

EX1: Update Package Settings

Objective: Enable the calculation service introduced in Winter '16 so advanced features are available throughout further exercises.

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

Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits
Uninstall Configure Manage Licenses	Salesforce CPQ	Salesforce CPQ Dev	208.1	SBQQ	Trial	99000000	1	10/4/2017	7/6/2017 1:32 PM	

3. Click Authorize new calculation service

Settings Editor
Salesforce CPQ

Save Cancel

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

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

Currency Symbol

Unit Price Scale

Enable Quick Calculate ☐

Allow Non-Consecutive Custom Segments ☐

Use Legacy Calculator ☐

Use Inactive Prices ☐

Calculate Immediately ☐

Disable Background Calculation Refresh ☐

[Authorize new calculation service](#)

4. Click Allow

salesforce

Allow Access?

SteelBrick CPQ is asking to:

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

Do you want to allow access for brian@cloutier012015.com?

Deny [Allow](#)

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

EX2: Update Product Fields

Objective: Change how specific products behave when added to a Salesforce CPQ quote, mainly in regards to subscription pricing calculations.

1. Navigate to Products | Cloud Storage 1GB
2. Update field values, then Save

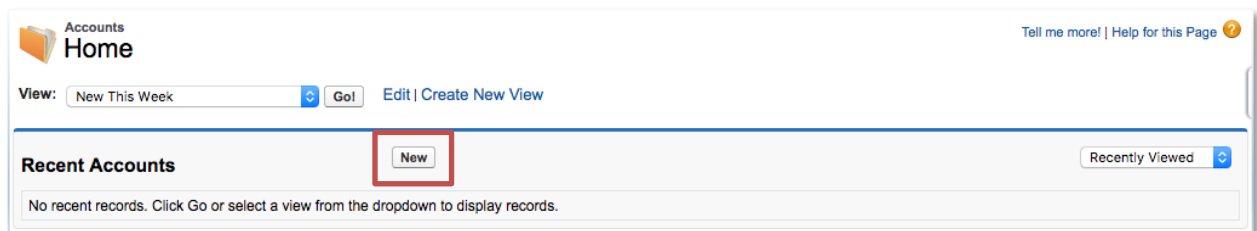
3. Update remaining products per table:

Product Code	Sub Pricing	Sub Term	PoT Category	PoT %	Qty Edit	Non Disc
ADMINHOUR	Fixed Price	1				
AP-TBDISPLAY			Hardware			
CLOUDSTORAGE	Fixed Price	12				
ITPROPACK					False	True
LJ-PRINTER			Hardware			
LDWARRANTY	Percent of Total	12	Hardware	5.0		
MS-OFFICE365	Fixed Price	1				True
WARRANTY	Percent of Total	12	Hardware	0.5		
WIFIROUTER			Hardware			

EX3: Create Sample CPQ Quote

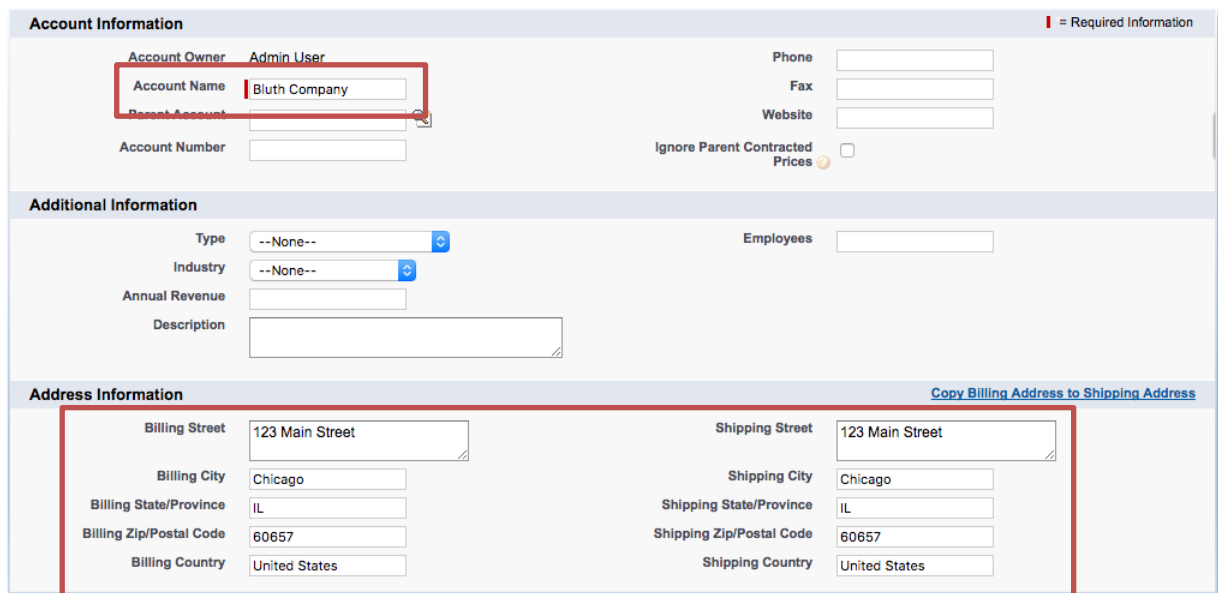
Objective: Create a Salesforce CPQ quote to experience the typical process a sales rep might complete, as well as create a quote record that may be used for further testing.

1. Navigate to Accounts tab
2. Click New



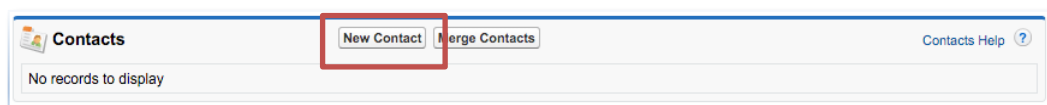
The screenshot shows the Salesforce Accounts Home page. At the top, there's a 'Home' header with a folder icon. Below it, a 'View:' dropdown is set to 'New This Week', with 'Go!' and 'Edit | Create New View' links. The main section is titled 'Recent Accounts' and contains a 'New' button highlighted with a red box. A 'Recently Viewed' dropdown is on the right. A message at the bottom states: 'No recent records. Click Go or select a view from the dropdown to display records.'

