Salesforce CPQ

Salesforce, Winter ’19

@salesforcedocs
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MANAGE YOUR QUOTES WITH CPQ

Use Salesforce CPQ to create, manage, and send your quotes.

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Create a quote for your customers. After you add products to your quote, you can adjust their quantities, configuration, and pricing.

Send Your CPQ Quotes
After you finalize your quote, create a document for it, and then send the document to your customers. Salesforce CPQ lets you customize the document creation and management process.

Advanced Approvals
Automate and customize your approval process with the Advanced Approvals package for Salesforce CPQ. You can require approvals when records meet certain conditions, automate resubmitted approvals, and control the order that approvers receive requests.

Manage Your CPQ Orders
When your customer is ready to order their CPQ quote, create an order record to track the products they've purchased. Orders contain order products for each of your quote lines. You can contract the order record to track its subscription products. You can also create invoices from your order.

Manage Your Subscriptions and Assets
Use subscriptions to keep records of subscription products you've quoted or sold. Use assets to keep records of stand-alone products you've quoted or sold. You can use these records later to manage amendments and renewals to your quotes and orders.

Amend Your Contracts and Assets
Add products or edit product quantities on your contracts. If you're using an asset-based renewal model, you can change the assets on your quotes and orders.

Renew Your Contracts and Assets
Renew a contract when your subscriptions are about to reach their end date. If you're using an asset-based renewal model, you can renew a percent of total product and its covered assets.

Getting Started with Salesforce CPQ

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Salesforce CPQ Installation

Manage the setup and installation of Salesforce CPQ.

EDITIONS

Available in: All Salesforce CPQ Editions

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Set Up Salesforce CPQ in Salesforce Professional Edition

Because Salesforce Professional Edition does not have profiles, field-level security, or page layouts, installing Salesforce CPQ in a Professional Edition instance requires extra steps. If you're a Salesforce CPQ admin for a Professional Edition instance, make sure that your org contains the right fields and page layouts.

Salesforce CPQ Profile Permissions

Depending on your settings and your company's internal processes, you may need to customize profile permissions for your users.

Salesforce CPQ Installation Permissions

EDITIONS

Available in: All Salesforce CPQ Editions

Before installing Salesforce CPQ, enable important permissions in your Salesforce org.

1. Enable email deliverability to all users.
2. Enable Chatter.
3. Enable Orders.
4. Enable CRM content.

If you want to use the Salesforce CPQ Advanced Calculator, authorize it in our installed packages configuration page.

Install Salesforce CPQ

EDITIONS

Available in: All Salesforce CPQ Editions

Install Salesforce CPQ from your package installation link.

Note: Installing into a Sandbox org is unavailable from the AppExchange links.

1. From your installation link, click **Continue**.
   Salesforce CPQ then prompts you to approve third-party access.
2. Select "Yes, grant access to these third-party websites."
3. Review the package components and then click **Continue**.
4. Review component API access and then click **Continue**.
5. Choose the security level to grant users upon installation.

   We recommend granting access to all users. Choosing other options can lead to extensive time spent adjusting permissions later.
6. Click **Next**, then click **Install**.

   Salesforce sends you an email once your installation has completed.
7. If you're Salesforce CPQ for the first time, authorize the Salesforce CPQ calculator.
   a. From Setup, enter `Installed Packages`, and then click **Installed Packages**.
   b. Find Salesforce CPQ and click **Configure**.
   c. Click the Pricing and Calculation tab.
   d. Click **Authorize New Calculation Service**.

If your post-install scripts initially fail, you can rerun them after installing the CPQ package. Post-install scripts are not harmful to your org.

Set Up Salesforce CPQ in Salesforce Professional Edition

EDITIONS

Available in: All Salesforce CPQ Editions

Because Salesforce Professional Edition does not have profiles, field-level security, or page layouts, installing Salesforce CPQ in a Professional Edition instance requires extra steps. If you're a Salesforce CPQ admin for a Professional Edition instance, make sure that your org contains the right fields and page layouts.

API access must be enabled for Salesforce CPQ Summer '17 and later to work in a Professional Edition org. API enablement in a Professional Edition org is an added cost. For details, contact your Salesforce Account Executive.

1. Add the fields that you want users to see on the page layouts for your objects. If a field is not on the page layout, it is hidden from users everywhere in Salesforce and Salesforce CPQ. This includes reports, list views, and search results.
2. Add the following fields to the Quote line object page layout.
    - Product Code
    - Product Name
    - Product Family
3. Add the Document ID field to the Quote Document page layout so that users can view generated quote documents.
4. If your company uses bundle products, add the following fields to the product option page layout.
    - Product Name
    - Product Code
    - Description
    - Product Configuration Type
    - Price Editable
5. If your company plans to use block pricing, cost-markup pricing, or special features, add the relevant price fields to page layouts so that your sales reps can use them.

Salesforce CPQ Profile Permissions

EDITIONS

Available in: All Salesforce CPQ Editions

Depending on your settings and your company's internal processes, you may need to customize profile permissions for your users.

User Type	Read	Create	Edit	Delete	Notes
Users creating Quotes	• Quote • Quote Document • Quote Lines • Quote Line Groups • Quote Templates	• Quote • Quote Document • Quote Lines • Quote Line Groups	• Quote • Quote Document • Quote Lines • Quote Line Groups	• Quote • Quote Document • Quote Lines • Quote Line Groups	None

User Type	Read	Create	Edit	Delete	Notes
	• Template Sections • Template Content				
Quote Templates (Admin)	• Quote Templates • Template Content • Template Sections	None	None	None	None
Sales Reps	• Read permissions on all Salesforce CPQ objects	None	None	None	None
Using product bundles where sales reps select component offerings after adding a bundle to a quote	• Products	• Products	• Products	• Products	To prevent reps from creating a product, set "Read-Only" permissions for their Products tab.*"Hide" cannot stop users from using the URL to access the Product page to create a new Product.*
Product Bundles (Admin)	• Products • Product Options • Product Features • Option Constraints	• Products • Product Options • Product Features • Option Constraints	• Products • Product Options • Product Features • Option Constraints	• Products • Product Options • Product Features • Option Constraints	None
Sales Reps with the ability to group line items	• Quote Line Groups	• Quote Line Groups	• Quote Line Groups	• Quote Line Groups	None
Block Prices (Admin)	• Block Prices	• Block Prices	• Block Prices	• Block Prices	None
Block Prices (Sales Rep)	• Block Prices	None	None	None	None
Cost Markup Pricing on Products (Admin)	• Costs	• Costs	• Costs	• Costs	None

User Type	Read	Create	Edit	Delete	Notes
Cost Markup Pricing on Products (Sales Rep)	• Costs	None	None	None	None
Discount Schedules (Admin)	• Discount Schedules • Discount Tiers	• Discount Schedules • Discount Tiers	• Discount Schedules • Discount Tiers	• Discount Schedules • Discount Tiers	None
Edit predefined discount schedules (Sales Rep)	• Discount Schedules • Discount Tiers	None	None	None	None
Create and customize discount schedules (Sales Rep and Admin)	• Discount Schedules • Discount Tiers	• Discount Schedules • Discount Tiers	• Discount Schedules • Discount Tiers	• Discount Schedules • Discount Tiers	None
Contracted Prices (Admin)	• Contracted Prices	• Contracted Prices	• Contracted Prices	• Contracted Prices	None
Contracted Prices (Sales Rep)	• Contracted Prices	None	None	None	None
Price Rules (Admin)	• Price Actions • Price Conditions • Price Rules	• Price Actions • Price Conditions • Price Rules	• Price Actions • Price Conditions • Price Rules	• Price Actions • Price Conditions • Price Rules	None
Price Rules (Sales Rep)	• Price Actions • Price Conditions • Price Rules	None	None	None	None
Guided Selling (Admin)	• Process Inputs • Quote Processes	• Process Inputs • Quote Processes	• Process Inputs • Quote Processes	• Process Inputs • Quote Processes	None
Guided Selling (Sales Rep)	• Process Inputs • Quote Processes	None	None	None	None
Product Rules (Admin)	• Product Actions • Product Rules	• Product Actions • Product Rules	• Product Actions • Product Rules	• Product Actions • Product Rules	None
Product Rules (Sales Rep)	• Product Actions • Product Rules	None	None	None	None

User Type	Read	Create	Edit	Delete	Notes
Dynamic Quote Terms (Admin)	• Quote Terms	• Quote Terms • Term Conditions	• Quote Terms • Term Conditions	• Quote Terms • Term Conditions	None
Dynamic Quote Terms (Sales Rep)	• Quote Terms	None	None	None	None
Dynamic Proposals to include PDF docs in Quotes (Admin)	• Additional Documents	• Additional Documents	• Additional Documents	• Additional Documents	None
Dynamic Proposals to include PDF docs in Quotes (Sales Rep)	• Additional Documents	None	None	None	None
Solution Groups (Admin)	• Solution Groups	• Solution Groups	• Solution Groups	• Solution Groups	None
Solution Groups (Sales Rep)	• Solution Groups	None	None	None	None
Renewals on Opportunities and Quotes (Sales Reps)	• Subscribed Assets • Subscriptions • Assets • Contracts	None	None	None	None
Triggering asynchronous calculation	• Record Jobs (object) • RecordJobService Apex class	• Record Jobs (object) • RecordJobService Apex class	• Record Jobs (object) • RecordJobService Apex class	• Record Jobs (object) • RecordJobService Apex class	None

Guidelines for Setting Up Salesforce CPQ

Once you've installed your CPQ package, review some common objects and features.

EDITIONS

Available in: All Salesforce CPQ Editions

Approval Process

Your company may already have an org chart that defines the flow of each stage in your approval process. Make sure that you diagram this flow so that everyone agrees on how a quote moves from one approval level to another and which quote attributes drive each decision tree.

Company Logo

Find a company logo that you want to show in your quote document and add it to a folder in your Documents tab in Salesforce. You can reference these logos by their Document ID in your quote templates.

Discount Schedules

You can create volume discounts based on quantity or terms for your products. When you add those products to your quote, Salesforce CPQ applies a proportional discount to the net total for that quote line. For example, you could apply a 10% discount to one through nine products, and a 15% discount to ten through nineteen products.

Multi-Lingual Considerations

Determine the best plan for your non-English speaking users. You can install Salesforce CPQ in a multi-lingual instance, but the components are available only in English.

Package Settings

Salesforce CPQ package settings let you apply settings across your entire package. Here's a list of some commonly used package settings that you may want to modify.

- Allowing partner discounts on quote lines
- Adjusting the number of decimal places in your unit prices.
- Adding storage folders for your quote documents
- Grouping quote line editor search results by shared fields
- Using solution groups to store commonly quoted sets of products in the quote line editor

Basic Page Layout Setup

Add the Quotes related list to your opportunity page layout and the opportunity page layout of any user who will be creating quotes.

Add the Primary Quote field to opportunity page layouts. This field automatically looks up to the primary quote for an opportunity. If the primary quote changes, Salesforce CPQ updates this field accordingly.

Add the Quote Documents related list to the opportunity page layouts of any user who will send or track quotes.

Products and Price List

Salesforce CPQ uses Salesforce price books. If you're not already using products and price books in Salesforce, we recommend creating a spreadsheet of your products and their prices. You can then import it into Salesforce.

If your products include optional features and add-on components, you can configure these products as bundles in Salesforce CPQ. Bundles include the following objects.

- Options: Products within the bundle that contribute to the bundle price. For example, you could sell a desktop setup bundle with one option for each component of your bundle: CPU, RAM, motherboard, monitors, and power supplies.
- Features: Features are categories of options. Use these to group options of a similar type together. For example, if your desktop setup bundle contains five types of motherboards, you could create a motherboard feature.
- Option Constraints: Option constraints control which of a feature's options may or may not be purchased together. For example, you could require sales reps to select three out of five possible options within a feature.

Quote Templates

Salesforce CPQ quote templates provide layouts for the quote documents that your sales reps send to customers. You can customize standard quote details such as your logo, company name, and terms and conditions. You can set a default template for your entire company and also store other templates for non-standard quote types.

Quote Status

Your company may have custom values in place for tracking a quote through its lifecycle. To align Salesforce CPQ with your quoting process, we recommend updating the quote's Status field with your company's custom status values. By default, CPQ quotes have the following statuses.

- Draft
- In Review
- Approved
- Denied
- Presented
- Accepted
- Rejected

We recommend using the first four values internally, while you can present the last three to clients on a quote document.

Sandbox

We recommend getting a full Salesforce sandbox org so you can test all your CPQ features without affecting your production data. You can also use it to provide training demonstrations and user acceptance testing in a safe environment.

Twin Fields

Salesforce CPQ shares values between fields of the same type on certain objects when the API names of those fields match.

EDITIONS

Available in: All Salesforce CPQ Editions

One-Way Mapping

Objects in Column 1 of this table pass field values to fields with matching types and API names from the objects in column 2.

Column 1	Column 2
Contract	Opportunity
Contract	Renewal Opportunity
Service Contract	Opportunity
Service Contract	Renewal Opportunity
Opportunity Products	Quote Line Twin mapping here applies only to stand-alone products and only when opportunity products have been created before a sales rep creates the opportunity's first primary quote.
Product	Quote Line
Quote	Order
Quote Line	Order Product
Quote Line	Opportunity Product
Quote Line	Subscription
Quote Line	Assets
Quote Line	Contract Line Item
Subscriptions	Quote Line
Contract Line Item	Quote Line
Order Product	Invoice Line

Two-Way Mapping

Objects in Column 1 and Column 2 of this table pass values to each other for fields with matching types and API names.

Column 1	Column 2
Configuration Attributes	Quote Line
Editable custom fields on product options	Quote Line

Note:

- Selecting the Configuration Attribute checkbox on an attribute record maps that attribute's value to quote lines that are product options of the same bundle.
- A pair of lookup fields must both reference the same object to map their values.

CPQ Favorites

The CPQ favorites object lets sales reps save and share their favorite products, configured bundles, or quote line groups for use on future quotes. Salesforce CPQ admins can also manage favorites by creating, sharing, editing, and deleting the favorite records.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

Note: We don't recommend allowing sales reps to directly modify the favorites object.

Save a CPQ Favorite
Save one of your quote lines as a favorite.

Add a CPQ Favorite to a Quote
If you've saved a quote line as a favorite, add it to your quote in the quote line editor.

Delete a CPQ Favorite
Delete the favorite record for a quote line that you've saved as a favorite.

Edit a CPQ Favorite
Edit the name and description of a CPQ favorite record.

Share a CPQ Favorite
Share a CPQ favorite record with users and user groups.

Save a CPQ Favorite

Save one of your quote lines as a favorite.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

1. In the quote line editor, click the star icon for the quote line that you want to save as a favorite.
2. Enter a name for the record.
3. Click **Save**.
   Salesforce CPQ shows a shaded star icon for the quote line to confirm that a user saved it as a favorite.

Note: Salesforce CPQ loads all favorite bundles into the quote line editor with a parent quantity of 1, even if the favorite record showed a different parent quantity.

Add a CPQ Favorite to a Quote

If you've saved a quote line as a favorite, add it to your quote in the quote line editor.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

1. From the quote line editor, click the dropdown arrow on the Add Products button, then click **Add Favorites**. You can also click the star icon on the Product Selection page.
2. Select the favorites that you want to add. You can add up to 10 favorites per each instance of the Favorite Lookup page.
3. Click **Select** to return to the quote line editor. You can also click **Select & Add More** to add more favorites.

Delete a CPQ Favorite

Delete the favorite record for a quote line that you've saved as a favorite.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

1. From the quote line editor, click the dropdown arrow on the Add Products button, then click **Add Favorites**.
2. From the Favorites Lookup page, select the records you want to delete.
3. Click **Delete**.
4. Click **Cancel** to return to the quote line editor.
5. You can also click the shaded star icon next to a quote line to delete the related favorite record.

Edit a CPQ Favorite

Edit the name and description of a CPQ favorite record.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

1. Navigate to your org's favorites page and click the favorite record that you want to edit.
2. On the favorite record's detail page, click **Edit**.
3. Change the favorite record's name or description.
4. Click **Save**.

Share a CPQ Favorite

Share a CPQ favorite record with users and user groups.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

1. From the quote line editor, click the dropdown arrow next to Add Products, and then click **Add Favorites**. You can also click the star icon in the Product Selection page.
2. From the Favorite Lookup page, select the favorites that you want to share.
3. Click **Share**.
4. In the Share Favorites modal window, type the name of the user or public group that you want to share with.

   Salesforce CPQ shows the top eight results that match your text.
5. Click a user or group to add it to the list of people you're sharing with. You can then select more users or groups if needed.
6. Click **Share**.

