quantity Scale ⓘ

3. Click New Price Dimension in Price Dimensions



Price Dimensions New Price Dimension Price Dimensions Help ?

No records to display

4. Set field value, then click Save & New



Information ⓘ = Required Information

Product ⓘ Cloud Storage 1GB ⓘ	Quantity Editable ⓘ Inherit ⓘ
Dimension Name ⓘ Yearly Ramps ⓘ	Default Quantity ⓘ
Type ⓘ Year ⓘ	Quantity Scale ⓘ
Price Book ⓘ	

5. Set field values, then Save

Information ! = Required Information

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

Pricing

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