3. Set field values, then Save



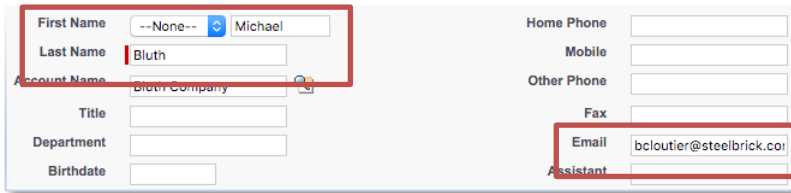
The screenshot shows the 'Account Information' form in Salesforce. The 'Account Name' field is highlighted with a red box and contains the text 'Bluth Company'. Other fields include 'Account Owner' (Admin User), 'Phone', 'Fax', 'Website', 'Account Number', and 'Ignore Parent Contracted Prices' (checkbox). Below this is the 'Additional Information' section with fields for 'Type', 'Industry', 'Annual Revenue', and 'Description'. The 'Address Information' section at the bottom has fields for 'Billing Street', 'Billing City', 'Billing State/Province', 'Billing Zip/Postal Code', 'Billing Country', and corresponding 'Shipping' fields. The 'Billing Street' and 'Shipping Street' fields are highlighted with a red box and contain '123 Main Street'. A link 'Copy Billing Address to Shipping Address' is visible. A legend at the top right indicates 'I = Required Information'.

4. Click New Contact



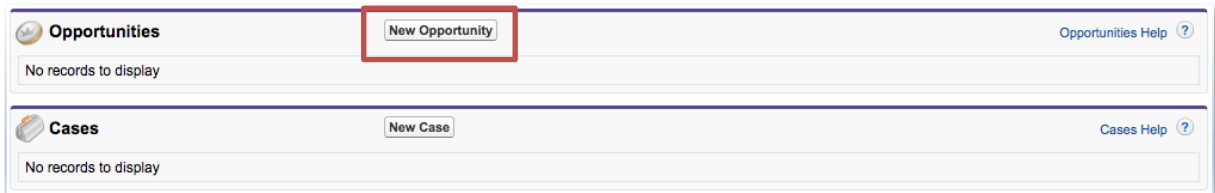
The screenshot shows the Salesforce Contacts page. At the top, there's a 'Contacts' header with a folder icon. Below it, a 'New Contact' button is highlighted with a red box, followed by a 'Merge Contacts' button. A 'Contacts Help' link with a question mark icon is on the right. The main section displays 'No records to display'.

5. Set field values, then Save



First Name: --None-- Michael
Last Name: Bluth
Account Name: Bluth Company
Title:
Department:
Birthdate:
Home Phone:
Mobile:
Other Phone:
Fax:
Email: bcloutier@steelbrick.coi
Assistant:

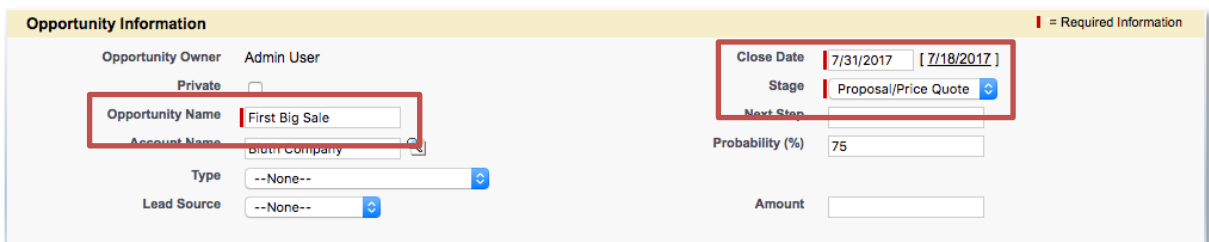
6. Click New Opportunity



Opportunities [New Opportunity](#) [Opportunities Help](#)
No records to display

Cases [New Case](#) [Cases Help](#)
No records to display

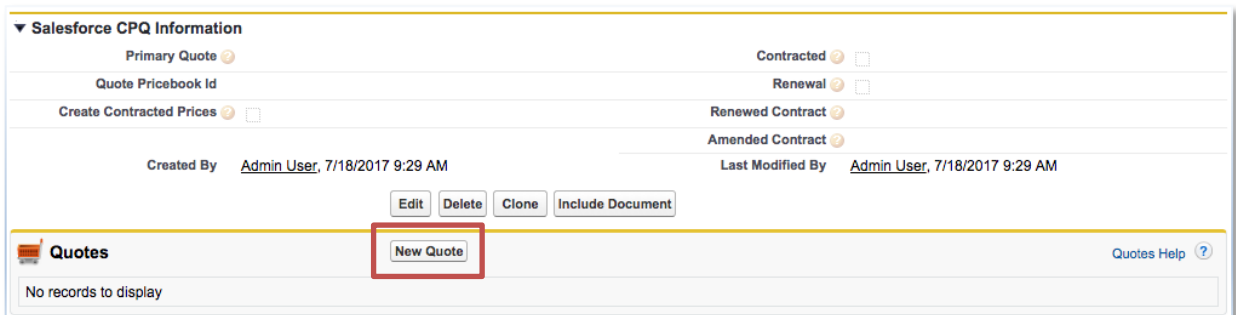
7. Set field values, then Save



Opportunity Information ! = Required Information

Opportunity Owner: Admin User
Private: ☐
Opportunity Name: First Big Sale
Account Name: Bluth Company
Type: --None--
Lead Source: --None--
Close Date: 7/31/2017 [7/18/2017]
Stage: Proposal/Price Quote
Next Step:
Probability (%): 75
Amount:

8. Click New Quote



Salesforce CPQ Information

Primary Quote [?](#)
Quote Pricebook Id:
Create Contracted Prices ☐
Contracted ☐
Renewal ☐
Renewed Contract [?](#)
Amended Contract [?](#)
Created By: Admin User, 7/18/2017 9:29 AM
Last Modified By: Admin User, 7/18/2017 9:29 AM
[Edit](#) [Delete](#) [Clone](#) [Include Document](#)

Quotes [New Quote](#) [Quotes Help](#)
No records to display

9. Set field values, then Save



Information

Primary ☒

Status

Expires On 8/17/2017 [7/18/2017]

Sales Rep

Primary Contact

Subscription Term 12

Delivery Method

Master Contract

Opportunity First Big Sale

Type Quote

Payment Terms Net 30

Start Date 8/1/2017 [7/18/2017]