Importing Quote Lines from CSV Files

Sales reps can upload line items to the Salesforce CPQ line editor by importing a CSV file. Salesforce CPQ uses the import format object to define a template for converting data from the CSV file.

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

Define Import Formats

Create an import format record that provides the configuration for the importing process.

Import Line Items from a CSV File

Import a CSV file of product data so that Salesforce CPQ can convert it to quote line items on your quote. This feature is useful if you need to quickly convert data from an external source into line items within Salesforce CPQ.

Define Import Formats

Create an import format record that provides the configuration for the importing process.

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

USER PERMISSIONS

To create import formats

- The import format object must be set to Default On for administrators

1. Add the Import Lines button to the quote page layout.
2. Add the Import Column related list to the import format page layout.
3. Create your import format.
   a. From the Import Formats object, click **New**.
   b. Enter a name for your import format.
   c. Select the Active field.
   d. Click **Save**.
4. Add import columns to your import format.
   a. From your import format, click **New Import Column**.
   b. Enter a name for your import column.

      The column header row on the CSV file you're importing must match the column name on the equivalent import column. Create user-friendly names so your sales reps can save time during the import process.
   c. Enter a column index number. This number determines the order of this import column relative to the import format's other columns.
   d. Choose a value for the field name picklist.

      The Field Name field can contain the API name of any field on the line editor. For ease of reference, we recommend that your column name and field name have the same value.
   e. If this column contains your import format's unique key value, select the Key field.
      - Your key import column can't be related to formula fields, rules-driven fields, discount fields, quantity, or price.
      - If your import format contains several columns with a selected Key field, Salesforce CPQ uses the last key column that you made.

Import Line Items from a CSV File

Import a CSV file of product data so that Salesforce CPQ can convert it to quote line items on your quote. This feature is useful if you need to quickly convert data from an external source into line items within Salesforce CPQ.

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

Important: You can upload only standalone products, not product bundles.

1. From your quote's detail page, click **Import Lines**.
2. Choose your CSV file format.

   Salesforce CPQ shows a list of fields in Required CSV Column Headers. Make sure your CSV file contains column headers with matching names.
3. If you've enabled your quote for grouping, choose an available group from the Quote Line Group. If your quote doesn't have a group yet, you can create one by selecting **Create New**.

   You can define only one group per CSV upload.
4. Click **Browse Import File** and choose your CSV file.

   Remember, your CSV file column names should correspond to the column names in your import format record.
5. Click **Import**.
   Salesforce CPQ shows error messages for any lines that failed to import or for any products that it couldn't find in the database. Click **Cancel** to close out the error messages and finish importing your products. Salesforce CPQ then returns you to the quote line editor.

Apply Visual Themes to the Quote Line Editor

Customize your quote line editor with our theming options.

EDITIONS

Available in: Salesforce CPQ Summer '17 and later

1. On your Themes object home page, click **New**.
2. Give your theme a name, and then save your changes.
3. From your theme record, click **Edit**.
4. Edit your theme settings.

   When you use the color picker, make sure that you click **Choose** after selecting your color. If you don't, Salesforce CPQ doesn't apply the new color to your theme.
5. Do one of the following.
   - To cancel your edits and return to the Themes page, click **Cancel**.
   - To return your settings to their state before you began editing this record, click **Revert**.
   - To show your edits in a sample page, click **Preview**. When you're done previewing your edits, click back in your browser to return to the Salesforce CPQ Theme page.
   - To apply these settings, click **Publish**.

Override Default CPQ Custom Labels

Salesforce CPQ stores most of its labels and messages as custom label records. Override a custom label's default text with new text of your choosing.

EDITIONS

Available in: All Salesforce CPQ Editions

1. From Setup, in the quick find box, enter `Custom Labels`, and then click **Custom Labels**.
2. Find the row for the label or message you want to change and click its Name value.

You can search quickly by sorting the Value column or using the alphabet filter, then reviewing the results page until you find your desired label.

3. Click **New Local Translations / Overrides**.
4. Change the language to your org's default language.
5. Enter your new text in the Translation Text field. This text overrides the current master label text for your org's default language.
6. Click **Save**.

If your custom label has any packaged translations for non-default languages, Salesforce CPQ still uses them in translated orgs instead of the local translation you just made. To override a packaged translation, click **Override** for that language's value and change its translation text.

Adding a Parameter to Lookup Field Searches

EDITIONS

Available in: Salesforce CPQ Summer '17 and later

You can add an extra search parameter to lookup field searches in Salesforce CPQ Visualforce pages. The extra parameter helps you find the value you're looking for if you're having trouble remembering its name.

The lookup field modal searches by your record's Name field by default. You can add one more text field as a search parameter if you want to perform a more detailed search.

To add an extra parameter, create a new field set on the object that you want to search. Next, fill the field set with the extra field you want to search against. Label your field set differently based on Salesforce CPQ version.

Before Salesforce CPQ Summer '17

Label: CPQ_Lookup_Search

Name: Enter a name of your choosing.

After Salesforce CPQ Summer '17

Either the label or the name can be CPQ_Lookup_Search. You can set the other field to a value of your choosing.

As long as this field set exists, lookup field searches in CPQ Visualforce pages perform a logical OR search against the included field after searching against the object's Name field. For example, if you add the Industry field to CPQ_Lookup_Search, Salesforce CPQ first checks your search input against the target record's Name field. If there are no matches, Salesforce CPQ then checks your search input against the target record's Industry field.

Salesforce CPQ searches against the more field and displays results even if that field isn't in your object's Search Results layout. You can add or remove your new search field from the search results as needed.

If CPQ_Lookup_Search contains multiple fields, Salesforce CPQ searches only against the top-positioned field in the set. To add more search fields or search a non-text field, contact Salesforce CPQ Support.

Translating Salesforce CPQ Records

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

You can specify which parts of key CPQ objects are translated. When you translate a record, you define the text fields' translated values only for that record. That way you can have different translations for unique records across the same object. Salesforce CPQ stores the translated values in a localization record.

You can provide translated values for most of the Salesforce CPQ UI with the translation workbench or by defining custom labels.

- Use the translation workbench for all custom field names, picklist values, and help messages.
- Define custom labels for button names and error messages.

- Rename tabs and labels.

For all text fields on the following CPQ objects, use the Salesforce CPQ translation process to define a translated value.

- Line Column
- Price Dimension
- Product
- Product Feature
- Product Option
- Quote Template
- Quote Term

Associate a language with a translated value for text fields on your record. You can define translations in any language that Salesforce supports. When a user of that language views the fields in the following locations, the translated values are shown.

- Quote Line Editor
- Order Product Selection page
- PDF documents, if the user generated the document in the same language as an existing translation

Localize a CPQ Record

Define translations for text fields on certain types of CPQ objects.

Salesforce CPQ Localization Fields

When a user translates a record, Salesforce CPQ creates a localization record for each text field that you translated. Depending on your page layout and field-level security settings, some fields might not be visible.

CPQ For Lightning Communities

Salesforce CPQ and the Salesforce Partner Community provide an online selling platform that connects your resellers and distributors to your own sales processes and resources. This way, your channel partners can service their buyers directly. The CPQ for Self-Service platform lets CPQ clients to extend complete CPQ functionality to a customer community, allowing their own customers to self-service when they need to work on contracts or quotes.

Localize a CPQ Record

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

Define translations for text fields on certain types of CPQ objects.

You can define translated values for custom text, text area, long text area, and rich text area fields on the following Salesforce CPQ objects.

- Line Column
- Price Dimension
- Product
- Product Feature
- Product Option
- Quote Template
- Quote Term

1. On the page layout of the record you want to translate, add the Translate button.
2. On your record's detail page, click **Translate**.
3. Select the translation language.

4. Define translated values for each field that you want to translate.
5. Click **Save**.
   Salesforce CPQ creates a localization record for each field that you translated on the record. For example, if you defined translations for five fields on your IT Security Package product, Salesforce CPQ creates five localization records. Each record looks up to your IT Security Package product record.

Salesforce CPQ Localization Fields

When a user translates a record, Salesforce CPQ creates a localization record for each text field that you translated. Depending on your page layout and field-level security settings, some fields might not be visible.

Localization records store information for only 1 text field at a time.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

Localization Fields

Language

The language code that Salesforce CPQ uses for this translation. When users view a field that you've localized into this language, they see the value that you provided within one of the record's text fields.

Salesforce CPQ supports translation into all languages that Salesforce core supports. When you provide a value for this field, use one of the following language codes.

- Chinese (Simplified): zh_CN
- Chinese (Traditional): zh_TW
- Danish: da
- Dutch: nl_NL
- English: en_US
- Finnish: fi
- French: fr
- German: de
- Italian: it
- Japanese: ja
- Korean: ko
- Norwegian: no
- Portuguese (Brazil): pt_BR
- Russian: ru
- Spanish: es
- Spanish (Mexico): es_MX
- Swedish: sv
- Thai: th

API Name

The API name of the field with the translated label

Label

The original translated label

Text
The user-defined translation for the label of a text field

Text Area
The user-defined translation for the label of a text area field

Long Text Area
The user-defined translation for the label of a long text area field

Rich Text Area
The user-defined translation for the label of a rich text area field

CPQ For Lightning Communities

EDITIONS

Available in: Salesforce CPQ Summer '17 and later

Salesforce CPQ and the Salesforce Partner Community provide an online selling platform that connects your resellers and distributors to your own sales processes and resources. This way, your channel partners can service their buyers directly. The CPQ for Self-Service platform lets CPQ clients to extend complete CPQ functionality to a customer community, allowing their own customers to self-service when they need to work on contracts or quotes.

You can configure Salesforce CPQ to enable your partners and customers to self-serve in a partner or customer community. All the business logic embedded into your CPQ application extends to the Community as well. This means all configuration logic, pricing scenarios, volume or term discount schedules, contracted pricing and more are available to your partners and customers.

We recommend planning and reviewing any fields and actions you wish to hide from your customers. For example, you wouldn't want a community to give themselves an additional discount. Customers may not need access to quote line editor actions that sales reps use. For example, you may only want your customers to use the add products, calculate, cancel, and save buttons.

In amendment and add-on scenarios, you may want to prevent customers from creating business quotes. Users can accomplish this by selecting Skip on the Select a Contract page.

Create a Lightning Community and Enable CPQ
Create a lightning community and enable Salesforce CPQ within it.

Allow Customer Community Users to Buy Net-New Products
Enable customers to purchase net new products and place new orders within a customer community.

Triggers for Automatic Opportunity Generation
Quotes don't automatically create opportunities after creation. To enable automatic opportunity generation, create a trigger that creates an opportunity after Salesforce CPQ saves a customer community quote.

Assign a Theme to New Customer Communities
Create a workflow rule that automatically assigns a theme to a new customer community.

Create a Lightning Community and Enable CPQ

EDITIONS

Available in: Salesforce CPQ Summer '17 and later

Create a lightning community and enable Salesforce CPQ within it.

1. Create a Lightning Community.
   a. From Setup, in the quick find box, enter `Communities` and then click **All Communities**
   b. Click **New Community**.

   c. Choose the Customer Service (Napili) template and follow the prompts, which take you to the community builder.

      You can choose from any available template, or a Lightning Bolt that a Salesforce Partner created.

2. Enable Salesforce CPQ in your Lightning Community.
   a. Select the navigation menu.
   b. Add the Quote object to the navigation menu.
   c. From the Save menu, click **Publish**.
      The quotes tab shows a list of your org's quotes.

Allow Customer Community Users to Buy Net-New Products

EDITIONS

Available in: Salesforce CPQ Summer '17 and later

Enable customers to purchase net new products and place new orders within a customer community.

1. Create a global action for the New Quote button.
   a. From Setup, in the Quick Find box, enter `Global Actions`, and then click **Global Actions**.
   b. Click **New Action**.
   c. Enter the following field values, then click **Save**.
      - Action Type: Create a Record
      - Target Object: Quotes
      - Label: New Quote
      - Name: New Quote
   d. Add fields that you want your user to complete before they add new products, then click **Save**.
2. In the Community Builder, select Components, select Records, then select Create a Record and drag it where you want it to appear for users. For example, you could place it below the Welcome message.
3. Select the Create a Record widget and enter the following information.
   - Button Label (Enter a label of your choosing. For example, you could use "Make a Quote."
   - In the Global Actions section, select the global action you made in Step 1.
4. Click **Save**.
   Your users can now enter a New Business flow from your community's home page.

Triggers for Automatic Opportunity Generation

EDITIONS

Available in: Salesforce CPQ Summer '17 and later

Quotes don't automatically create opportunities after creation. To enable automatic opportunity generation, create a trigger that creates an opportunity after Salesforce CPQ saves a customer community quote.

Here's an example of a trigger you can use to create an opportunity in response to the saving of a customer quote.

Example:

```
trigger AfterUpdateCreateOppty on SBQQ__Quote__c (after update)
 {
```

```
   for(SBQQ__Quote__c q : trigger.new){
       if(q.SBQQ__Status__c == 'Approved' && trigger.oldMap.get(q.Id).SBQQ__Status__c
 != 'Approved'){
           Id accountId = [SELECT SBQQ__Account__c FROM SBQQ__Quote__c WHERE
ID=:q.Id].get(0).AccountId;
           Opportunity o = new Opportunity(Name=q.Name+' '+'Opportunity', AccountId=
accountID, CloseDate=date.today(), StageName='Qualification',
SBQQ__QuotePricebookId__c=q.SBQQ__PricebookId__c);
           System.debug('My Name' + o);
           Database.Insert(o);
           q = [ select id from SBQQ__Quote__c where id = :q.id limit 1];
           q.SBQQ__Opportunity2__c = o.Id;
           q.SBQQ__Primary__c = True;
           q.SBQQ__Account__c = accountID;
           Database.Update(q);

           Opportunity o2 = [ select id from Opportunity where id =
:q.SBQQ__Opportunity2__c limit 1];
           o2.StageName='Closed Won';
           Database.Update(o2);
       }
   }

}
```

Assign a Theme to New Customer Communities

Create a workflow rule that automatically assigns a theme to a new customer community.

1. Create a theme that you want to use for your customer community.
2. Use a workflow rule to assign the theme to a profile.
   - Object: User
   - Criteria: User Type equals Partner
   - Workflow Action
     - Type: Field Update
     - Name: Set Theme
     - Field to Update: Theme
     - Value: Use a formula to set the new value
     - Formula: Document ID for the theme, enclosed in single quotes

EDITIONS

Available in: Salesforce CPQ Summer '17 and later

CPQ Object Relationships

Review field lookup and master-detail relationships for CPQ objects.

EDITIONS

Available in: All Salesforce CPQ Editions

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
Additional Document	SBQQ__RelatedContent__c	• Opportunity • Quote Template • Product • Quote • Template Section	none
Asset	Asset	• Quote Line • Product • Subscription	none
Block Price	SBQQ__BlockPrice__c	• Price Book • Product	none
Configuration Attribute	SBQQ__ConfigurationAttribute__c	Product Feature	none
Configuration Rule	SBQQ__ConfigurationRule__c	Product Feature	Product Rule
Contract	Contract	• Account • Opportunity • Price Book • Quote • User	none
Contracted Price	SBQQ__ContractedPrice__c	• Contract • Discount Schedule • Product	Account
Cost	SBQQ__Cost__c	Product	none
Custom Action	SBQQ__CustomAction__c	none	none
Custom Action Condition	SBQQ__CustomActionCondition__c	none	Custom Action
Custom Script	SBQQ__CustomScript__c	none	none
Discount Category	SBQQ__DiscountCategory__c	none	none
Discount Schedule	SBQQ__DiscountSchedule__C	• Account • Original Discount Schedule • Price Book • Product • Quote	none

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
		• Quote Line	
Discount Tier	SBQQ__DiscountTier__c	none	Discount Schedule
Error Condition	SBQQ__ErrorCondition__c	• Filter Variable • Summary Variable	Product Rule
Favorite	SBQQ__Favorite__c	none	none
Favorite Product	SBQQ__FavoriteProduct__c	• Product • Product Option • Favorite Product	Favorite
Favorite Share	SBQQ__FavoriteShare__c	User	Favorite
Import Column	SBQQ__ImportColumn__c	none	Import Format
Import Format	SBQQ__ImportFormat__c	none	none
Install Processor Log	SBQQ__InstallProcessorLog__c	none	none
Line Column	SBQQ__LineColumn__c	Template Section	Quote Template
Import Column	SBQQ__ImportColumn__c	none	none
Import Format	SBQQ__ImportFormat__c	none	none
Install Processor Log	SBQQ__InstallProcessorLog__c	none	none
Line Column	SBQQ__LineColumn__c	Template Section	Quote Template
Localization	SBQQ__Localization__c	• Line Column • Price Dimension • Product • Product Feature • Product Option • Quote Template • Quote Term • Template Content	none
Lookup Data	SBQQ__LookupData__c	none	none
Lookup Query	SBQQ__LookupQuery__c	none	Price Rule
Opportunity	Opportunity	Quote Contract	none
Opportunity Product	OpportunityLineItem	• Product • Quote Line	none

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
		• Opportunity • User	
Option Constraint	SBQQ__OptionConstraint__c	• Product • Product Option	Product Option
Price Action	SBQQ__PriceAction__c	Summary Variable	Price Rule
Price Book	PriceBook2	none	none
Price Condition	SBQQ__PriceCondition__c	Summary Variable	Price Rule
Price Dimension	SBQQ__Dimension__c	• Discount Schedule • Price Book • Product	none
Price Rule	SBQQ__PriceRule__c	Option Constraint	none
Process Input	SBQQ__ProcessInput__c	Process Input Condition	Quote Process
Process Input Condition	SBQQ__ProcessInputCondition__c	none	Process Input
Process Input Values	SBQQ__ProcessInputValue__c	• Quote • User	none
Product	Product2	• Discount Category • Discount Schedule • Product	none
Product Action	SBQQ__ProductAction__c	Product	Product Rule
Product Feature	SBQQ__ProductFeature__c	• Product • Discount Schedule	none
Product Option	SBQQ__ProductOption__c	• Product Feature • Discount Schedule • Product	none
Product Rule	SBQQ__ProductRule__c	none	none
Quote	SBQQ__Quote__c	• Quote Template • Contract	Opportunity
Quote Document	SBQQ__QuoteDocument__c	Opportunity	Quote

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
Quote Line	SBQQ__QuoteLine__c	• Asset • Subscription • Discount Tier • Block Price • Cost • Contracted Price • Discount Schedule • Product Option • Product • Quote Line	Quote
Quote Line Group	SBQQ__QuoteLineGroup__c	• Quote Process • Solution Group • Quote Line Group	Quote
Quote Process	SBQQ__QuoteProcess__c	none	none
Quote Template	SBQQ__QuoteTemplate__c	Template Content	none
Quote Term	SBQQ__QuoteTerm__c	• Quote • Quote Term • Template Content	none
Search Filter	SBQQ__SearchFilter__c	Custom Action	none
Solution Group	SBQQ__SolutionGroup__c	none	none
Subscribed Asset	SBQQ__SubscribedAsset__c	Asset	Subscription
Subscription	SBQQ__Subscription__c	• Account • Contract • Price Dimension • Product • Quote Line • Subscription	none
Summary Variable	SBQQ__SummaryVariable__c	Summary Variable	none
Template Content	SBQQ__TemplateContent__c	none	Template Section
Template Section	SBQQ__TemplateSection__c	Template Content	Quote Template
Term Condition	SBQQ__TermCondition__c	Summary Variable	Quote Term

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
Theme	SBQQ__Theme__c	none	none
Timing Log	SBQQ__TimingLog__c	none	none
Upgrade Source	SBQQ__UpgradeSource__c	Product	none
Web Quote	SBQQ__WebQuote__c	• Account • Contact • Contract • Opportunity • Price Book • Quote • Quote Template • User	none
Web Quote Line	SBQQ__WebQuoteLine__c	• Asset • Block Price • Contracted Price • Cost • Discount Schedule • Discount Tier • Subscription • Web Quote Line	Web Quote

CPQ Object and Term Glossary

EDITIONS

Available in: All Salesforce CPQ Editions

When you're working with Salesforce CPQ, review important terms and definitions.

Batch Quantity

This allows you to price products by lots or bunches, such as $10 for every 32 units. Batch pricing recalculates the quantity you enter by a divisor you assign to a product.

Block Price

Allows you to assign a fixed price to a product based on quantity, overriding the automatic calculation of quantity * unit price.

Configuration Attribute

Help guide the configuration when tied to Product Rules. For example, they can allow a user to specify the number of students of a Training Product. They can be associated to Features and be specified where they are displayed so there can be different sets of Configuration Attributes within each feature. Configuration attributes are mapped to fields on the Product Option object and can be mapped to the quote Line object. They can be used to enter information on the quote line specific to certain products or used to drive Product Selection rules.

Contracted Prices
Prices that you have negotiated with specific customers and should be automatically applied to all quotes for that customer. They are available on the account and can be applied to any product in any price book. Contracted prices can be constrained to a specific time period.

Co-Terminated Subscriptions
Users can add subscription products to an active contract. Salesforce CPQ automatically prorates prices to co-terminate the subscription with the contract. Users are presented with a prompt at the time of quote creation if the account has an active contract eligible for co-termination.

Customer Price
Price of the product after applying discretionary discount. It is calculated as regular price - additional discount.

Distributor Discount
This is a discount that is applied to partner price and reflected in the net price.

Guided Selling
Create a set of questions to prompt users to narrow down the number available to select from based on their responses. Users can quickly find the products they're looking for even if you have a large catalog. You can also display different prompts for the rep for different groups of products. This is useful if you have two different product lines on a single quote and you want a different guided selling process invoked for these product lines based on the quote line group.

Line Column
Record that allows an administrator to define a specific quote line field to be displayed in one or multiple line items template sections.

List Price
Salesforce CPQ handles list prices like Salesforce product pricing on opportunities. Each quote line has a list price that originated in the price book.

Markup Price
Salesforce CPQ can determine price by the product cost plus a markup amount. The calculated value is stored in the regular price.

Merge Fields
Salesforce CPQ quote Templates allow you to create mail-merge documents that dynamically populate your quote. Merge Fields allow you to set up placeholders for this data in your template content or dynamic quote terms, and generate a PDF Document using the layout in your quote Template.

Option Constraints
Constraints placed on products defined in the Options Related List. They control which options may or may not be purchased together. Option Constraints are used to set up option dependencies and exclusions; they can be applied to real-time rule processing, which gives immediate feedback to the sales rep.

Partner Discount
If your organization sells through a channel/VARl, you can give a "partner discount" on quote or the individual product line item on the quote. By default, partner discounts are applied after all automatic and discretionary discounts. Salesforce CPQ applies the partner discount to the price and stores the result in the Partner Price.

Price Rules
Price rules set individual fields or a combination of fields within the Edit Lines screen. A flexible way of automating price calculations and updating quote line fields. Set price rules to automatically discount quote line items based on product or quote attributes. You can set as many conditions as you like and specify whether one or all conditions should be met to trigger the resulting actions. In this case, each price rule must have at least one condition and one action, allowing you to deliver the desired discount when your conditions are met. You can also specify the order in which multiple price rules should be evaluated.

Product
Anything that can be identified as an individual line item on the quote. Core product offerings that the customer sells are products. Ancillary products, options, accessories, add-ons, spares, or other forms of supplementary products are also products. Any product,

component, accessory, or part that could possibly be a quote line or an option in a bundle, needs to be added as a product record in Salesforce.

Product Configuration Rules
Configuration rules tie a product rule to one or several product bundles.

Product Features
Categories or groups of product options within a bundle. Product options of the same feature may have several constraints, such as “pick one or more” and “pick 2 of 5.”

Product Options
Components of a bundle that are also products and could contribute to the bundle price. Product options can be associated with features; how the different components behave in relation to configuration, pricing, and constraints can also be configured.

Product Rules
Checks the quote line items and verifies that there are no invalid product combinations at the line editor level. Quantity of quote product rules directly affects performance of the Edit Lines screen and should be limited to avoid Salesforce.com governor limits.

Product Selection Rules
These rules perform an action in a bundle allowing automation of a bundle configuration. They contain a set of conditions and a set of actions. They can be used to automatically select or deselect product options of a bundle, or enable or disable them, or show or hide them. As for Product Validation Rules, you can take advantage of Summary Variable to drive conditions under which the rules trigger.

Product Validation Rules
Ensure that the data a user selects meets certain standards. These contain a condition to be met, and an error message; they can be used to ensure that the configured bundle is valid. Summary Variables can be used to see if conditions are met. These rules can target either quote Lines, or Product Options in a bundle.

Prorated List Price
For subscription products, this is the adjusted price for the total contract value, considering the subscription’s duration. The duration of the subscription is determined by the Subscription Term, or the Start and End Date.

quote
Stores all the details of the products and prices quoted for an opportunity. Just like opportunities have many product line items, quotes have many quote line items. An opportunity can have many quotes that you can view from a quotes related list on an Opportunity page layout.

Quote Line Editor
The Line Editor is where you edit and configure the Line Items that appear in your quote.

Renewals
A process by which subscription products (those with a price per time period) are renewed for another term. The renewals process automates the creation of opportunities and quotes for subscription products that renew at the end of a contract. Salesforce CPQ uses Salesforce's standard account-related contracts. A renewal creates assets for each non-renewable quote line item on the account record based on the value of a picklist field on the product record. It also creates subscription records for each renewable quote line item on the contract.

Quote Template
A quote template is a combination of predetermined formatting elements for the arrangement of quote data for presentation, typically in PDF format. Similar to Salesforce email templates, a quote template contains the design, content, and layout of your generated quote documents. Some content can be dynamic, such as the Expiration Date, while other content can be static, like the Company Address or Slogan. You can define dynamic content using merge fields as you would elsewhere in Salesforce.

Regular Price
Price of the product after volume and term discounts, after application of a contracted price, or as set in special price.

Special Price
Allows users to change a product's list price. When special pricing is in effect, it overrides the regular price.

Subscription Pricing
This can be based on a fixed price, or a percent of the total, which Salesforce CPQ calculates dynamically. Also, the percent of total can be based on some quote items using a filter, quote items in a group, or all quote items.

Template Content
An element of the quote template where the content is stored and is used to display the varying portions of the template. Administrators can create and modify these records using the supplied rich text editor, or by modifying the underlying HTML and inline CSS directly.

Template Section
This contains the template content you want displayed and where to display it vertically on the quote document. Template sections represent the structure of the content throughout the quote template.

Total Price
Automatically calculated as: unit price * quantity, and prorated as necessary for subscription products.

User Profile
Allows proper permissions and provisioning of Salesforce CPQ licenses to the appropriate users. Not every Salesforce user has to be a Salesforce CPQ user, but all Salesforce CPQ users must be Salesforce users. They must also have a standard Salesforce user license and a custom profile. You can determine which Salesforce users get a Salesforce CPQ license by assigning them a Salesforce CPQ license from the managed package.

Volume Discount
Discount schedules allow you to specify discounts in terms of percentage or amount to be discounted off the product's price using the quantity purchased or term. You can set the quantity or term ranges in tiers of different discount percentages. This discount is applied to both the List Price and the resulting discount.

CPQ Account Fields

Salesforce CPQ provides various custom managed fields for the account object.

EDITIONS

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Combine Asset Quantities	SBQQ__AssetQuantitiesCombined__c	Checkbox	Combine multiple asset records for the same product into one quote line on your renewal quote. If you contracted a quote containing assets with one-per-unit asset conversion, you have several asset records for the same product.
Combine Co-Termed Contracts	SBQQ__CoTermedContractsCombined__c	Checkbox	Control how Salesforce CPQ renews co-terminated contracts when you don't have a master

Field	API Name	Data Type	Definition
			contract. By default, when you renew co-terminated contracts, Salesforce CPQ organizes renewable subscriptions and assets by contract into quote line groups in the renewal quote. When this field is active, Salesforce CPQ instead places the renewable subscriptions and assets into the renewal quote without groups. You can use this field when you renew multiple contracts at once from an account or through a batch job.
Contract Co-Termination	SBQQ__ContractCoTermination__c	Picklist	Determines how Salesforce CPQ co-terminates contracts for this customer. If you choose Always, you can pick whether Salesforce CPQ always co-terminates contracts for renewal opportunities or for add-on opportunities. If you choose Prompt, Salesforce CPQ co-terminates only for add-on opportunities.
Ignore Parent Contracted Prices	SBQQ__IgnoreParentContractedPrices__c	Checkbox	When sales reps create contracted prices on this account's child accounts, the contracted prices do not inherit their values from the account parent.
Preserve Bundle Structure	SBQQ__PreserveBundle__c	Checkbox	Maintain bundle layout on renewal quotes and amendment quotes.
Price Hold End	SBQQ__PriceHoldEnd__c	Date	When sales reps renew a contract before this date, Salesforce CPQ uses the same product prices as the previous renewal. After this date, Salesforce CPQ calculates renewal product pricing based on the contract's renewal pricing method.

Field	API Name	Data Type	Definition
Renewal Model	SBQQ__RenewalModel__c	Picklist	Contract-based renewals create subscription records for subscription products and manage subscription information with the contract record. Asset-based renewals don't create subscriptions or contracts. This method is useful for users who don't sell subscription products or who use only percent of total products to represent their subscription products.
Renewal Pricing Method	SBQQ__RenewalPricingMethod__c	Picklist	This field controls how Salesforce CPQ calculates renewal product prices on a renewal quote. • Same: Use the same prices as the original quote. • List: Use a product's list price. • Uplift: Use the same price as last time plus an uplift.

CPQ Page Layouts

Keep your CPQ records accurate and organized with these recommended page layouts.

EDITIONS

Available in: All Salesforce CPQ Editions

CPQ Account Page Layout

To keep your account records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

CPQ Asset Page Layout

To keep your asset records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

Contract Page Layout for CPQ

To keep your contract records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

CPQ Opportunity Page Layout

To keep your opportunity records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

CPQ Product Page Layout

To keep your product records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

CPQ Product Option Page Layout

To keep your product option records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

CPQ Quote Page Layout

To keep your quote records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

CPQ Account Page Layout

To keep your account records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

EDITIONS

Available in: All Salesforce CPQ Editions

Sections

Table 1: Salesforce CPQ Information

Column 1	Column 2
Type	Industry
Annual Revenue	Employees
Ignore Parent Contracted Prices	Default Opportunity
Description	

Table 2: Address Information

Column 1	Column 2
Billing Address	Shipping Address

Table 3: Renewal / Co-Term Information

Column 1	Column 2
Contract Co-Termination	Price Hold End
Co-Termination Event	Combine Asset Quantities
Renewal Pricing Method	Combine Co-Termed Contracts
Renewal	Preserve Bundle Structure

Related Lists

The bolded titles represent the related list name, while the entries below represent the fields each related list contains.

Quotes

Quote Number

Net Amount

Status

Contracts

Contract Number

Status

Contract Start Date

Contract End Date

Contract Term

Contracted Prices

Contracted Price Number

Product

Price

Discount

Filter Field

Operator

Filter Value

Non Discountable

Effective Date

Assets

Asset Name

Serial Number

Install Date

Quantity

Contact Name

Status

Competitor Asset

Subscriptions

Subscription Number

Product

Quantity

Start Date

End Date

Renewed Date

Terminated Date

Other Layout Information

Remove the New button from the following related lists.

- Quotes
- Contracts
- Subscriptions

CPQ Asset Page Layout

To keep your asset records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

EDITIONS

Available in: All Salesforce CPQ Editions

Sections

The Asset Detail section is on the Asset page layout by default, but make sure it has the following fields.

Table 4: Asset Detail

Column 1	Column 2
Asset Name	Status
Product	Price
Account	Quantity
Contact	Purchase Date
Competitor Asset	Install Date
Serial Number	Usage End Date
Location	Quote Line
Description	Subscription Quote Line

Contract Page Layout for CPQ

To keep your contract records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

EDITIONS

Available in: All Salesforce CPQ Editions

Sections

Table 5: Sales Contract Information

Column 1	Column 2
Liability Cap	Renewal Language
Governing Law	SLA
Contract Start Date	Contract End Date

Column 1	Column 2
Contract Term (months)	Renewal Uplift (%)
Company Signed By	Customer Signed Title
Customer Signed Date	

Table 6: Salesforce CPQ Information

Column 1	Column 2
Preserve Bundle Structure	Opportunity
Renewal Forecast	Quote
Renewal Quoted	Renewal Opportunity
Combine Subscription Quantities	Renewal Term
Renewed	Renewal Uplift (%)

Table 7: Amendment Information

Column 1	Column 2
Amendment Start Date	Amendment Owner
Activated By	Amendment Opportunity Stage
Created By	Activated Date
Price Book	Last Modified By
Amendment & Renewal Behavior	Disable Amendment Co-Term

Table 8: Address Fields

Column 1	Column 2
Contract Name	Company Signed Date
Master Contract	Renewal Owner
Customer Signed By	Renewal Opportunity Stage
Default Renewal Partners	Renewal Opportunity Record Type Id
Default Renewal Contact Roles	Order
Special Terms	Shipping Address
Description	

CPQ Opportunity Page Layout

To keep your opportunity records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

EDITIONS

Available in: All Salesforce CPQ Editions

Sections

The Opportunity Information section is on the Opportunity layout page by default, but make sure it contains the following fields.