End Date

Quote Process Id

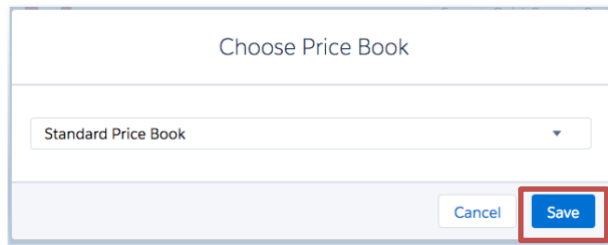
Account

Price Book

Contracting Method By Subscription End Date

First Segment Term End Date

10. Click Save to Choose Price Book popup

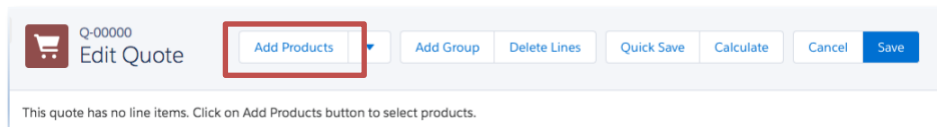


Choose Price Book

Standard Price Book

Cancel Save

11. Click Add Products

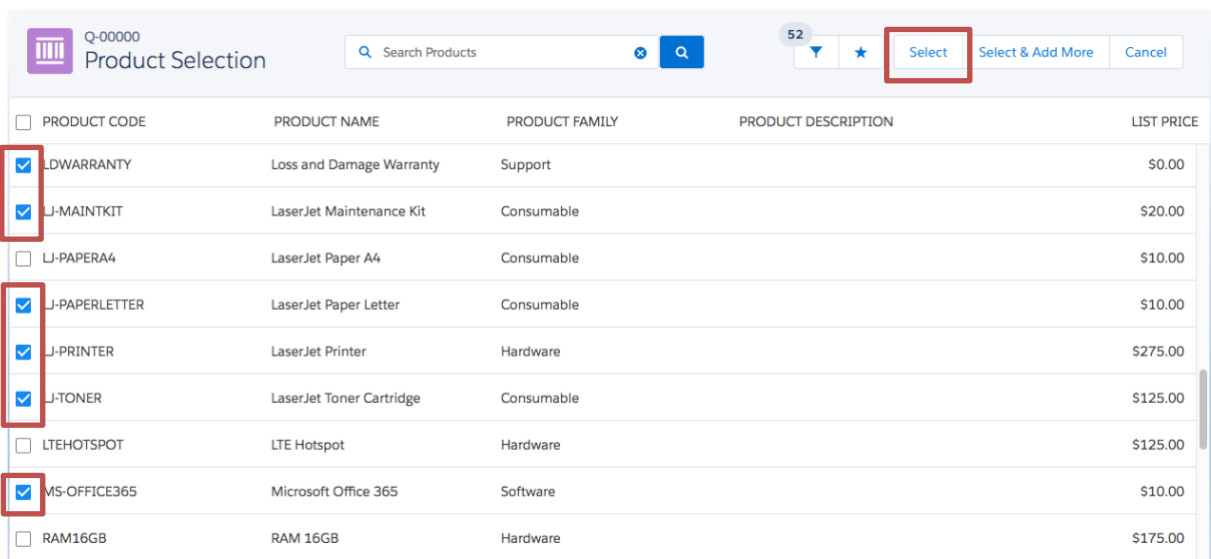


Q-00000 Edit Quote

Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

This quote has no line items. Click on Add Products button to select products.

12. Choose these products, then click Select



Q-00000 Product Selection


Search Products

52

Select Select & Add More Cancel

PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input checked="" type="checkbox"/> LDWARRANTY	Loss and Damage Warranty	Support		\$0.00
<input checked="" type="checkbox"/> LJ-MAINTKIT	LaserJet Maintenance Kit	Consumable		\$20.00
<input type="checkbox"/> LJ-PAPERA4	LaserJet Paper A4	Consumable		\$10.00
<input checked="" type="checkbox"/> J-PAPERLETTER	LaserJet Paper Letter	Consumable		\$10.00
<input checked="" type="checkbox"/> J-PRINTER	LaserJet Printer	Hardware		\$275.00
<input checked="" type="checkbox"/> J-TONER	LaserJet Toner Cartridge	Consumable		\$125.00
<input type="checkbox"/> LTEHOTSPOT	LTE Hotspot	Hardware		\$125.00
<input checked="" type="checkbox"/> MS-OFFICE365	Microsoft Office 365	Software		\$10.00
<input type="checkbox"/> RAM16GB	RAM 16GB	Hardware		\$175.00

13. Enter these quantities, click Calculate to verify subtotal, then click Save

 Q-00000
Edit Quote

Add Products

Add Group

Delete Lines

Quick Save

Calculate

Cancel

Save

<input type="checkbox"/>	#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL	
<input type="checkbox"/>	1	LDWARRANTY	Loss and Damage Warranty	1.00	\$27.50		\$27.50	\$27.50	☆ 📄 🗑️
<input type="checkbox"/>	2	LJ-MAINTKIT	LaserJet Maintenance Kit	2.00	\$20.00		\$20.00	\$40.00	☆ 📄 🗑️
<input type="checkbox"/>	3	LJ-PAPERLETTER	LaserJet Paper Letter	10.00	\$10.00		\$10.00	\$100.00	☆ 📄 🗑️
<input type="checkbox"/>	4	LJ-PRINTER	LaserJet Printer	2.00	\$275.00		\$275.00	\$550.00	☆ 📄 🗑️
<input type="checkbox"/>	5	LJ-TONER	LaserJet Toner Cartridge	4.00	\$125.00		\$125.00	\$500.00	☆ 📄 🗑️
<input type="checkbox"/>	6	MS-OFFICE365	Microsoft Office 365	20.00	\$10.00		\$120.00	\$2,400.00	☆ 📄 🗑️
							SUBTOTAL:	\$3,617.50	

EX4: Create Features

Objective: Create Features that will give the ITPROPACK bundle some organization once Product Options are created. The effect of this exercise is only seen after EX5 is complete.

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

▼ SteelBrick Assets
Asset Conversion ⓘ One per quote line

Edit Delete Clone Clone With Related

Features New Product Feature Features Help ?

No records to display

Options New Product Option Options Help ?

No records to display

3. Set field values, then Save

Information ⓘ = Required Information

Feature Name ⓘ Computers

Min Options ⓘ 0

Max Options ⓘ

Category ⓘ --None--

Discount Schedule ⓘ

Number ⓘ 10

Configured SKUs ⓘ IT Professional Pack

Option Selection Method ⓘ --None--

Dynamic Option Filter Field Set ⓘ --None--

Dynamic Option Lookup Field Set ⓘ --None--

4. Create remaining features per screenshot:

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

EX5: Create Options

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

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

Features New Product Feature Features Help ?

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

Options New Product Option Options Help ?