Table 9: Opportunity Information

Column 1	Column 2
Opportunity Owner	Close Date
Opportunity Name	Stage
Account Name	Probability (%)
Type	Add On
Next Step Description	

Table 10: Salesforce CPQ Configuration

Column 1	Column 2
Expected Revenue	Amount

Table 11: Salesforce CPQ Configuration

Column 1	Column 2
ARR	ACV (1st Year)
MRR	TCV
NRR	Margin (Amt)
	Margin (%)

Table 12: Salesforce CPQ Information

Column 1	Column 2
Create Contracted Prices	Contracted
Primary Quote	Renewal
Price Book	Renewed Contract
Ordered	Amended Contract

Table 13: Approval Information

Column 1	Column 2
Approval Status	Discount %
Approver	Payment Terms
Approval Step	Custom Product
Created By	Last Modified By

Related Lists

The bolded titles represent the related list name, while the entries below represent the fields each related list contains.

Quotes

Primary

Quote Number

Net Amount

Status

Created By

Start Date

Orders

Order Number

Status

Order Start Date

Contract Number

Order Amount

Contracts

Contract Number

Status

Account Name

Contract Start Date

Contract End Date

Contract Term (Months)

Quote Documents

Document Name

Products

Product

Quantity

Sales Price

Date

Line Description

Parent ID

CPQ Product Page Layout

To keep your product records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

EDITIONS

Available in: All Salesforce CPQ Editions

Sections

Table 14: Salesforce CPQ Information

Column 1	Column 2
Pricing Method	Pricing Method Editable
Quantity Editable	Exclude From Opportunity
Non Discountable	Hidden
Discount Schedule	Lock Description
Price Editable	Optional
Cost Editable	Sort Order

Table 15: Salesforce CPQ Subscriptions

Column 1	Column 2
Subscription Pricing	Percent of Total (%)
Subscription Term	Percent of Total Base
Term Discount Schedule	Percent of Total Category
Renewal Product	Include In Percent of Total
	Exclude From Percent of Total

Table 16: Salesforce CPQ Configuration

Column 1	Column 2
Component	Configuration Fields
Configuration Event	Configuration Form Title
Configuration Type	Configured Code Pattern
Option Layout	Disable Recognition
Term Discount Level	Option Selection Method

Table 17: Salesforce CPQ Assets

Column 1	Column 2
Asset Conversion	Asset Amendment Behavior

Related Lists

The bolded titles represent the related list name, while the entries below represent the fields each related list contains.

Features

Feature Name

Min Options

Max Options

Number

Options

Option Name

Feature

Bundled

Selected

Required

Quantity

Type

Option Constraints

Constraint Name

Feature

Target Field

Required

Configuration Attributes

Attribute Name

Feature

Target Field

Required

Configuration Rule

Rule #

Active

Block Price

Price Name

Lower Bound

Upper Bound

Price

CPQ Product Option Page Layout

To keep your product option records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

EDITIONS

Available in: All Salesforce CPQ Editions

Sections

Table 18: Salesforce CPQ Information

Column 1	Column 2
Option Name	Configured SKU
Number	Optional SKU
Quantity	Feature
Quantity Editable	Type
Selected	Bundled
Required	Unit Price
Min Quantity	Discount (%)
Max Quantity	Discount (Amt)
Discount Schedule	

Table 19: Optional SKU Information

Column 1	Column 2
Product Code	Price Editable
Product Name	Product Configuration Type
Product Description	

Table 20: Advanced Settings

Column 1	Column 2
Component Code	Component Code Position
Component Description	Component Description Position
Quote Line Visibility	Discounted By Package
Percent of Total Scope	Uplifted By Package
Apply Immediately	Apply Immediately Context
System	

CPQ Quote Page Layout

To keep your quote records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists.

EDITIONS

Available in: All Salesforce CPQ Editions

Sections

The Asset Detail section is on the Quote page layout by default, but make sure it has the following fields.

Table 21: Quote Detail

Column 1	Column 2
Quote Number	Account
Primary	Opportunity
Start Date	Type
Subscription Term	Status
Expires On	Sales Rep
Primary Contact	Quote Lines View

Table 22: Address Information

Column 1	Column 2
Bill To Name	Ship To Name
Bill To Street	Ship To Street
Bill To City	Ship To City
Bill To State	Ship To State
Bill To Postal Code	Ship To Postal Code
Bill To Country	Ship To Country

Table 23: Partner Information

Column 1	Column 2
Distributor	Partner
Distributor Discount	Partner Discount
	Avg. Partner Disc. (%)

Table 24: Deal Desk

Column 1	Column 2
List Amount	Total Contract Value
Net Amount	Annual Contract Value (1st Year)
Customer Amount	Incremental Service Value
Additional Disc. (%)	Total ARR
Addl. Disc. Amount	Total MRR
Total Customer Disc. Amount	Total NRR
Avg. Customer Disc. (%)	Total Cost
Lost Revenue Due to Discounting (%)	Margin (%)
Lost Revenue Due to Discounting (Amt)	Margin (AMT)

Table 25: Quote Summary

Column 1	Column 2
Software Total	Services Total
Hardware Total	Professional Services Total
Software Maintenance Total	Training Total
Hardware Maintenance Total	Custom Item Total

Table 26: Approval Information

Column 1	Column 2
Approval Level	Approval Needed From:

Table 27: Print Options

Column 1	Column 2
Print Cover Letter	Print Discounts
Auto Group Line Items	Print Line Item Prices
Print Line Items	Print Terms
Introduction	Notes

Table 28: Sales Contract Information

Column 1	Column 2
Master Contract	Governing Law
Payment Terms	Include Trial Provisions
Additional Terms	Account Renewal Model
Liability Cap	Renewal
SLA	Renewal Uplift (%)
Billing Frequency	Custom Contract Status
Resource Location	Order By Quote Line Group
Quote Process ID	

CPQ Package Settings

Salesforce CPQ package settings control the properties of feature areas within Salesforce CPQ.

EDITIONS

Available in: All Salesforce CPQ Editions

Configure Salesforce CPQ Package Settings
Access the Salesforce CPQ Settings Editor to change settings across the entire package.

Document Package Settings
Document page settings manage the creation, distribution, and storage of CPQ quote documents.

Group Package Settings
Group package settings manage the naming and organization of your quote's quote line groups and solution groups.

Line Editor Package Settings
Line editor package settings manage the organization, display, and sales rep accessibility of the quote line editor.

Plug-in Package Settings
Plugin package settings let admins integrate with the optional plugins that you can use with Salesforce CPQ.

Pricing and Calculation Package Settings
Pricing and calculation package settings manage price calculation on CPQ quotes.

Subscription and Renewal Package Settings
Subscription package settings manage the subscription, renewal, amendment, and contracting processes throughout Salesforce CPQ.

CPQ Quote Package Settings
Quote package settings manage the creation and maintenance of quotes throughout Salesforce CPQ.

CPQ Order Package Settings
Order package settings manage the creation of CPQ orders.

Additional CPQ Package Settings
Additional package settings manage the operation of Salesforce CPQ.

Configure Salesforce CPQ Package Settings

EDITIONS

Available in: All Salesforce CPQ Editions

Access the Salesforce CPQ Settings Editor to change settings across the entire package.

1. From Setup, enter `Installed Packages`, and then select Installed Packages.
2. Find the Salesforce CPQ package and click **Configure**.
3. Navigate between the setting area tabs to change your settings.
4. Click **Save** when you're done.

Document Package Settings

EDITIONS

Available in: All Salesforce CPQ Editions

Document page settings manage the creation, distribution, and storage of CPQ quote documents.

Field Name	Description
Document Folder	Select the folder that contains quote documents after generation.
Attachment Target	Choose a target object. • Document Only: Quote documents are available in the chosen Salesforce Documents folder. • Quote: Quote documents are saved in the chosen Salesforce Documents folder and in the quote's Notes and Attachments related list. • Opportunity: Quote documents are saved in the chosen Salesforce Documents folder and in the opportunity's Notes and Attachments related list.
Post to Feed?	Post quote documents to the Chatter feed associated with the quote or opportunity attachment target. If you delete the quote document, the Chatter feed shows that the document is no longer available.
Allow Output in Different Languages	Allow sales reps to generate quote documents in one of your org's supported languages. This adds a Locale picklist to the Generate Documents Page. You must also have translated values stored for the languages that they can select. You must also have translated values stored in the language they select.
Document Service Endpoint	Specifies the endpoint of a document web service used in DocuSign and EchoSign integrations. Do not change this value unless Salesforce CPQ support instructs you to.

Field Name	Description
Full Page Preview	Preview the quote document in a full window instead of an iFrame.
Hide Document Name	Hide the file name on a quote document. This setting is useful if you want to prevent sales reps from changing the default file name.
Mass Document User Name	
Exclude Hidden Lines in Group Totals	If your quote contains hidden quote lines, Salesforce CPQ does not evaluate them when calculating quote line group totals for a quote document.

Group Package Settings

Group package settings manage the naming and organization of your quote's quote line groups and solution groups.

EDITIONS

Available in: All Salesforce CPQ Editions

Field Name	Description
Solution Groups Enabled	Allow admins to create solution groups for sales rep use in the quote line editor. Solution groups let you group and subtotal products independently of other quote lines and quote line groups. This is useful if your company has a standard set of quote line groupings, such as hardware or software.
Object	Choose the object to use as the basis of your solution group. You can choose from any Salesforce CPQ object. This option is available only when solution groups are enabled.
Name Field	Choose the name to use for solution groups in your org. You can choose from any Salesforce CPQ field associated with the object you chose in the Object setting. This option is available only when solution groups are enabled.
Description Field	Choose the description field that you want to use for solution groups in your org. You can choose from any Salesforce CPQ field associated with the object you chose in the Object setting. This option is available only when solution groups are enabled.
Require Group Name	Sales reps are required to edit group names in the quote line editor.

Line Editor Package Settings

Line editor package settings manage the organization, display, and sales rep accessibility of the quote line editor.

EDITIONS

Available in: All Salesforce CPQ Editions

Field Name	Description
Hide Renewed Assets When Editing	Hide line items for renewed assets in the quote line editor. Renewed assets don't have a net total, can't be discounted or marked up, and are used only to contribute to a percent of total product's final price. We recommend hiding them if you want your sales reps to focus only on editable quote lines.
Visualize Product Hierarchy	Indent the components of bundle products, including nested bundles. This feature makes your bundles easier to read, especially if they have many product options or layers of nested bundles.
Preserve Bundle Structure	Display a bundle's product options in the same order in renewal quotes. This feature is useful if you organized your bundles with important or frequently edited product options at the beginning of the bundle.
Keep Bundle Together	When you drag and drop a bundle parent to a different location in the quote line editor, Salesforce CPQ moves its components to the new quote line position as well.
Totals Field	Salesforce CPQ summarizes the value of this quote line field across your quote and shows the result in the quote line editor's Total field. Net total is the default value.
Line Subtotals Field	Salesforce CPQ summarizes the value of this quote line field across your quote and shows the result in the quote line editor's Subtotal field. Net total is the default value.
Large Quote Threshold	Quotes with line counts above this value send only essential quote lines, rather than every quote line on the quote during UI calls. When the threshold is active, Salesforce CPQ also ignores quote-scoped product rules for that quote. You can define a threshold to improve quote line editor performance if you have large quotes. Plan on adjusting your large quote threshold when you start encountering governor limits.

Field Name	Description
	We recommend that your value is slightly lower than the number of lines on your quote when you start to hit the limits.
Enable Large Quote Experience	Revise the quote line editor layout so sales reps have an easier time navigating large quotes.
Actions Column Placement	Place the Delete and Edit actions to the left or right of quote lines in the quote line editor.
Enable Multi Line Delete	Sales reps can select multiple quote lines and then delete them.
Product Configuration Initializer	If your company uses a custom Visualforce page for its configurator, provide a lookup to the page here.
Enable Asset Upgrades	Sales reps can click Upgrade Assets in the quote line editor. Enable this setting if your org uses Upgrade Products.
Group Subtotals Field	Salesforce CPQ summarizes the value of this quote line field across your quote and shows the result in the quote line editor's Group Total field. Net total is the default value.
Wrap Buttons	Quote line editor buttons wrap to a row below the first button row.
Quote Batch Size	Quote load and save actions process this number of quote lines per batch. The default value is 150. Smaller batches are less likely to hit governor limits. Larger batches cause better quote line performance because the editor makes fewer round trips.

Plug-in Package Settings

Plugin package settings let admins integrate with the optional plugins that you can use with Salesforce CPQ.

EDITIONS

Available in: All Salesforce CPQ Editions

Field Name	Description
Page Security Plugin	This page security plug-in overrides field security in custom pages.
Billing Plugin	The Apex class that implements the Salesforce Billing plug-in interface.
Quote Calculator Plugin	The custom script object that contains the Javascript Quote Calculator plug-in.
Electronic Signature Plugin	The Apex class that implements the Electronic Signature Plugin interface.
Product Search Plugin	The Apex class that provides search function customization for the CPQ product lookup feature. This class must implement the SBQQ.ProductSearchPlugin interface.

Field Name	Description
Document Store Plugin	The Apex class that integrates to your preferred document-management provider.
Order Management Plugin	The Apex class that implements the SBQQ__OrderManagementPlugin interface. Salesforce CPQ uses the Order Management Plugin field to set a CPQ order's start date. It passes a quote ID to the plugin and expects a Date value in return.

Pricing and Calculation Package Settings

Pricing and calculation package settings manage price calculation on CPQ quotes.

EDITIONS

Available in: All Salesforce CPQ Editions

Field Name	Description
Currency Symbol	Salesforce CPQ uses this currency symbol in the quote line editor and on generated documents. Provide a value here only if you use a single currency.
Unit Price Scale	Fractional unit prices round off to this many decimal places.
Enable Quick Calculate	The Quick Calculate feature improves quote calculation time by disabling the following features. • Price rules • Quote line formula fields that depend on parent relationships • Displaying rollup summary fields in the quote line editor
Allow Non-Consecutive Custom Segments	Custom price dimensions for MDQ products can begin any number of days after the previous segment's end date. By default, a custom segment must begin the day after the previous segment's end date.
Use Inactive Prices	Use inactive product prices.
Calculate Immediately	Lets admins disable real-time calculations in the quote line editor and perform all calculation actions when a sales rep saves the quote. This feature can improve quote line editor performance.
Disable Background Calculation Refresh	When Salesforce CPQ calculates a quote in the background in response to a save, it doesn't refresh standard object pages. Refreshing in this

Field Name	Description
	situation is disabled in Lightning Experience and the Salesforce app.

Subscription and Renewal Package Settings

Subscription package settings manage the subscription, renewal, amendment, and contracting processes throughout Salesforce CPQ.

EDITIONS

Available in: All Salesforce CPQ Editions

Field Name	Description
Renewal Model	When admins contract an opportunity or order with at least one subscription product under a contract-based renewal model, Salesforce CPQ creates a contract record. It then creates subscription records for your subscription products and asset records for your products with asset conversion. Use this method if your company sells many subscription products and wants to keep detailed records of their start and end dates. When admins contract an opportunity or order under an asset-based renewal model, Salesforce CPQ creates asset records for all your non subscription products with asset conversion. Use this method if your company doesn't sell subscription products or uses only percent of total products to represent subscription products.
Allow Renewal Quotes Without Assets	Salesforce CPQ treats non-subscription lines on renewal quotes as renewed products. This feature prevents add-on opportunities because all non-subscription lines have prices of zero.
Subscription Prorate Precision	For quote lengths that include partial months, users can prorate subscription prices by month, day, or month and day.
Contract in Foreground	Salesforce CPQ runs the contracting process in the foreground rather than the background. This feature can improve performance but increases the risk of a CPU timeout during processing.
Disable Add Subscriptions	Removes the Add Subscriptions button from renewal quotes.

Field Name	Description
Subscription Term Unit	Salesforce CPQ determines subscription length by evaluating this field with the quote's subscription term.
Include Net-New Products in Maintenance	Products added to a renewal or amendment are included in the scope of percent of total products from the original quote.
Re-Evaluate Bundle Logic on Renewals	Renewing a bundle while this setting is active runs all configuration rules and adds all required products. This setting provides the same features as a user manually finding the renewal quote, reconfiguring the bundle, and then saving it.

CPQ Quote Package Settings

Quote package settings manage the creation and maintenance of quotes throughout Salesforce CPQ.

EDITIONS

Available in: All Salesforce CPQ Editions

Field Name	Description
Disable Initial Quote Sync	By default, when a sales rep creates the first quote from an opportunity, Salesforce CPQ creates quote lines for each of that opportunity's opportunity products. When this setting is active, Salesforce CPQ doesn't create quote lines for those opportunity products. Note: When Salesforce CPQ creates quote lines from opportunity bundle products, it doesn't include bundle structure data.
Disable Quote Contact Defaulting	When sales reps make a quote from an opportunity, the quote doesn't inherit its primary contact from the opportunity. The sales rep or a Salesforce admin enters the quote's primary contact instead.
Allow Option Deletion	Sales reps can delete product options from prior quotes.
Disable Quote Address Defaulting	When sales reps make a quote from an opportunity, the quote doesn't inherit its address from the opportunity. The sales rep or an admin enters the quote's address instead.
Primary Quote Keeps Opportunity Products	When a sales rep deselects the Primary field on a quote, the quote keeps the opportunity products it inherited when it was made primary.

Field Name	Description
Default Quote Validity (Days)	Sales reps can't edit quotes that have passed their validity dates. By default, a quote is valid for 30 days after it is created.

CPQ Order Package Settings

Order package settings manage the creation of CPQ orders.

EDITIONS

Available in: All Salesforce CPQ Editions

Field Name	Description
Require Approved Quote	Sales reps can't order a quote until it has a Status field value of Approved.
Allow Multiple Orders	Sales reps can split a quote's quote lines into multiple orders. This setting is available only in Salesforce CPQ+.
Default Order Start Date	Orders start on this date by default.

Additional CPQ Package Settings

Additional package settings manage the operation of Salesforce CPQ.

EDITIONS

Available in: All Salesforce CPQ Package Settings

Field Name	Description
Triggers Disabled	Disable CPQ triggers temporarily if you're migrating data or performing another action where you do not want to fire triggers.
Quantity Scale	The scale of quantity fields in custom pages and quote documents.
Sort Products In Memory	Sorting products in memory during product search can improve CPQ page loading speeds for customers with large pricebooks.
Multiple Bundles View	The configurator has two display options for quotes with multiple bundles. • Wizard: Display each bundle separately. Admins can use the product field Option Layout to customize how sales reps move between bundle features. • Classic: Display all bundles on one page, separated with a Section layout.
Use Global Header Permission	Enforce a custom permission that admins can assign to users to hide the Salesforce header in custom pages. This permission only works in Aloha.

Field Name	Description
Service Region	Operate advanced calculator and document generation web services in this region.
Open Search Filter By Default	Display the search filter when sales reps open the quote line editor. Enable this feature if sales reps frequently search your product catalog.
Product Results Group Field Name	When sales reps search for a product in the quote line editor, Salesforce CPQ groups the results by this field. For example, you could display search results organized by product family.
Product Description Field	Choose a product object field to use as the product description. Salesforce CPQ uses the Product Description field by default. This field is required if you want to use rich-text product descriptions.
Theme	Apply this theme to Visualforce pages for all this org's users. User-assigned themes override this value.
OAuth Refresh Token	Salesforce CPQ runs Mass Document Generation batch processes under this user.
External Configurator URL	Salesforce CPQ opens this URL when a sales rep configures a product marked as externally configurable.
Enable Product Option Drawer	Allow admins to create a set of configuration attributes that sales reps can assign to any number of product options.

CPQ Products

Products are items that users can add to a quote.

Create individual product records manually or perform a bulk upload of product data from an external source.

EDITIONS

Available in: **All** CPQ Editions

Types of Products
Configure your products to match your pricing and selling needs.

Product Pricing Methods
Apply various discounts or markups to customize pricing on your products.

Summary Variables
Summarize number field information about products into a single object called a summary variable. You can then reference the summary variables in your quotes, quote line fields, and product rules.

CPQ Product Fields
Salesforce CPQ provides various custom managed fields for products.

Types of Products

Configure your products to match your pricing and selling needs.

EDITIONS

Available in: **All** CPQ Editions

Product Bundles

A bundle is a product with optional features or components that you want to include on a single quote line.

MDQ Products

You can show a product in the quote line editor as a single quote line with multiple segments. Each segment represents a block of time (quarter, month, year, or custom) and has a quantity and discounts independent of the other segments. This feature is useful if you're selling subscription products and services, because you don't have to add multiple quote lines for each segment.

Subscription Products

Subscription products are services that run for a set period, such as a year-long support service. Salesforce CPQ automates pricing, prorating, and coterminating subscriptions on contracts and renewals.

Usage-Based Products (Beta)

Quote and price your products based on predefined rates for future consumption of the product or service you're selling. The price scales alongside usage, reducing initial purchase barriers and driving higher revenue. You can configure your units of usage and setup different pricing rates based on usage volume.

Add Images to Product Records

Use a formula field to associate an internal or external image with a product record. You can then show this image in product search results, quote documents, or the quote line editor. Images help your sales reps provide examples to customers during the quote development process.

Product Bundles

A bundle is a product with optional features or components that you want to include on a single quote line.

EDITIONS

Available in: **All** CPQ Editions

A bundle product contains several records.

- A bundle parent: The parent product is the bundle itself.
- Options: These products in the bundle contribute to the bundle price. You can consider these children of the bundle parent. An option doesn't contribute to the bundle price if you select its Bundled checkbox.
- Features: A feature is a group of options. You can use the Min Options and Max Options fields to define selection restrictions for objects in the same feature, such as "pick one or more" or "pick 3 of 5."
- Option constraints: Use constraints to control how users select options together.
- Configuration attribute: A field and picklist shown above or below the list of product options. This field targets all options containing the same field and applies its value to all those fields.

First, choose a product to represent your parent, and at least one product to represent a bundle option. After you create your options, features, and constraints, associate them to the parent via related lists on the parent product record.

Example: Your company sells an IT Professional Pack containing a customizable laptop and related hardware. You structure the IT Professional Pack bundle this way.

Parent: IT Professional Pack

- Feature: Computers
  - Option: Business Laptop

  - Option: Laser Printer
- Feature: Peripherals
  - Option: US Keyboard
  - Option: UK Keyboard
  - Option: Mouse
  - Option: HDMI Display
- Feature: Printing
  - Option: Toner Cartridge
  - Option: Maintenance Kit
  - Option: Letter Paper
  - Option: A4 Paper
- Feature: Networking
  - Option: Wireless Router
  - Option: Wireless Access Point
  - Option: Wireless Installation

Create a Bundle

Configure a bundle product using a combination of options and features.

Add Bundle-Specific Field Sets

Create field sets that display for only products in certain bundle products or product features.

Feature Guidelines

A feature is a group of product options within a bundle. Use features if you want to organize options into set groups, such as hardware and software.

Product Options

Product options are individual products that users can select from when configuring a bundle.

Constraint Guidelines

Enable or disable a product option for selection relative to another product option.

Configuration Attribute Guidelines

Use configuration attributes to set the value of multiple shared product option fields simultaneously.

Guidelines for Using Nested Bundles

A nested bundle lets users select from a subset of options within a single product option.

Unique Quote Line Codes Based on Bundle Configuration

When your sales rep quotes a bundle product, Salesforce CPQ can assign that bundle's quote line a unique package product code based on its configuration. You can define a template for the package product code that contains a combination of static text and variables. Your sales reps can then use each package product code as a SKU to quickly send configured bundle data to their orders team.

Show Bundle Components on the Quote Line

The quote line's Package Product Description field shows a list of selected product options and user-defined static text. Sales reps can use it to quickly reference the configuration of a quoted bundle product.

Create a Bundle

Configure a bundle product using a combination of options and features.

EDITIONS

Available in: **All** CPQ Editions

1. Create or select a product to serve as your bundle parent.
2. Create the features you need from your parent product's related list.

   Remember that the feature's Configured SKU field automatically looks up to your bundle parent if you created the feature in the parent's Features related list.

3. Create the product options you need from your parent product's Options related list. Find your option's Optional SKU field and give it a lookup to the product that you want to serve as the option.
4. If you want a product option to be grouped under feature, populate that option's Feature lookup field.

   If you created your option off a bundle parent, the Feature lookup search results display all the parent's features.

5. Create option constraints from your parent product's Option Constraint related list if needed.

Add Bundle-Specific Field Sets

Create field sets that display for only products in certain bundle products or product features.

EDITIONS

Available in: Salesforce CPQ Summer '15 and later.

For example, in the quote line editor, you could display a Media field for only products that are part of your Software product feature.

1. From Setup, enter `Object`, select **Objects**, and then select **Product Option**.
2. Create your product or feature field sets.

   While you can create any number of new field sets at once, your may use only one bundle-specific field set at a time.

3. Add the API names of your new field sets as values in your product's Configuration Field Set field.
4. Find the bundle parent product that you want to contain your custom field set.
5. Change the product's configuration field set to one of the field sets you created in Step 2.

Note: A feature-level field set overrides a product-level field set.

Feature Guidelines

A feature is a group of product options within a bundle. Use features if you want to organize options into set groups, such as hardware and software.

EDITIONS

Available in: All CPQ Editions

Review the following fields when creating a bundle feature.

Feature Name
: (Required) Provide a meaningful name for your feature

Number
: (Required) Determine how this feature is ordered relative to other features in the parent product record's related list

Configured SKU
: (Required) SKU Number of the bundle that includes this feature. This field populates automatically if you created this feature from the bundle product's detail page.

(Required) Min Options
: Set the minimum number of options for this feature that must be part of the product bundle

Max Options
: Set the maximum number of options for this feature that can be selected as part of the product bundle

Discount Schedule

Lookup to a Discount Schedule that applies to all this feature's options. Pricing from this discount schedule overrides the bundle product's Discount Schedule.

Category

Assign a feature to a category if you want to group multiple features together under a single tab within the configurator.

Option Selection Method

Choose the way users can add products or options to the feature.

- Click: Checkboxes appear next to each option
- Add: Options do not appear in the feature until the user selects **Add Options** and selects from available options on the Option Lookup.
- Dynamic: Users can add products from a separate page.

Product Options

Product options are individual products that users can select from when configuring a bundle.

EDITIONS

Available in: All Salesforce CPQ Editions

Product Option Fields

To create or modify a price action, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

Considerations for Product Options

Keep these considerations in mind when you're working with product options.

Global Attributes

Create a set of configuration attributes so that users can quickly assign the attributes to any number of product options. Each configuration attribute set is shown in a collapsible drawer below each product option in the configurator. This feature reduces the time spent creating product options if your options share some of the same attributes.

Product Option Fields

To create or modify a price action, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

EDITIONS

Available in: All Salesforce CPQ Editions

Review the following fields when creating a product option.

Number

(Required) Determine how this product option is ordered relative to other product options in the parent product record's related list.

Quantity

Enter the quantity of the product option to add to the quote. Leave this field blank if you want the user to enter a quantity when adding it to the quote.

Quantity Editable

Show a note in the quote line editor that users can edit this product's quantity. This feature lets you set a default value for option quantity while allowing users to change it in the quote line editor.

Selected

Select this product option as part of the bundle by default.

Required

Make this product required on the bundle.

Price Editable

Let users change this product option's price in the quote line editor.

Bundled

Indicate that this product is bundled with a parent product. Bundled options have a fixed quantity and a price of zero, because their price is included in the parent product price. Leave this field deselected if users manually add a price to this option.

Min Quantity

Enter the minimum quantity that this product is allowed within its parent bundle.

Max Quantity

Enter the maximum quantity that this product is allowed within its parent bundle.

Discount Schedule

A lookup to a discount schedule that applies only to this product option. Remember, the bundle parent's discount schedule doesn't affect any of the bundle's product options.

Configured SKU

(Required) A lookup to the product that includes this option. This field is completed automatically if you created this feature from the bundle product's detail page.

Optional SKU

A lookup to the product that this option represents.

Feature

Enter or look up the feature that includes this option. This process depends on the configured SKU.

Type

Choose one of the following.

- Component: Choose if this option, including quantity, depends on its parent. When you select this field, the product option's bundle requires it. It also requires that its quantity multiplies by the quantity of the bundle. For example, if two drives are selected for a server and the server quantity changes from one to two, the quantity for the drive's option changes to four.
- Accessory: Choose if this option depends on the parent, but the quantity is independent. For example, when a user enters a quantity for the product option, it remains the same even if the quantity of the bundle changes.
- Related Product: Choose if this option is an independent product that can also be related to a bundle. Use this feature for cross-selling or upselling product options that users can add to the bundle while controlling the option's quantity independently. Related Product options can't be required.

  Warning: If a required or bundled product option has a Type field of Related Product, Salesforce CPQ treats the product option like it's a component. Its quantity is multiplied by the parent product's quantity, and its quantity is not editable in the quote line editor.

- None: The option acts like a component when it's part of a feature. If it's not part of a feature, its quantity is independent and it's not required on the bundle.

Discount

Enter a discount as a percentage or dollar amount. This field is useful when your product option is offered stand-alone but you offer a discount if it's purchased as part of a product bundle.

Unit Price

Enter a value for the unit price of this option. This field overrides the price book's price value.

Considerations for Product Options

Keep these considerations in mind when you're working with product options.

EDITIONS

Available in: All Salesforce CPQ Editions

- The unit price on the product option is given to the quote line, regardless of the quote's currency. For example, you have a quote in USD and a quote in GBP. If you have a product option with a unit price of 10,000 and bring that product option into both quotes, the related quote lines have values of 10,000 in their respective currencies.
- Product options with a Type field value of Related Product cannot have their Bundled field or their Required field selected.

  Warning: If a required or bundled product option has a Type field of Related Product, Salesforce CPQ treats the product option like it's a component. Its quantity is multiplied by the parent product's quantity, and its quantity is not editable in the quote line editor.

- When you're using a renewal product option, both the original product option and the renewal must have the same values for the Type field.
- If you want to let sales reps upsell a product option, enable its Quantity Editable field and set its type to Related Product. This setup allows sales reps to edit these types of product options in both the configurator and the quote line editor - make sure you consider this when setting up quantity-based validation rules.
- Because the Bundled field sets a product option's price to zero, sales reps can't apply a discount to it.
- Renewed product options with Discounted By Package selected do not inherit discounts from their parent product.
- The Discounted By Package field supports only percentage-based discounts from the parent product. When you renew a quote where the Renewal Pricing Method field is set to Same, Salesforce CPQ adjusts prices where needed by applying amount-based discounts. Because of this process, renewed product options with Discounted By Package selected do not inherit discounts from their parent product. If you want your renewed product option to inherit its parent's discount, try using a price rule to apply the discount from the parent.

Global Attributes

Create a set of configuration attributes so that users can quickly assign the attributes to any number of product options. Each configuration attribute set is shown in a collapsible drawer below each product option in the configurator. This feature reduces the time spent creating product options if your options share some of the same attributes.

EDITIONS

Available in: Salesforce CPQ Winter '18 and later

When you create a configuration attribute record, you can choose whether its record type is Configuration Attribute or Global Attribute. Choosing Global Attribute lets you create the record without assigning it to bundle product. That way, you can use the attribute across several different bundles, or for only certain product options in one bundle. A global attribute needs only a name and a target product option field.

Global attributes use the following objects.

Global Attribute

A configuration attribute that you can assign to any product option. You can enable global attributes in your Salesforce CPQ package settings. Once enabled, when you create a configuration attribute, Salesforce CPQ lets you choose whether its record type is a configuration attribute or a global attribute.

Since global attributes aren't tied to a single bundle, you only have to define their name and target field. You'll use attribute sets and product attribute sets to associate them your product options.

Attribute Set

An attribute set groups several global attributes together in the form of attribute items. After you create your global attributes, you create an attribute set and then create one attribute item in the set for each global attribute.

Attribute Item

An attribute item represents a global attribute that you want to assign to an attribute set. Create attribute items from their related list in the attribute set.

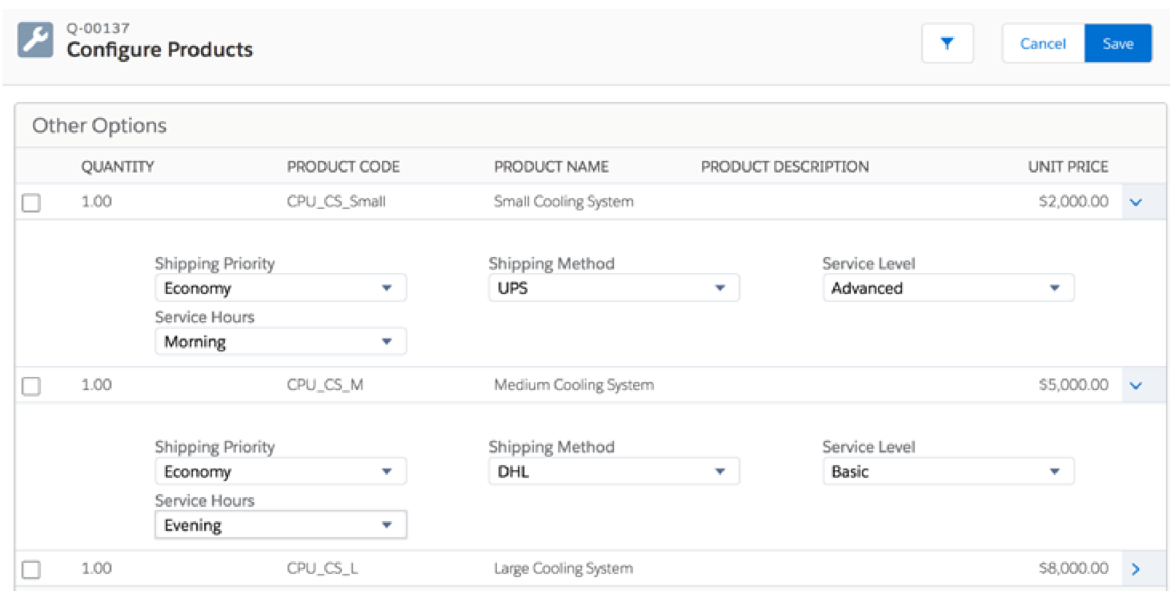
Product Attribute Set

A product attribute set associates an attribute set with a product option. Create product attribute sets from their related list in the attribute set.