No records to display

3. Set field values, then Save

Information = Required Information

Number Quantity Quantity Editable ☒ Selected ☒

Required ☐ Min Quantity Max Quantity Discount Schedule

Configured SKU Optional SKU Feature Type

Bundled ☐ Unit Price Discount (%) Discount (Amt)

4. Create remaining options per table:

Optional SKU	Feature	Type	Num	Qty	Qty Edit	Select	Min Qty
Apple MacBook Pro	Computers	Related Product	10	1	True	True	
Apple US Keyboard	Peripherals	Related Product	10	1	True		
Apple UK Keyboard	Peripherals	Related Product	20	1	True		
Apple Magic Mouse	Peripherals	Related Product	30	1	True		
Apple Thunderbolt Display	Peripherals	Related Product	40	1	True		

Optional SKU	Feature	Type	Num	Qty	Qty Edit	Select	Min Qty
LaserJet Printer	Printing	Accessory	10	1	True		
LaserJet Toner Cartridge	Printing	Accessory	20	1	True		
LaserJet Maintenance Kit	Printing	Accessory	30	1			
LaserJet Paper Letter	Printing	Related Product	40	1	True		
LaserJet Paper A4	Printing	Related Product	50	1	True		
WiFi Router	Networking	Accessory	10	1			
WiFi Access Point	Networking	Accessory	20	1			
WiFi Installation	Networking	Accessory	30	1			
Warranty	Subscriptions	Accessory	10	1			
Loss and Damage Warranty	Subscriptions	Accessory	20	1			
Microsoft Office 365	Subscriptions	Related Product	30	1	True		
Cloud Storage 1GB	Subscriptions	Related Product	40				
Admin Hour	Subscriptions	Accessory	50	20	True		10

5. Navigate to the ITPROPACK product

6. Set field values, then Save

Salesforce CPQ Configuration

Configuration Type
Allowed

Configuration Event
Always

Option Layout

Option Selection Method
Click

Configuration Fields

Configuration Form Title

Configured Code Pattern

Disable Reconfiguration
☐

Configured Description Pattern

EX6: Create Option Constraints

Objective: Prevent the sales rep from mistakenly selling products such as the WiFi Access Point and WiFi Installation without the requisite WiFi Router. Also, prevent the sales rep from selling more than one type of warranty. All constraints apply only to the ITPROPACK.

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

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

Option Constraints [New Option Constraint](#) [Option Constraints Help](#) ?
No records to display

Configuration Attributes [New Configuration Attribute](#) [Configuration Attributes Help](#) ?
No records to display

3. Set field values, then click Save & New

Information *Installation Option* ! = Required Information

Constraint Name ! WiFi Installation requires WiFi Router

Constrained Option ! PO-000019 [?](#) [i](#)

Constraining Option ! PO-000017 [?](#) [i](#)

☐ Check Prior Purchases

Active ! ☒

Configured SKU ! IT Professional Pack [x](#) [?](#) [i](#)

Type ! Dependency [?](#)

Option Constraint Group !

Router Option

4. Set field values, then click Save & New

Information *Access Point Option* ! = Required Information

Constraint Name ! WiFi Access Point require WiFi Router

Constrained Option ! PO-000018 [?](#) [i](#)

Constraining Option ! PO-000017 [?](#) [i](#)

☒ Check Prior Purchases

Active ! ☒

Configured SKU ! IT Professional Pack [x](#) [?](#) [i](#)

Type ! Dependency [?](#)

Option Constraint Group !

Router Option

5. Set field values, then Save

Information *Warranty Option* ! = Required Information

Constraint Name ! Only one warranty may be selected

Constrained Option ! PO-000020 [?](#) [i](#)

Constraining Option ! PO-000021 [?](#) [i](#)

☐ Check Prior Purchases

Active ! ☒

Configured SKU ! IT Professional Pack [x](#) [?](#) [i](#)

Type ! Exclusion [?](#)

Option Constraint Group !

LD Warranty Option

EX7: Create Option Constraint with Grouping

Objective: Prevent the sales rep from selling Cloud Storage unless both the WiFi Router AND the WiFi Access Point have been selected. This constraint only applies to the ITPROPACK.

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

Option Constraints New Option Constraint Option Constraints Help ?

Action	Constraint Name
Edit Del	Wifi installation requires WIFI Router
Edit Del	WiFi access point requires WIFI Router
Edit Del	Only one warranty may be selected

3. Set field values, then click Save & New

Information Cloud Storage Option = Required Information

Constraint Name: Cloud Storage requires WiFi Router

Constrained Option: PO-000095

Constraining Option: PO-000089

Active: ☒

Configured SKU: IT Professional Pack

Type: Dependency

Option Constraint Group: Cloud

Router Option

4. Set field values, then Save

Information Cloud Storage Option = Required Information

Constraint Name: Cloud Storage requires WiFi Access Points

Constrained Option: PO-000095

Constraining Option: PO-000090

Active: ☒

Configured SKU: IT Professional Pack

Type: Dependency

Option Constraint Group: Cloud

Access Point Option

EX8: Printer Options Product Rule

Objective: Automatically check the LaserJet toner and maintenance kit options when the sales rep selects the printer options, so as to remind the sales rep that those options are frequently sold together when configuring the ITPROPACK.

1. Navigate to Product Rule tab
2. Click New

The screenshot shows the 'Product Rules Home' page. At the top, there's a 'View:' dropdown set to 'All' and a 'Go!' button. Below this is a 'Recent Product Rules' section with a 'New' button highlighted by a red box. A message below states: 'No recent records. Click Go or select a view from the dropdown to display records.'

3. Set field values, then Save

The screenshot shows the 'Information' section of the Product Rule configuration form. The 'Product Rule Name' field contains 'Setting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT'. The 'Conditions Met' dropdown is set to 'All'. The 'Scope' dropdown is set to 'Product'. The 'Evaluation Event' dropdown is set to 'Always'. The 'Type' dropdown is set to 'Selection'. The 'Active' checkbox is checked. The 'Message' field is empty. The 'Evaluation Order' field is empty.

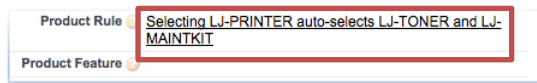
4. Click New Configuration Rule in Configuration Rules

The screenshot shows the 'Configuration Rules' section. It has a 'New Configuration Rule' button highlighted with a red box. Below the button, it says 'No records to display'. There are also sections for 'Actions', 'Error Conditions', and 'Lookup Queries (Product Rule)', each with a 'New' button and 'No records to display' message.