A product attribute set has a one-to-many relation with product options. This way, you can use the attribute set as a “bucket” to group several global attributes together. Then you can assign that collection of global attributes to several different product options.

View your product option’s attribute sets in the configurator by clicking the dropdown menu on the right-hand side of your product option. Here you can pick your attribute values as needed. Remember that a global attribute changes field values for only the product option it’s assigned to.

Example: Let’s review how we could use global attributes with a CPU cooling bundle containing product options for a small cooling system, a medium cooling system, and a large cooling system.



- We created global attributes for Shipping Priority, Shipping Method, Service Level, and Service Hours.
- We created one attribute set for shipping options and one attribute set for service options. We used two sets in case we have future product options where we want to assign only shipping options or only service options.
- The Service Options set contains two attribute items — one for service level and one for service hours. The Shipping Options set contains two attribute items as well — one for shipping method and one for shipping priority.
- Each attribute set contains three product attribute sets — one for each type of cooling system.

When we configure the CPU cooling bundle, Salesforce CPQ shows each global attribute as a picklist on each product option. Since each product option has its own product attribute set, you can adjust the attributes independently for each option. Click the arrow icon next to each product option to expand or collapse its global attributes.

Enable Global Attributes

Global attributes are configuration attributes that you can assign to any product options in any number of bundles. Enable global attributes for use in your Salesforce CPQ org.

[Create a Global Attribute](#)

Create global attributes and associate them with one or more product options in one bundle or several bundles. Since global attributes aren't limited to one bundle, you can save time setting up your bundles for sales rep configuration.

[Considerations for Global Attributes](#)

Keep a few things in mind when you're working with global attributes.

Enable Global Attributes

EDITIONS

Available in: Salesforce CPQ Winter '18 and later

Global attributes are configuration attributes that you can assign to any product options in any number of bundles. Enable global attributes for use in your Salesforce CPQ org.

1. Add the Record Type field to your Configuration Attribute page layout.
2. Enable product option drawers.
   a. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
   b. Select **Configure** for your Salesforce CPQ package.
   c. Go to the Additional Settings page and select **Enable Product Option Drawers**.
3. Enable global attributes.
   a. From Setup, in the Quick Find box, enter `Manage Users`, and then select **Profiles**.
   b. Next to the System Administrator profile, select **Object Settings**, and then select **Configuration Attribute**.
   c. Select **Assigned Record Type** for both Configuration Attribute and Global Attribute.
   d. Click **OK** when asked to select a custom record type.
4. Update the Attribute Item page layout.
   a. Remove the Product, Row Order, Column Order, and Position fields from the attribute item page layout.
   b. Add the Attribute Set, Sequence, and Configuration Attribute fields to your attribute item page layout.

Create a Global Attribute

EDITIONS

Available in: Salesforce CPQ Winter '18 and later

Create global attributes and associate them with one or more product options in one bundle or several bundles. Since global attributes aren't limited to one bundle, you can save time setting up your bundles for sales rep configuration.

1. Make sure the Target Field field in your configuration attribute has a value for each product option field that you want available in the attribute set.
   a. From Setup, in the Quick Find box, enter `Objects`, and then select **Objects**.
   b. Click **Configuration Attribute**.
   c. Click **Target Field**.
   d. In the Values related list, click **New**.
   e. Enter the API names of the product options that you want available in the attribute set. Separate each API name with a return.
   f. Select the **Configuration Attribute** and **Global Attribute** checkboxes.
2. Create the global attributes.
   a. From the configuration attributes page, click **New**.

Because you enabled global attributes, Salesforce CPQ shows the Select Configuration Attribute Record Type page.

b. Choose Global Attributes for the record type, and then click **Continue**.

c. Give the attribute a name and target field, and then click **Save**.

3. Create the attribute set.

   a. From the attribute sets page, click **New.**

   b. Give your attribute set a name, and then click **Save**.

4. Add attribute items to the attribute set.

   a. From your attribute set, click **New Attribute Item**.

   b. Entera lookup to the configuration attribute that you want to associate with this attribute item.

   c. Enter a number for the Sequence field.

      In a product option drawer, Salesforce CPQ shows a set's attributes ordered by smallest to largest sequence numbers.

   d. Click **Save**. Repeat as needed for the other configuration attributes that you want included in the attribute set.

5. Add a product attribute set to your attribute set.

   a. From your attribute set, go to the Product Attribute Sets related list and click **New Product Attribute Set**.

   b. Enter a lookup to the product option that you want to associate with this attribute set.

   c. Give the product attribute set a sequence number. This number determines where the attribute set appears relative to other attribute sets on the same configuration option.

   d. Click **Save**. Repeat as needed for any other product options that you want to associate with this attribute set.
      When you configure a bundle containing any of the product options in the product attribute set, each product option shows the configuration attributes you associated with attribute items in Step 4.

Considerations for Global Attributes

Keep a few things in mind when you're working with global attributes.

EDITIONS

Available in: Salesforce CPQ Winter '18 and later

- Formula fields, required fields, and hidden or shown picklist values are not available in global attributes.
- You can't hide global attributes.
- Changing field values in a global attribute doesn't trigger rules set to Apply Immediately. If you want a product rule to target a product option represented by a global attribute, the rule requires an Evaluation Event field with a value of Save.

Constraint Guidelines

Enable or disable a product option for selection relative to another product option.

EDITIONS

Available in: **All** CPQ Editions

You may find it useful to show a product option in your bundle but prevent your sales rep from choosing it until they've selected another option. This way, they don't sell it to a customer without the original option that makes use of it. Once Salesforce CPQ enables the option for selection, your rep can choose whether to select it based on the customer's needs. You can also disable one option from selection relative to another option. For example, sales reps could not select American power cables in a bundle as long as they've selected hardware that requires European power cables.

The option constraint object lets you set up these restrictions. Create option constraints from the Option Constraints related list on your bundle parent product record.

Review the following fields when using option constraints.

Check Prior Purchases
By default, Salesforce CPQ evaluates constraining options only on the quote you're editing. When you select this field, Salesforce CPQ also evaluates previously purchased units of the constraining option on the quote's parent account. These units must be assets or subscriptions in active contracts.

Constrained Option
Lookup to the option that Salesforce CPQ enables or disables.

Constraining Option
Lookup to the option that determines whether Salesforce CPQ enables or disables the Constrained Option.

Configured SKU
(Required) SKU number of the bundle that includes this option. This field is completed automatically if you created this feature from the bundle product's detail page.

Option Constraint Group
Use this field if you have multiple constraints targeting a constrained option and want to require the selection of all their constraining options. In this case, Salesforce CPQ selects the constraining options of all constraint records where the Option Constraining Group has the same value. This feature is useful if you want to require or exclude options based on combinations of other options. The value can be any text string, but we recommend making it descriptive and easy to remember.

Type

Choose the behavior for this constraint.

- Dependency: Selecting the **Constraining Option** causes Salesforce CPQ to enable the **Constrained Option** for selection
- Exclusion: Users can't select the **Constrained Option** if they've selected the **Constraining Option**.

Example: You sell software licenses and offer an software bundle that contains your licenses and several options for each license. You want the configurator to enable a user training class option for selection when a sales rep chooses the data security license option. This way, your sales rep can present training as an option, but doesn't have to select it if the customer has already used the software.

Go to your bundle parent and create an option constraint with the following fields.

- Constraint Name: Training Class for Data Security Software
- Type: Dependency
- Constrained Option: Lookup to your user training class product option record
- Constraining Option: Lookup to your data security license product option record

Example: Let's look at using multiple constraints and option constraint groups. You sell a bundle for custom performance desktops. You want the configurator to enable a water cooler for selection when you select a video card or when you select a large case. Create your option constraints as follows.

- Constraint Name: Video Card Selection
- Type: Dependency
- Constrained Option: Lookup to your water cooler product option
- Constraining Option: Lookup to your video card product option
- Constraint Name: Large Case Selection
- Type: Dependency

- Constrained Option: Lookup to your water cooler product option
- Constraining Option: Lookup to your large case product option

If you want the configurator to enable a water cooler only when both the video card and large case are selected, give both your option constraints the same option constraint group value. For example, you could use “water cooler.”

Configuration Attribute Guidelines

EDITIONS

Available in: **All** CPQ Editions

Use configuration attributes to set the value of multiple shared product option fields simultaneously.

Review the following fields when using configuration attributes.

Apply Immediately
Apply field value changes whenever a user changes the configuration attribute’s value. When deselected, Salesforce CPQ applies field changes when the user saves the bundle configuration.

Apply to Product Options
Apply the configuration attribute’s value to all matching fields in your bundle’s product options. When this field is not selected, Salesforce CPQ applies the value to only matching fields in the bundle parent.

Column Order
If your bundle contains multiple configuration attributes, you can organize them into columns. Column 1 appears to the left side of the configurator, column 2 appears in the center of the configurator, and column 3 appears on the right side of the configurator. Use this field to assign your configuration attribute to a column.

Feature
If your bundle contains features, specify the feature where you want this configuration attribute to appear.

Hidden
Hide the configuration attribute from the configurator UI.

Position
Choose where your configuration attribute appears in the configurator.

- If this configuration attribute doesn’t have a feature, it can appear above or below the bundle’s product options.
- If this configuration attribute has a feature, it can appear above or below the product option within that feature.

Required
Specifies whether users need to choose a value for this field before saving their bundle configuration.

Row Order
If your bundle contains multiple configuration attributes, Salesforce CPQ can use this field’s value to determine their order. Attributes with higher Row Order values are shown first. If you don’t give this field a value, Salesforce CPQ order configuration attributes alphabetically.

Target Field
Lookup to the field that you want to change. This can be any field from any of your bundle’s product options.

You can have up to three configuration attributes in a row.

A configuration attribute:

- Applies its value to your bundle’s fields even if those values aren’t shown in your line editor field set.
- Inherits the type of the field it targets. For example, if you target a picklist, the configuration attribute appears as a picklist with all the targeted field’s values.

When you set a configuration attribute’s value, Salesforce CPQ applies it across all matching fields in your bundle. Salesforce CPQ then considers all configurator-scoped product rules and price rules with parameters that match the changed values.

Inherit Default Value

As of Salesforce CPQ Summer '17, your configuration attributes can inherit their default values from a quote or quote group. Use this feature so you don't have to re-enter certain field values while configuring a bundle.

The configuration attribute field Default Object targets a quote group. The Default Field field can contain the API name of any quote or quote group field. To avoid an error, make sure that your source field and the option field your configuration attribute targets are of the same field type.

Example: You want your IT Professional Pack bundle product to show configuration attributes for Location (a custom field), Unit Price, and Discount (%). Users don't need to enter a value for Unit Price. Create three configuration attributes on your bundle's record and give them the following values.

Configuration Attribute

- Target Field: Location__c
- Required: Selected
- Row Order: 10
- Column Order: 1
- Position: Top

Configuration Attribute

- Target Field: Unit Price
- Required: Not selected
- Row Order: 20
- Column Order: 2
- Position: Top

Configuration Attribute

- Target Field: Discount (%)
- Required: Selected
- Row Order: 30
- Column Order: 3
- Position: Top

Guidelines for Using Nested Bundles

EDITIONS

Available in: All CPQ Editions

A nested bundle lets users select from a subset of options within a single product option.

To create a nested bundle, assign a bundle product to the Optional SKU field of an option record. When users configure the top-level bundle, they'll see a configuration icon on the quote line for the option containing the second bundle.

For easy user navigation, we recommend keeping your nested bundles one to three levels deep.

"Parent bundle" means the configured SKU of the product option represented by the nested bundle. It's not always the top level. It's always the immediate parent of a "child bundle."

Example: Your top-level product in a bundle is a customizable laptop, where the first level of options lets you select the brand of hard drive for the laptop. Create two sets of features on each hard drive brand so you can set the brand's memory size and warranty after a user selects it in the laptop bundle. These hard drive sizes and warranties represent the second level of options in your bundle.

Unique Quote Line Codes Based on Bundle Configuration

EDITIONS

Available in: All Salesforce CPQ Editions

When your sales rep quotes a bundle product, Salesforce CPQ can assign that bundle's quote line a unique package product code based on its configuration. You can define a template for the package product code that contains a combination of static text and variables. Your sales reps can then use each package product code as a SKU to quickly send configured bundle data to their orders team.

This process is useful for sales reps working with quotes that contain many configured objects. If they have a quote containing 100 bundles each with unique configurations, sending a list of SKUs is much faster than sending an order form for each product.

The product's Configured Code Pattern fields defines the template for the package product code. It contains any static text that you want in your package product code, and one or more values enclosed by brackets. The bracketed values refer to a product option field called Component Code Position. When a sales rep quotes a bundle with a configured code pattern, Salesforce CPQ evaluates the bundle's selected product options. If a product option's component code position has a matching value in one of the pattern's brackets, Salesforce CPQ replaces the bracketed value with the product option's component code.

Important: Make sure that your configured code pattern doesn't contain a bracketed value for a bundle without a matching product option to fill that position. In this case, the package product code displays the brackets and original enclosed value without replacing anything.

Example: Your company sells laptops that have a basic chassis and configurable components, such as memory and hard drives. These laptops appear as bundle products in your catalog. To sell a laptop, the company's fulfillment team first configures it based on customer request. A sales rep then records that request by configuring the bundle product within Salesforce CPQ. Since the sales rep may have hundreds of configurable laptops in a single business order, they want to avoid sending a full order form for each configuration.

Let's look at how you can set up this bundle's package product code so that your sales reps can send it as a SKU. You can make a package product code that's easy to understand by giving the component code a similar name to the option's Optional SKU. We also recommend giving your component code positions the same value as the Number field on that option's parent feature. This way, if you list your component code positions in ascending order within the configured code pattern, they appear in the same order that they're listed within the configurator.

Table 29: Laptop: Model LC-001

Feature	Feature's Number	Option 1's Optional SKU	Option 2's Optional SKU	Option 3's Optional SKU
Processor	10	i3	i5	i7
Hard Drive	20	1TB	2TB	4TB
Memory	30	8GB	12GB	16GB

Put `LC-001` at the beginning of the configured code pattern so that it appears on every configured quote line made from this bundle. Next, list your three different component code position values bracketed and in ascending order. We'll separate each component code position with a dash so that the package product code is easier to read. So, your final configured code pattern should be `LC-001-{10}-{20}-{30}`.

Let's see what kind of package product codes your sales rep would get from different configurations.

i3 processor, 1-TB hard drive, 8-GB of RAM

Package Product Code: LC-001-i3-1TB-8GB

i7 processor, 4-TB hard drive, 16-GB of RAM
Package Product Code: LC-001-i7-4TB-16GB

Show Bundle Components on the Quote Line

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

The quote line's Package Product Description field shows a list of selected product options and user-defined static text. Sales reps can use it to quickly reference the configuration of a quoted bundle product.

1. From your bundle product, find the product option you want to edit.
2. Enter text for the Component Description field.

   The package product description shows the component descriptions of each selected product. For ease of reference, we recommend making the component description the same name as the product option's configured SKU.

3. Enter text for the Component Description Position field.

   The package product description shows component descriptions if the product option's component description position matches a value in the configured description pattern. The pattern's value must be contained in brackets. For example, a product option with a component description position of 1 will appear in the same area as {1} in your configured description pattern.

   The configured description pattern field contains a text editor. You can add extra markup to the pattern like bulleted lists, formatting, and images.

4. Repeat steps 1 through 4 for the other product options in your bundle.
5. Return to your parent bundle product and edit its configured description pattern.

   The configured description pattern can be a combination of static text and bracketed tags.

Example: Your bundle contains four product features, and sales reps have to select one product option from each feature. You can make a straightforward package product description by giving each component description position a value equal to the order of the option's parent feature. Then, enter the following in your bundle product's configured description pattern.