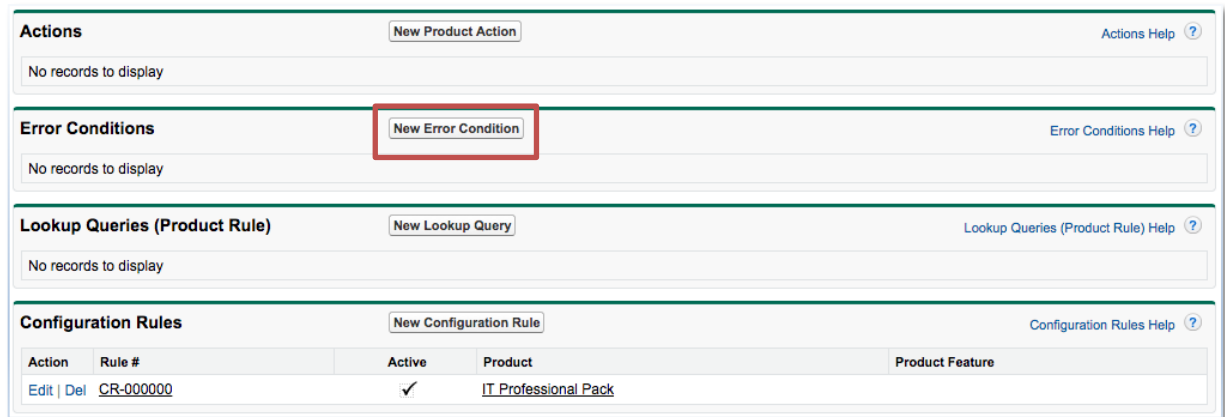
5. Set field values, then Save

The screenshot shows the 'Information' section of the Configuration Rule configuration form. The 'Active' checkbox is checked. The 'Product' dropdown is set to 'IT Professional Pack'. The 'Product Rule' dropdown is set to 'Selecting LJ-PRINTER at'. The 'Product Feature' field is empty.

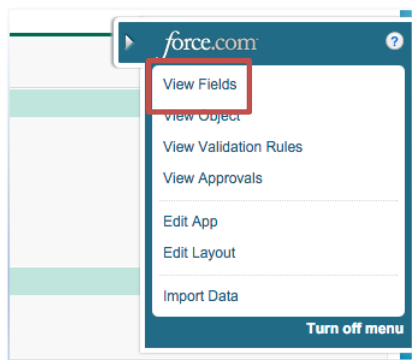
6. Navigate back to the Product Rule



7. Click New Error Condition in Error Conditions



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



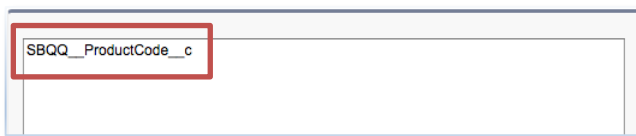
9. Click the Tested Field link

Edit	Rule	SBQQ__Rule__c	SteelBrick CPQ	Master-Detail(Product Rule)	✓	Admin User , 5/16/2016 1:12 PM
Edit Replace	Tested Field	SBQQ__TestedField__c	SteelBrick CPQ	Picklist	Tested Object	Admin User , 5/16/2016 1:12 PM
Edit Replace	Tested Object	SBQQ__TestedObject__c	SteelBrick CPQ	Picklist		Admin User , 5/16/2016 1:12 PM

10. Click New in Values

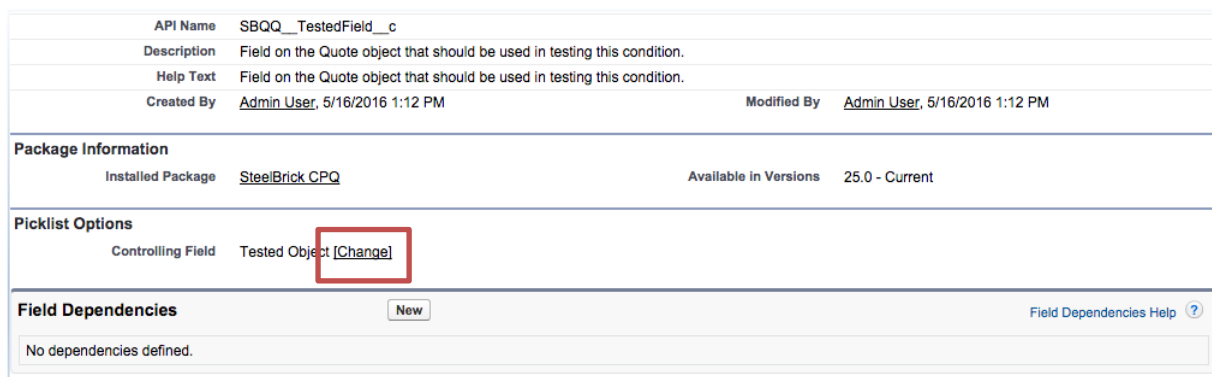
Values						Values Help ?
New Reorder Replace Printable View Chart Colors ▼						
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit Del Deactivate	Group Line Items	Group Line Items	<input type="checkbox"/>	Assigned dynamically	Admin User , 7/18/2017 8:26 AM	
Edit Del Deactivate	Unit Price	Unit Price	<input type="checkbox"/>	Assigned dynamically	Admin User , 7/18/2017 8:26 AM	

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



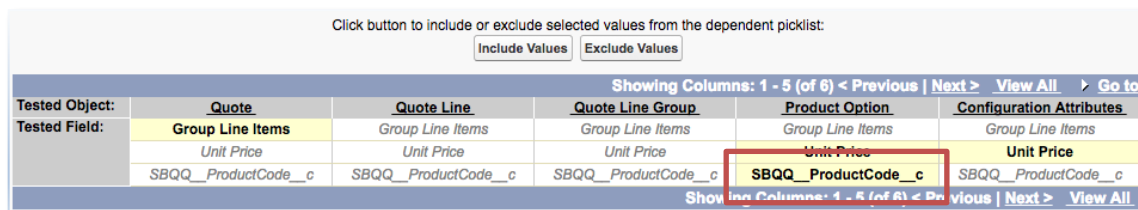
A screenshot of a form with a red rectangular box highlighting the text "SBQQ__ProductCode__c" in the first input field.

12. Click the Change link next to Tested Object



A screenshot of a configuration page for a field dependency. The page has several sections: "API Name" (SBQQ__TestedField__c), "Description" (Field on the Quote object that should be used in testing this condition.), "Help Text" (Field on the Quote object that should be used in testing this condition.), "Created By" (Admin User, 5/16/2016 1:12 PM), and "Modified By" (Admin User, 5/16/2016 1:12 PM). Below these are sections for "Package Information" (Installed Package: SteelBrick CPQ, Available in Versions: 25.0 - Current), "Picklist Options" (Controlling Field: Tested Object, Tested Object: [Change]), and "Field Dependencies" (New, Field Dependencies Help). A red box highlights the "[Change]" link next to the "Tested Object" field.