This laptop bundle contains the following components.

- {1}
- {2}
- {3}
- {4}

Important: Package product descriptions are used only for configurations of the bundle product record where they were defined. You can't use them with product options created through a dynamic bundle feature.

MDQ Products

EDITIONS

Available in: Salesforce CPQ **Spring '15** and newer

You can show a product in the quote line editor as a single quote line with multiple segments. Each segment represents a block of time (quarter, month, year, or custom) and has a quantity and discounts independent of the other segments. This feature is useful if you're selling subscription products and services, because you don't have to add multiple quote lines for each segment.

You can apply discounts or uplifts to individual segments—for example, a start-up discount on the first year of a three-year service subscription. You can also adjust the quantities of each segment.

Add MDQ (multi-dimensional quoting) segments to a product by creating a price dimension in your product's Price Dimensions related list. The price dimension's type controls whether your segments appear by year, quarter, month, custom, or as a one-time segment. You can also control whether users can edit the cost, quantity, or discounts of segments, or whether the segments inherit editability of these fields from their parent product record.

After you create a dimension, Salesforce CPQ calculates the number of segments by considering the length of your quote's term. For example, a product with a monthly price dimension and a two-year term might have 24 segments.

To add a one-time charge, such as an installation fee, create a price dimension with a Type value of One-Time and set its unit price to a value of your choosing. The unit price overrides the product's Price Book value. The one-time fee appears to the left of your segmented values in the line editor.

Example: Your company sells generators and provides an installation service for $1000 and an annual generator service subscription for $500. You can use MDQ products to create a subscription product that handles the one-time fee and the subscription service together. Set up the Generator Service product as follows.

- Subscription Pricing: Fixed Price
- Subscription Term: 12
- List Unit Price: $500

Now that you've made the subscription product, you can use price dimensions to include both the subscription fee and the one-time installation fee. Since both parts of the service have distinct pricing requirements, you'll need to make two price dimensions: One for the one-time fee and another for the ongoing subscription. Go to the product's Price Dimensions related list and create a price dimension as follows.

- Dimension Name: Generator Installation
- Type: One-Time
- Unit Price: $500

Next, create another price dimension for the subscription service.

- Dimension Name: Yearly Service
- Type: Year

By default, the time-based price dimension draws its pricing and proration from the subscription product.

Guidelines for MDQ Products
Consider a few points before you create MDQ products.

MDQ Products in Quote Documents
Salesforce CPQ provides several methods for showing MDQ products in quote documents.

Guidelines for MDQ Products

Consider a few points before you create MDQ products.

EDITIONS

Available in: **All** CPQ Editions

Basic MDQ Guidelines

- MDQ products don't support usage pricing.
- You can't associate product options or configuration attributes with an MDQ product.
- Hovering over a segmented product in the quote line editor shows a dialog box with that segment's pricing details.
- If you have an MDQ product with multiple currencies (stored in separate price books), each currency needs its own price dimension. For example, if you have two price dimensions (Dimension A and Dimension B) and are using US dollars and euros, you need four separate dimensions (Dimension A: USD, Dimension A: EUR, Dimension B: USD, and Dimension B: EUR).

- If a quote's subscription term doesn't equal full-year terms, the quote line editor rounds it up when determining how many segments to create. So, the last three months of a 39-month subscription term are housed in "Year 4," with four total line items created. Then the price is prorated to match the 3-month term.
- You can place MDQ products in different quote line groups, even groups with different subscription terms.
- If you drag an MDQ product quote line, Salesforce CPQ moves all its segments, too.

Guidelines for MDQ Products and Bundles

- MDQ products can't be bundle parents.
- MDQ products aren't configurable. This also means that MDQ products can't have configuration attributes. You can associate a configuration attribute to a product with price dimensions, but you won't be able to access the product or the attribute in the configurator.
- A standard bundle parent can contain MDQ child options. Your bundle parent appears on the standard product table, while its MDQ child options appear in the segmented table. Quote lines for MDQ child options contain an icon indicating which of your quote's bundles it belongs to.
- A component MDQ product option's quantity is independent from the quantity of its bundle parent. You can edit the component's quantity in the quote line editor, and Salesforce CPQ doesn't multiply it by the parent's quantity like it would for non-MDQ product options.

Guidelines for Contracting MDQ Products

- When you contract an MDQ subscription product, Salesforce CPQ produces a subscription record for each of the product's segments on your quote. Each subscription's Subscription End Date field equals the last segment's end date. For example, let's say you had an MDQ product with the following segments.

Table 30: Quote Line

Segment	Start Date	End Date
Year One	01/01/2018	12/31/2018
Year Two	01/01/2019	12/31/2019
Year Three	01/01/2020	12/31/2020

Table 31: Subscription

Subscription	Subscription Start Date	Subscription End Date
Year One	01/01/2018	12/31/2020
Year Two	01/01/2019	12/31/2020
Year Three	01/01/2020	12/31/2020

MDQ Products in Quote Documents

Salesforce CPQ provides several methods for showing MDQ products in quote documents.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

[Make a Standard Template for MDQ Products](#)

Create a quote template that separates line items by segment dimensions. For example, a template containing several yearly MDQ products would show "Year 1" price dimensions in one group, even for different products. Non-segmented products appear at the end of the document. This layout is the default appearance for MDQ products in quote templates.

[Organize MDQ Products by Template Columns](#)

Show price dimensions organized by template columns within your org's quote documents.

Make a Standard Template for MDQ Products

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

Create a quote template that separates line items by segment dimensions. For example, a template containing several yearly MDQ products would show "Year 1" price dimensions in one group, even for different products. Non-segmented products appear at the end of the document. This layout is the default appearance for MDQ products in quote templates.

1. Create the template content that contains your line items.
   a. From your template content page, click **New**.
   b. Choose Line Items for your content type.
   c. Enter a content name.
   d. Choose Standard for your table style.
   e. Click **Save**.
2. Create a quote template.

   You can save time by cloning one of your existing templates and renaming it with an MDQ-specific title.
   a. In the Sections area, click **New Template Section**.
   b. Enter your section name.

      We recommend naming this section "Line Items."
   c. Enter a display order
   d. Choose Line Items for your content type.
   e. Click **Save**.

Organize MDQ Products by Template Columns

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

Show price dimensions organized by template columns within your org's quote documents.

1. Create the template content that contains your line items.
   a. From your template content page, click **New**.
   b. Choose Line Items for your content type.
   c. Enter a content name.
   d. Choose Price Dimensions as Columns for your table style.
   e. Click **Save**.
   f. If your quote document also contains non-segmented products, repeat steps A through F but choose Standard for your table style.
2. Create a quote template.

To save time, you can clone an existing quote template and rename it with an MDQ-related title.

3. In your quote template, click **New Template Section**.
4. Choose a section name.

   We recommend using a name that clearly states the template contains line items.
5. Enter a display order.
6. For the Content field, choose the template content you created in Step 1.
7. For the Group Field field, choose SBQQ__SegmentLabel__c.

   You may need to add SBQQ__SegmentLabel__c to Group Field first.
8. From your quote template, create line column records for each of the price dimension fields that you want your quote document for display. For example, you could create line columns for quantity, uplift, and net price.

   In order for your quote document to format properly, the first line column must always be Product Name.

   Click **Save**.
9. Create another template section if your quote contains non-MDQ products.
   a. From your quote template, click **New Template Section**.
   b. Choose the template content you created in Step
   c. For the Content field, choose the template content you created in Step 1.
   d. Enter a display order.
   e. Select **Print Quote Totals**.
   f. If you want to filter your table, enter `SBQQ__SegmentKey__c` as the filter field and `equals` as the filter operator.
   g. Click **Save**.

You can also create a quote template that displays price dimensions as summary rows. In this case, repeat the above steps 1 through 9, but use a table style of Price Dimensions as Rows With Summary for the template content that contains your MDQ products. This template also filters out non-MDQ products, so you'll still need to make another template content record if you have any standard products.

Subscription Products

Subscription products are services that run for a set period, such as a year-long support service. Salesforce CPQ automates pricing, prorating, and coterminating subscriptions on contracts and renewals.

EDITIONS

Available in: **All** CPQ Editions

Select your type of subscription product with the product field Subscription Pricing.

- Fixed Price: This product gets its list price from a price book entry.
- Percent of Total: This product's list price is a percentage of the quote, quote line group, or a bundle's total price.

Salesforce CPQ determines the length of a subscription by considering the value of the package setting Subscription Term Unit alongside a subscription product's Subscription Term. For example, you can set a yearly subscription by setting Subscription Term Unit to Month and your product's Subscription Term to 12. You can also set Subscription Term Unit to Day and your product's Subscription Term to 365.

Salesforce CPQ prorates subscription products against a quote's Subscription Term. For example, a 12-month subscription has its final price halved on a 6-month quote.

Percent of Total Pricing

Set a product's list price as a percentage of its parent quote, quote line group, or bundle total price. This feature is useful if you want to scale a product's price relative to another group of products or the quote itself.

Evergreen Subscriptions

Salesforce CPQ users can create contracts with subscriptions that don't have any end dates and, therefore, don't need to be renewed. This supports an open-ended term of service that allows for customers or providers to cancel or terminate the subscription at any point. Evergreen subscriptions provide the ability to quote, sell, and manage subscriptions products without an end date.

Percent of Total Pricing

EDITIONS

Available in: **All** CPQ Editions

Set a product's list price as a percentage of its parent quote, quote line group, or bundle total price. This feature is useful if you want to scale a product's price relative to another group of products or the quote itself.

For example, you can create a bundle containing software licenses and then a single product representing a yearly maintenance subscription. Your subscription cost increases as sales reps add more licenses to the bundle. To enable percent of total pricing on a subscription product, set its Subscription Pricing field to Percent of Total.

You can also add percent of total pricing to a one-time product by changing its Pricing Method field to Percent of Total.

Products contain several other fields that let you customize the percent of total price calculation process, but you need only the following fields for a basic setup.

Percent of Total Base

Define whether your Percent of Total product calculates its price based on the list price, net price, customer price, or regular price of its covered products. If you don't choose a value, calculations default to the list price.

Percent of Total (%)

A Percent of Total product's price is this percentage of the combined price of its covered products. Salesforce CPQ uses this product's percent of total base to determine the price field (such as list price, net price, or customer price) used in this calculation.

With this setup, a percent of total product covers all non-subscription products on the quote. So let's say your percent of total base targets list price, your percent of total (%) is 40, and your quote contains three non-subscription products with a combined list price of \$5000. In this case, your percent of total product would have a price of \$2000.

If your product has a value for its Percent of Total Target field, it ignores other products on your quote and uses only the targeted product's price for percent of total price calculation. The targeted product doesn't have to be on your quote.

If your percent of total product is a bundle component and you want to base its price on the bundle's net total, find the related product option record and set its Percent of Total Scope field. You can set this field so your percent of total product calculates based off the net total of the bundle parent, the bundle components, or the parent and components together. Salesforce CPQ then uses the rest of your percent of total fields to calculate the percent of total product's price.

By default, percent of total products don't cover fixed-price subscription products. You can include a fixed-price subscription product by selecting its Include in Percent of Total field.

Note: Percent of total products can't cover other percent of total products.

Subscribed Assets

When you contract a percent of total subscription product, Salesforce CPQ creates a subscribed asset record for each of the product's covered assets. When you renew your percent of total subscription product, Salesforce CPQ pulls all its covered assets into the renewal quote. Subscribed asset quote lines keep the same prices as their original quote lines, except for a net total of zero. This way, your percent of total subscription maintains its price on the renewal quote while the covered one-time products from the original quote don't add to the renewal quote's total.

Example: Your business offers an SLA maintenance package for generator installations. The package has a list price of $20,000. You want your maintenance package to set its price based on 15% of the net total of all generators included on the quote. Configure your maintenance package with the following field values.

- Product Name: SLA Silver
- Subscription Pricing: Percent of Total
- Percent of Total Base: List
- Percent of Total (%): 15

If the generators on your quote have a combined total price of $195,000, your maintenance package ends up with a total price of $29,250 after you add it to your quote.

Percent of Total Fields

Certain product fields let you customize how your Percent of Total product calculates its price based on its covered products. If you have a product that often serves as a covered product, you can use some of these fields to control how it affects the covering Percent of Total product. Your page layout and field-level security settings determine which fields are visible and editable on contracted price records.

EDITIONS

Available in: All Salesforce CPQ Editions

Percent of Total Fields

Find these fields in the Salesforce CPQ Subscriptions section of your Product record.

Exclude From Percent of Total

Salesforce doesn't use this product when calculating the price of a Percent of Total product on the same quote. Use this field only on a covered product.

Include In Percent of Total

By default, a percent of total product doesn't include fixed-price subscription products in its scope when calculating its price. Select this field on a fixed-price subscription product if you want to include it in price calculations for percent of total products. This field doesn't have any effect on non-subscription products.

Percent of Total (%)

A Percent of Total product's price is this percentage of the summed price of its covered products. Salesforce CPQ uses this product's percent of total base to determine the price field (such as list price, net price, or customer price) used in this calculation.

Percent of Total Base

Define whether your Percent of Total product calculates its price based on the list price, net price, customer price, or regular price of its covered products. If you don't choose a value, calculations default to the list price.

Percent of Total Category

A Percent of Total product with a category calculates its price based only on covered products with the same category. You can add any values to this picklist. For example, if you want a hardware maintenance Percent of Total product to cover only hardware products, set the Percent of Total Category to Hardware on the Percent of Total product and all your hardware products.

Percent of Total Constraint

Define whether your Percent of Total product limits its maximum or minimum calculated price to its own list price. This field is useful to account for quantities of covered products that are much larger or smaller than usual.

Percent of Total Target

Your Percent of Total product can calculate its price based off this product instead of any other product on your quote. This field is useful in situations where you don't want to base your Percent of Total product's price off its subscribed asset. For example, you have a warranty Percent of Total product that you want to cover a diesel electrical generator. However, the generator is $500,000, which is more than you want to use in calculating the warranty's price. You can instead create a "Covered Generator" product for $2,000 and assign that as your warranty's Percent of Total target. This lets you provide a reasonable price for your warranty while still including the generator itself as your warranty's subscribed asset for renewals.

Use Percent of Total Products in a Bundle

EDITIONS

Available in: All Salesforce CPQ Editions

You can define a product option as a Percent of Total product. This setup is useful when your Percent of Total product is part of a larger package, such as an IT service bundle that contains hardware, software, and a hardware warranty. It also lets you limit your covered products to the bundle instead of your entire quote.

If your product option is related to a Percent of Total product record, use the Percent of Total Scope field to determine what your Percent of Total product covers. All of these values exclude other percent of total products.

Package

Covers only the bundle parent

Components

Covers only other options on the same level

Both

Covers the bundle parent, and other options on the same level.

Hierarchy

Covers the entire bundle configuration, including all parent and child bundles.

- Package: This product option covers only the bundle parent.
- Components: This product option covers only other options on the same level.
- Both: This product option covers the bundle parent, and other options on the same level.

1. From your bundle product, create a new product option record.
2. Set your product option's Configured SKU field to your Percent of Total product record.
3. Provide a value for the product option's Percent of Total Scope field.

Example: Your company sells an appliance bundle with child bundles for gold support and silver support respectively. Each child bundle contains a mix of hardware and software product options, as well as a hardware warranty Percent of Total product and a software warranty Percent of Total product. Each type of warranty covers only the same type of product options within the bundle. You can set up this bundle by using Percent of Total products as product options alongside the Percent of Total Category field.

1. Create all your warranty products and set their Subscription Pricing fields to Percent of Total.
2. Add the gold warranties as product options in your gold bundle, and the silver warranties as product options in your silver bundle.
3. Set the Percent of Total Scope field on all your warranties to Components.
4. Add Hardware and Software values to the Percent of Total Category field on your product object.
5. Set the Percent of Total Category field on all your hardware products, including the warranties, to Hardware.
6. Set the Percent of Total Category field on all your software products, including the warranties, to Software.

Allow Percent of Total Coverage for Net-New Products

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

Change your package-level settings so that Percent of Total products cover net-new products on an amendment quote or renewal quote. By default, Percent of Total products don't extend their coverage to new products that your sales reps add to either of these quote types.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Select Configure next to Salesforce CPQ.
3. Click the Subscriptions and Renewals tab.
4. Select **Include Net-new Products in Maintenance**, and then save your changes.

   When sales reps contract a Percent of Total product that contains a net-new line and an original line for a covered product, Salesforce CPQ creates two unique subscribed asset records.

Percent of Total Guidelines

EDITIONS

Available in: All CPQ Editions

Consider key guidelines when you're setting up a percent of total product.