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

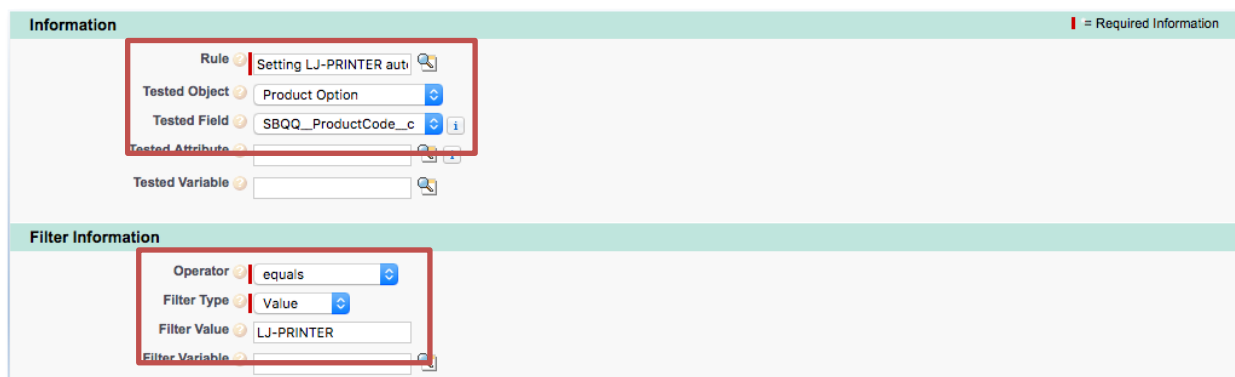


A screenshot of a table showing field dependencies. The table has columns for "Tested Object", "Tested Field", and various field names. The "Tested Object" column has values: Quote, Quote Line, Quote Line Group, Product Option, and Configuration Attributes. The "Tested Field" column has values: Group Line Items, Unit Price, and SBQQ__ProductCode__c. A red box highlights the "SBQQ__ProductCode__c" field under the "Product Option" column.

14. Click OK if a warning popup appears

15. Navigate back to the Error Condition and refresh the page

16. Set field values, then Save



A screenshot of a configuration page for a rule. The page has two main sections: "Information" and "Filter Information". The "Information" section has fields for "Rule" (Setting LJ-PRINTER auto), "Tested Object" (Product Option), "Tested Field" (SBQQ__ProductCode__c), "Tested Attribute", and "Tested Variable". The "Filter Information" section has fields for "Operator" (equals), "Filter Type" (Value), "Filter Value" (LJ-PRINTER), and "Filter Variable". A red box highlights the "Rule" and "Tested Object" fields in the "Information" section.

17. Navigate back to the Product Rule

18. Click New Product Action in Actions

Actions New Product Action Actions Help ?

No records to display

Error Conditions New Error Condition Error Conditions Help ?

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

19. Set field values, then click Save & New

Information = Required Information

Rule Selecting LJ-PRINTER a

Type Add

Product LaserJet Toner Cartridge

Required ☒

20. Set field values, then click Save

Information = Required Information

Rule Selecting LJ-PRINTER a

Type Add

Product LaserJet Maintenance K

Required ☒

21. Navigate back to the ITPROPACK

22. Select the LJ-PRINTER Product Option

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

23. Check the Apply Immediately checkbox, then Save

☐ Quote Line Visibility

☐ Percent of Total Scope

☐ Discounted By Package

☐ Uplifted By Package

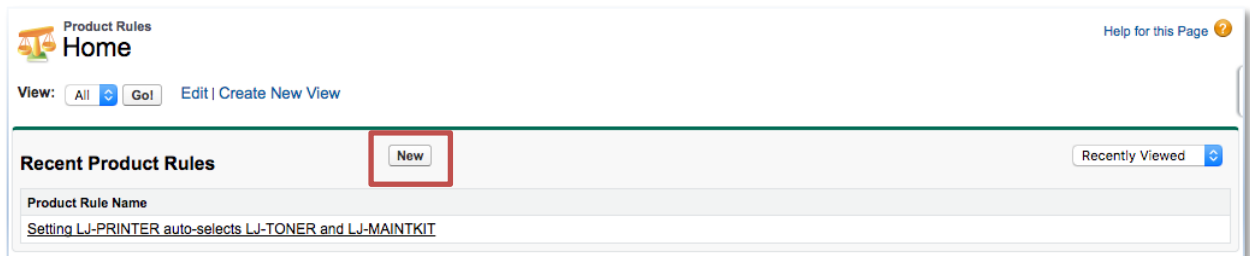
☒ Apply Immediately

☐ Apply Immediately Context

EX9: Toner Quantity Product Rule

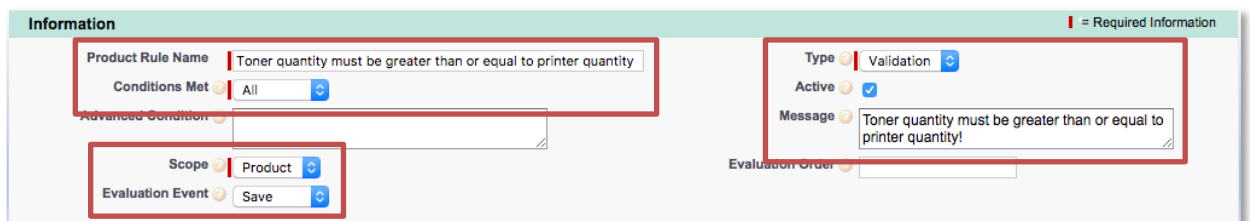
Objective: Prevent the sales rep from saving the ITPROPACK configuration when they have included too few toners for the number of printers selected. Sales reps must sell at least as many toners as printers.

1. Navigate to Product Rule tab
2. Click New



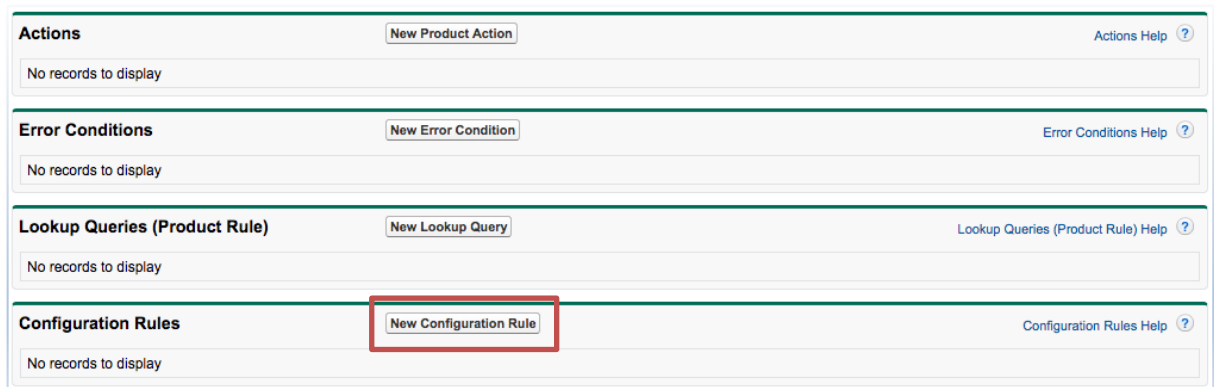
The screenshot shows the 'Product Rules Home' page. At the top, there's a 'View:' section with 'All' selected and a 'Go!' button. Below that, the 'Recent Product Rules' section is visible, showing a rule named 'Setting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT'. A red box highlights the 'New' button in the top right corner of the 'Recent Product Rules' section.

3. Set field values, then Save



The screenshot shows the 'Information' section of the Product Rule configuration form. Several fields are highlighted with red boxes: 'Product Rule Name' (containing 'Toner quantity must be greater than or equal to printer quantity'), 'Conditions Met' (set to 'All'), 'Scope' (set to 'Product'), 'Evaluation Event' (set to 'Save'), 'Type' (set to 'Validation'), 'Active' (checked), and 'Message' (containing 'Toner quantity must be greater than or equal to printer quantity!').

4. Click New Configuration Rule in Configuration Rules



The screenshot shows the 'Configuration Rules' section of the interface. It lists four categories: 'Actions', 'Error Conditions', 'Lookup Queries (Product Rule)', and 'Configuration Rules'. Each category has a 'New' button. The 'New Configuration Rule' button under the 'Configuration Rules' category is highlighted with a red box.

5. Set field values, then Save

Information ! = Required Information

Active ☒

Product

Product Rule

Product Feature

6. Navigate back to the Product Rule

Product Rule

Product Feature

Created By

Last Modified By

7. In a new tab, navigate to Summary Variables

8. Click New

Summary Variables Help for this Page ?

Home

View:

Recent Summary Variables

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

9. Set field values, then click Save & New

Information ! = Required Information

Variable Name

Target Object

Aggregate Function

Aggregate Field

Filter Information

Filter Field

Filter Value

Operator

Composite Information

Composite Operator

Variable Element

Value Element

10. Set field values, then Save

Information ! = Required Information

Variable Name

Target Object

Aggregate Function

Aggregate Field

Filter Information

Filter Field

Filter Value

Operator

Composite Information

Composite Operator

Variable Element

Value Element

11. Navigate back to the incomplete Product Rule tab
12. Click New Error Condition in Error Conditions

The screenshot shows a configuration interface with four tabs: **Actions**, **Error Conditions**, **Lookup Queries (Product Rule)**, and **Configuration Rules**. Each tab has a 'New' button and a 'Help' link. The **Error Conditions** tab is active, and the **New Error Condition** button is highlighted with a red box. Below the tabs, there is a table for Configuration Rules.

Action	Rule #	Active	Product	Product Feature
Edit Del	CR-000001	<input checked="" type="checkbox"/>	IT Professional Pack	

13. Set field values, then Save

The screenshot shows the **Error Condition Edit** form. The **Information** section contains the following fields:

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

The **Filter Information** section contains the following fields:

- Operator**: less than
- Filter Type**: Variable
- Filter Value**:
- Filter Variable**: Total quantity of LJ-Prin

Red boxes highlight the **Tested Variable** and **Filter Information** sections. At the bottom, there are **Save**, **Save & New**, and **Cancel** buttons.

EX10: Create Configuration Attributes

Objective: Create a Location field that is visible when configuring the ITPROPACK. The values gathered by the configuration attribute will be used to drive logic in EX11, EX12, and EX14, but will also be saved to the Quote Line record of each bundle for future reference.

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

Action	Field Label	Field Name	Data Type	Controlling Field
	Created By	CreatedBy	Lookup(User)	
	Last Modified By	LastModifiedBy	Lookup(User)	
	Option Name	Name	Auto Number	
Edit	Owner	Owner	Lookup(User,Queue)	

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field
Edit	Apply Immediately	SBQQ__AppliedImmediately__c	SteelBrick CPQ	Checkbox		

3. 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](#)

- Set field values, click Next, Next, then click Save

The screenshot shows a form titled "Step 2. Enter the details" with a "Step 2 of 4" indicator in the top right. In the top right corner, there are buttons for "Previous", "Next", and "Cancel". The main form area has a "Field Label" section with a text input containing "Location" and an information icon. Below this is a "Values" section with two radio buttons: "Use global picklist value set" (unselected) and "Enter values, with each value separated by a new line" (selected). Under the selected option, there is a text area containing "United States" and "United Kingdom". A red rectangular box highlights the "Field Label" and "Values" sections.

- Navigate to the ITPROPACK product
- Click New Configuration Attribute in the Configuration Attributes related list

The screenshot shows a table with two rows of configuration attributes. The first row is "Cloud Storage requires WiFi Router" and the second row is "Cloud Storage requires WiFi Access Points". Below the table is a section titled "Configuration Attributes" with a "New Configuration Attribute" button highlighted by a red box. To the right of the button is a link for "Configuration Attributes Help". Below this section, it says "No records to display".

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

The screenshot shows the Force.com Quick Access Menu. The menu is open, showing options like "View Fields", "View Object", "View Validation Rules", "View Approvals", "Edit App", "Edit Layout", and "Import Data". The "View Fields" option is highlighted with a red box. The menu is titled "force.com" and has a "Turn off menu" button at the bottom. On the left side of the screen, there are settings for "Row Order", "Column Order", "Position", and "Feature".

- Click the Target Field link

The screenshot shows the details of a configuration attribute. It includes a table with columns for "Edit", "Row Order", "Column Order", "Position", "Feature", and "Apply Immediately". The table has three rows: "SBQQ__DisplayOrder__c", "SBQQ__ShownValues__c", and "SBQQ__TargetField__c". The "SBQQ__TargetField__c" row is highlighted with a red box. Below the table is a section titled "Related Lookup Filters" with the text "No related lookup filters defined."

9. 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	Unit Price	Unit Price	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	
Edit Del Deactivate	Discount (Amt)	Discount (Amt)	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	
Edit Del Deactivate	Discount (%)	Discount (%)	<input type="checkbox"/>	Assigned dynamically	Admin User, 7/18/2017 8:26 AM	

10. Enter API name of new Product Option Fields, then Save

Location__c

11. Return to the original Configuration Attribute tab and refresh the page

12. Set field values, then Save

Information

Attribute Name Location (ITPROPACK)

Product IT Professional Pack

Target Field Location__c

Required ☒

Auto-Select ☐

Row Order 10

Column Order 1

Position Top

Feature

Apply Immediately ☒

Apply To Product Options ☐

= Required Information

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

14. Click New in Custom Fields & Relationships

Standard Fields							Standard Fields Help ?
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History	
Created By		CreatedBy	Lookup(User)			<input type="checkbox"/>	
Last Modified By		LastModifiedBy	Lookup(User)			<input type="checkbox"/>	
Line Name		Name	Auto Number		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Custom Fields & Relationships								Custom Fields & Relationships Help ?
<div>New Field Dependencies Set History Tracking</div>								
Action	Field Label	API Name	Installed Package	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit	Additional Disc.	SBQQ__AdditionalDiscount__c	SteelBrick CPQ	Formula (Currency)			Brian Cloutier, 1/15/2016 8:35 AM	<input type="checkbox"/>

15. 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

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label Location ⓘ

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line

United States
United Kingdom

17. 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

EX11: US Items Product Rule

Objective: Simplify the ITPROPACK configuration process by removing the UK Keyboard and A4-sized paper options should the sales rep choose United States for the Location configuration attribute.

1. Navigate to Product Rule tab
2. Click New

The screenshot shows the 'Product Rules Home' page. At the top, there's a 'View:' dropdown set to 'All' and a 'Go!' button. Below this is a 'Recent Product Rules' section. A red box highlights the 'New' button in the top right corner of this section. Below the button, there are two links: 'Toner quantity must be greater than or equal to printer quantity' and 'Setting LJ-PRINTER auto-selects LJ-TONER and LJ-MAINTKIT'. A 'Recently Viewed' dropdown is also visible.

3. Set field values, then Save

The screenshot shows the 'Information' section of the Product Rule configuration form. A red box highlights the 'Product Rule Name' field with the value 'Only show US related products when Location is United States'. Another red box highlights the 'Conditions Met' dropdown set to 'All'. A third red box highlights the 'Scope' dropdown set to 'Product' and the 'Evaluation Event' dropdown set to 'Always'. On the right, a red box highlights the 'Type' dropdown set to 'Selection' and the 'Active' checkbox which is checked. There are also fields for 'Message' and 'Evaluation Order'.

4. Click New Configuration Rule in Configuration Rules

The screenshot shows the 'Configuration Rules' section of the interface. It has a header 'Configuration Rules' and a 'New Configuration Rule' button highlighted with a red box. Below the header, there are four sections: 'Actions', 'Error Conditions', 'Lookup Queries (Product Rule)', and 'Configuration Rules'. Each section has a 'No records to display' message and a 'New' button. The 'Configuration Rules' section also has a 'Configuration Rules Help' link.

5. Set field values, then Save

Information ! = Required Information

Active ☒

Product IT Professional Pack

Product Rule Only show US related pr...

Product Feature

6. Navigate back to the Product Rule

Product Rule Only show US related products if Location is United States

Product Feature

Created By Brian Cloutier, 1/15/2016 1:06 PM Last Modified By Brian Cloutier, 1/15/2016 1:06 PM

7. Click New Error Condition in Error Conditions

Actions New Product Action Actions Help ?

No records to display

Error Conditions New Error Condition Error Conditions Help ?

No records to display

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

No records to display

Configuration Rules New Configuration Rule Configuration Rules Help ?

Action	Rule #	Active	Product	Product Feature
Edit Del	CR-000002	✓	IT Professional Pack	

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

force.com ?

[View Fields](#)

[View Object](#)

[View Validation Rules](#)

[View Approvals](#)

[Edit App](#)

[Edit Layout](#)

[Import Data](#)

Turn off menu

9. Click the Tested Field link

Edit	Rule	SBQQ__Rule__c	SteelBrick CPQ	Master-Detail(Product Rule)	✓	Brian Cloutier, 1/15/2016 8:35 AM
Edit Replace	Tested Field	SBQQ__TestedField__c	SteelBrick CPQ	Picklist	Tested Object	Brian Cloutier, 1/15/2016 8:35 AM
Edit Replace	Tested Object	SBQQ__TestedObject__c	SteelBrick CPQ	Picklist		Brian Cloutier, 1/15/2016 8:35 AM
Edit	Tested Variable	SBQQ__TestedVariable__c	SteelBrick CPQ	Lookup(Summary Variable)	✓	Brian Cloutier, 1/15/2016 8:35 AM

10. Click New in Values

Values					
<div>New Reorder Replace Printable View Chart Colors</div>					
<div>Values Help ?</div>					
Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Group Line Items	Group Line Items	<input type="checkbox"/>	Assigned dynamically	Admin User , 7/18/2017 8:26 AM
Edit Del Deactivate	Unit Price	Unit Price	<input type="checkbox"/>	Assigned dynamically	Admin User , 7/18/2017 8:26 AM
Edit Del Deactivate	SBQQ__ProductCode__c	SBQQ__ProductCode__c	<input type="checkbox"/>	Assigned dynamically	Admin User , 7/18/2017 12:22 PM

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

Save

Location__c

12. Click the Change link next to Tested Object

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

13. Double-click the Location API name Location__c under the Configurable Attributes column, then Save

Click button to include or exclude selected values from the dependent picklist:					
<div>Include Values Exclude Values</div>					
Showing Columns: 1 - 5 (of 6) < Previous Next > View All Go to					
Tested Object:	Quote	Quote Line	Quote Line Group	Product Option	Configuration Attributes
Tested Field:	Group Line Items	Group Line Items	Group Line Items	Group Line Items	Group Line Items
	Unit Price	Unit Price	Unit Price	Unit Price	Unit Price
	SBQQ__ProductCode__c	SBQQ__ProductCode__c	SBQQ__ProductCode__c	SBQQ__ProductCode__c	SBQQ__ProductCode__c
	Location__c	Location__c	Location__c	Location__c	Location__c
Showing Columns: 1 - 5 (of 6) < Previous Next > View All					

14. Click OK if a warning popup appears

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

16. Set field values, then Save

Information ! = Required Information

Rule Only show US related pr

Tested Object Configuration Attributes

Tested Field Location__c

Tested Attribute

Tested Variable

Filter Information

Operator equals

Filter Type Value

Filter Value United States

Filter Variable

17. Navigate back to the Product Rule

18. Click New Product Action in Actions

Actions Actions Help ?

New Product Action

No records to display

Error Conditions Error Conditions Help ?

New Error Condition

Action	Condition #	Tested Variable	Operator	Filter Type	Filter Variable	Filter Value
Edit Del	000002		equals	Value		United States

19. Set field values, then click Save & New

Information ! = Required Information

Rule Only show US related pr

Type Show

Product Apple US Keyboard

Required

20. Set field values, then click Save & New

Information ! = Required Information

Rule Only show US related pr

Type Hide & Remove

Product Apple UK Keyboard

Required

21. Set field values, then click Save & New

Information ! = Required Information

Rule Only show US related pr

Type Show

Product LaserJet Paper Letter

Required

22. Set field values, then Save

Information

= Required Information

Rule

Only show US related pr

Type

Hide & Remove

Product

LaserJet Paper A4

Required