Discounts

Salesforce CPQ doesn't apply discounts derived from the quote's Target Customer Amount field onto Percent of Total products that have the Non-Discountable field selected.

When you add to a quote a percent of total product that has a contracted percent (%) discount, Salesforce CPQ stores the percentage discount value on the quote line's Special Price field.

Renewals & Amendments

You can't reduce the quantity of subscribed assets on a renewal quote. Use amendments to reduce the quantity of your subscribed assets or assets instead.

Salesforce CPQ doesn't support the Percent of Total Constraint field on amendment quotes.

When you renew or amend a contract, your original quote's percent of total subscriptions continue to cover their asset quote lines on the renewal or amendment quote. The renewal or amendment subscription still covers assets even if you changed a field on the asset product records that would exclude them from the subscription's scope. For example, your renewal or amendment subscription would still cover assets (that it covered on the original quote) if the assets had an active Exclude from Percent of Total field.

You can use a few more fields to further customize your percent of total products.

- Percent of Total Constraint changes your percent of total product's price to its original list price if its percent of total calculation creates a price above or below that original list price. This feature is useful if you don't want your percent of total product to fall outside its list price in nonstandard settings. For example, you might have one quote where a customer orders many products that are used as the percent of total target.
- Salesforce CPQ considers all non-subscription products and excludes all subscription products when calculating a percent of total product that looks up to the entire quote. You can select **Exclude From Percent of Total** to exclude a non-subscription product from all percent of total calculations. And you can select **Include In Percent of Total** to include a subscription product in all percent of total calculations.
- When a Percent of Total product is added to a quote that contains quote line groups, the Percent of Total Scope Column appears in the line editor. Users can choose whether the Percent of Total Calculation includes all quote lines on the quote or only quote lines that the Percent of Total product has been added to.

Evergreen Subscriptions

Salesforce CPQ users can create contracts with subscriptions that don't have any end dates and, therefore, don't need to be renewed. This supports an open-ended term of service that allows for customers or providers to cancel or terminate the subscription at any point. Evergreen subscriptions provide the ability to quote, sell, and manage subscriptions products without an end date.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

Setting Up Your Evergreen Subscriptions

To set up evergreen subscriptions, follow these steps.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

Setting Up Evergreen Subscriptions

To enable evergreen subscriptions, you must first Configure Salesforce CPQ Package Settings on page 42.

Navigate to **Subscriptions and Renewals** and then select **Enable Evergreen Subscriptions**. Save your changes.

If you are an existing Salesforce CPQ user, manually add the new picklist values to the Subscription Type field on the product:

- Evergreen
- Renewable/Evergreen

The picklist values are automatically added to the Subscription Type field for new Salesforce CPQ users.

To add the evergreen checkbox to your contract page layout, find the page layout for contracts.

- If you're using Lightning Experience, from Setup, in the Quick Find box, enter `Object Manager`, and then select Object Manager. Next, click **Contract**, and then scroll to the **Page Layouts** section.
- If you're using Salesforce Classic, from Setup, in the Quick Find box, enter `Contract`, and then select **Page Layouts**.

Next to CPQ Contract Layout, click **Edit**. From the top panel, enter `Evergreen` into the Quick Find box. Drag the field to an empty section, then save your changes.

Other Set Up Considerations

To enable entitlements, service cloud, or service contracts, contact your admin to remove the Master Evergreen Contract field on your quote and replace it with the Master Evergreen Service Contract field.

On page layouts, the contract or service contract layout can be updated to reflect that the month's term is not a required field for the page. Admins can update the page layout or create a different record type for evergreen contracts.

For easier field management, consider creating a separate page layout for evergreen contracts. For example, the Contract Term field is usually a required field for contracts, but is irrelevant to the evergreen scenario.

Set Up an Evergreen Product

There are two types of evergreen products. If the Subscription Type field value is Evergreen, the product is set up to continue without an end date. The Renewable/Evergreen picklist value allows for a product to be evergreen with the option of switching to a renewable subscription. The account executive or sales rep determines whether the subscription type continues being evergreen at another point.

To set up an evergreen product:

1. Navigate to the products page and click **New**. Select **Evergreen** or **Renewable/Evergreen** in the Subscription Type field. Make sure to add your products to a pricebook.
2. Under subscription pricing, enter `Fixed Price`. Activate the product.
3. Navigate to the related page and go to the price books related list. Click **Add Standard Price**, enter the price of your subscription into the List Price field, then save your changes. This field is the price for your service.
4. Navigate to the price book related list. Click **Add to Price Book**. Select your pricebook from the pricebook picklist, set a currency, then save your changes.

Quote and Manage Evergreen Subscriptions

You can manage your evergreen products and subscriptions to better report and track your evergreen business.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

Quote Your Evergreen Products

As a best practice, we recommend creating an order from the quote and creating the contract from the order. Make sure your quote's Contracting Method field is set to By Subscription End Date.

If your product's subscription type is Evergreen, then the only available option on the quote line's subscription type is Evergreen. If your product's subscription type is Renewable/Evergreen, then the quote line's subscription type defaults to Evergreen but can be manually set to Renewable if needed.

To add your evergreen products to the quote lines, select the products and set the Subscription Type picklist values to `Evergreen` or `Renewable` depending on the product's subscription type. Save your changes.

Evergreen products don't have end dates. The subscription term is set to 1 on the quote line so that users have the monthly unit price for forecasting purposes. The renewable contract has end dates, terms, and an option to renew.

Manage Order Products and Subscriptions

When working with your order products and subscriptions, consider the following.

- Evergreen subscriptions are managed on their own contract. As such, evergreen and non-evergreen subscriptions can't be on the same contract.
- If there are evergreen and non-evergreen subscriptions on the same quote, the contracting method can't be Single Contract.
- The booking indicator is set to false on the order product so that evergreen order products are excluded from revenue considerations downstream.

Example: Your company offers two different types of gym memberships. The first membership is an evergreen subscription that renews on a month-to-month basis. Customers sign up once and continue their memberships indefinitely or until one side cancels the service. The second membership is a renewable/evergreen subscription, which is set up during quoting as a renewable subscription. Customers agree to pay for a one year membership upfront and decide at the end of the year whether they want to continue their one year membership (renewable) or switch to a month-to-month membership (evergreen).

Evergreen Subscription Fields

Your page layout and field-level security settings determine which fields are visible and editable on your contracted subscriptions.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

Evergreen Subscriptions Fields

These are the evergreen subscription fields.

Master Evergreen Contract
Determines which evergreen contract is tied to the quote. This field is found on your quote record and only applies to Salesforce CPQ for Sales Cloud.

Master Evergreen Service Contract
Determines which evergreen service contract is tied to the quote. This field is found on your quote record and only applies to Salesforce CPQ for Service Cloud.

Evergreen
Indicates if the contract is evergreen or not. The field is included in Service Cloud and functions the same. This field can be found on your contract or service contract.

Renewable/Evergreen and Evergreen Values on Subscription Type
These values determine whether the product is renewable and has the option of being evergreen during the quoting process. These values are found on multiple objects.

Product Subscription Type
The quote line's default subscription type. This field is found on multiple objects. By default, this value is mapped from the product. Keep in mind that the quote line maps from the product and that any specific objects map from the quote line. For any legacy quote lines, this field is null. Admins are responsible for setting up the proper page layout.

Subscription Type
Determines the contract's pricing process. This field is found on multiple objects. By default, this value is mapped from the product. Keep in mind that the quote line maps from the product and that any specific objects map from the quote line. For any legacy quote lines, this field is null. For new quote lines, the value is conditionally mapped from the Default Subscription Type field and picklist values are eliminated if they're not valid choices. Admins are responsible for setting up the proper page layout. The conditional picklist values are:

Product Subscription Type	Available Subscription Type
One-Time	One-Time
Renewable	Renewable
Renewable/Evergreen	Renewable Evergreen
Evergreen	Evergreen

Guidelines for Evergreen Subscriptions

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

When working with evergreen subscriptions in Salesforce CPQ, consider the following.

Evergreen subscriptions don't support:

- Any package of Salesforce Billing. As such, we do not allow invoicing on evergreen order products.
- All Usage-Based Products.
- The ability to partially amend a subscription. Evergreen subscriptions support only canceling or swapping subscriptions.
- A mixture of non-evergreen subscriptions in bundles. The bundle must be all evergreen or non-evergreen subscriptions.
- Dynamic bundles with evergreen products.
- Renewals for asset-based models.

Evergreen and non-evergreen subscriptions aren't allowed on the same contract. If you have a quote with evergreen and non-evergreen quote lines, you can't use the Single Contract contracting method.

Evergreen contracts can't be renewed.

For partial orders, the contract method must be Contract Separately or By Subscription End Date.

Non-evergreen percent of total can't cover evergreen subscriptions. Similarly, evergreen percent of total can't cover non-evergreen subscriptions.

Usage-Based Products (Beta)

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

Quote and price your products based on predefined rates for future consumption of the product or service you're selling. The price scales alongside usage, reducing initial purchase barriers and driving higher revenue. You can configure your units of usage and setup different pricing rates based on usage volume.

Note: As a beta feature, usage-based pricing is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Usage-Based Pricing in the IdeaExchange and through the Trailblazer Community. For information about enabling this feature in your organization, contact Salesforce.

Important: For now, usage-based pricing is available only in Salesforce. Usage-based pricing doesn't support Salesforce CPQ or Salesforce Billing managed package features.

All usage products require an active standard price. After you've created your usage product, you can associate it with one or more usage rates.

Defining Usage Product Price Rates (Beta)

All usage products require at least one consumption rate. The rate sets a quantity-based boundary for usage and defines how much your product costs when its usage falls within that boundary. Consumption rates price usage at a per-unit fee or a flat fee across the entire range of usage.

Create a Basic Usage Pricing Setup (Beta)

Create a consumption schedule with one consumption rate, then link it to a usage product.

Usage Pricing Guidelines (Beta)

When you're setting up usage pricing for your products, consider key guidelines.

Use Cases for Usage-Based Pricing (Beta)

Usage-based pricing lets you configure many types of tier-driven usage rates for your products. When you're working with usage products, review important use cases and common ways to set up usage pricing.

Defining Usage Product Price Rates (Beta)

All usage products require at least one consumption rate. The rate sets a quantity-based boundary for usage and defines how much your product costs when its usage falls within that boundary. Consumption rates price usage at a per-unit fee or a flat fee across the entire range of usage.

EDITIONS

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Important: For now, usage-based pricing is available only in Salesforce. Usage-based pricing doesn't support Salesforce CPQ or Salesforce Billing managed package features.

Salesforce uses consumption schedules to group consumption rates. Your consumption schedule defines the unit of measurement and rating method for all of the schedule's rates. It also defines the billing frequency that Salesforce Billing will use to invoice this product.

You can create several rates on a schedule to represent increasing usage quantity boundaries with different prices. Here's a sample set of rates that decreases the per-unit cost as customers use more of the product.

- Rate 1: 1-250 units at $0.50 per unit
- Rate 2: 251-500 units at $0.40 per unit
- Rate 3: 501-750 units at $0.30 per unit

For consumption schedules with several rates, the schedule's Type field defines how to price quantities of usage based on where they fall within each rate's boundaries.

- Range: The schedule prices usage using only the rate that contains the usage quantity.
- Slab: The schedule prices quantities of usage based on where it falls within the boundaries of each rate.

So, let's say you have two rates — one with a per-unit price of $0.50 for 1-50 units, and another with a per-unit price of $0.40 for 51 units or more. Your customer loads 60 units of usage.

- Range: The 60 units fall in the second rate's boundaries, so the usage has a price of ($0.40 * 60) = $24.00.
- Slab: The first 50 units fall in the first rate's boundaries, and the next 10 units fall in the second rate's boundaries. The usage has a price of ($0.50 * 50) + ($0.40 *10) = $29.00.

Create a Basic Usage Pricing Setup (Beta)

Create a consumption schedule with one consumption rate, then link it to a usage product.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

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Important: For now, usage-based pricing is available only in Salesforce. Usage-based pricing doesn't support Salesforce CPQ or Salesforce Billing managed package features.

1. Create a product for usage pricing.
   a. From the product object, click **New**.
   b. Define an active standard price for your product.
2. Create a consumption schedule.
   a. From the consumption schedule object, click **New**.
   b. Give your consumption schedule an easily recognizable name.
   c. Give your consumption schedule a unit of measure. Usage quantities and rates use this value. For example, if your usage product is a server monitoring program that charges by hours of uptime, you could use a value of Hour.
   d. Choose a rating method for your consumption schedule.
   e. The Type field lets you control how Salesforce prices usage products based on your rating method. Choose Range or Slab.
   f. Choose a billing term and billing term unit. When a sales rep orders the usage product associated with this schedule, Salesforce Billing uses these values to calculate the resulting billing frequency.
3. Create consumption rates.
   a. From the consumption schedule that you made in Step 1, go to the Consumption Rates related list and click **New**.

   b. Give your consumption rate a processing order. If your schedule has multiple rates, Salesforce evaluates the rate with the lowest number first.
   c. Choose a pricing method for your rate. A Per Unit method applies this rate's price to each unit of usage. A Flat Fee method applies this rate's price to the entire range of usage that falls within this rate's bounds. For example, let's say your usage product has 50 units of usage and a consumption rate with a $50 price.
      - Per Unit: $50 * 50 = $2500
      - Flat Fee: $50

4. On your consumption schedule, select **Active**.

   Consumption schedules require at least one consumption rate before activation.

5. Link your consumption schedule to a product.
   a. From your consumption schedule, go to the Product Consumption Schedules list and click **New**.
   b. In the product field, provide a lookup to the product that you want this consumption schedule to cover.
   c. You can also link a consumption schedule by going to your usage product's Product Consumption Schedule related list, clicking **New**, and providing a lookup to an active consumption schedule.

Usage Pricing Guidelines (Beta)

When you're setting up usage pricing for your products, consider key guidelines.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

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Important: For now, usage-based pricing is available only in Salesforce. Usage-based pricing doesn't support Salesforce CPQ or Salesforce Billing managed package features.

- You can use the product consumption schedule object to associate multiple consumption schedules to the same product. However, each of these consumption schedules must have unique units of measure and matching attributes.
- Consumption rate billing terms must be greater than or equal to one month.
- Consumption rate billing terms must be less than or equal five years or 60 months.
- When you're using multiple rates on a schedule, a rate's lower bound must be exactly one above the previous rate's upper bound.
- All of a schedule's consumption rates must have unique usage processing orders.

Use Cases for Usage-Based Pricing (Beta)

Usage-based pricing lets you configure many types of tier-driven usage rates for your products. When you're working with usage products, review important use cases and common ways to set up usage pricing.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

Note: As a beta feature, usage-based pricing is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Usage-Based Pricing in the IdeaExchange and through the Trailblazer Community. For information about enabling this feature in your organization, contact Salesforce.

Important: For now, usage-based pricing is available only in Salesforce. Usage-based pricing doesn't support Salesforce CPQ or Salesforce Billing managed package features.

Use Pricing Use Case: Shared Consumption Schedules (Beta)

If two products share the exact same type of usage pricing, you can create one consumption schedule and associate it with both products through unique junction objects.

Usage Pricing Use Case 2: Usage Pricing for Scaled Services (Beta)

Many vendors sell packages with usage rates that vary based on the type of usage that the consumer uploads — for example, audio processing with different rates for standard-definition or high-definition content. In this case, you can create different consumption schedules for the types of usage and associate both of them with your usage product.

Use Pricing Use Case: Shared Consumption Schedules (Beta)

If two products share the exact same type of usage pricing, you can create one consumption schedule and associate it with both products through unique junction objects.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

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Important: For now, usage-based pricing is available only in Salesforce. Usage-based pricing doesn't support Salesforce CPQ or Salesforce Billing managed package features.

Your company sells data plans for both smartphones and smartphone simcards. Each plan sells as a free product with usage-based pricing for data, minutes, and text.

Product	Product Price	Data Usage	Minutes	Texting
Phone Dataplan	$0 / month	500 MB / month free, then $1 / MB	200 minutes / month free, then $0.50 / minute	500 messages / month free, then $1 / message
Simcard Dataplan	$0 / month	200 MB / month free, then $0.50 / MB	200 minutes / month free, then $0.50 / minute	500 messages / month free, then $1 / message

Since the plans share usage pricing for minutes and texting, we can create two consumption schedules and use the product consumption schedule to assign them both to the phone dataplan and simcard dataplan. However, since the plans have different data usage rates, they each require their own data consumption schedule.

Consumption Schedule: Phone Data Usage

Unit of Measure: MB

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Processing Order: 1
- Pricing Method: Flat Fee
- Lower Bound: 0
- Upper Bound: 500
- Price: $0

Consumption Rate 2

- Processing Order: 2
- Pricing Method: Per Unit
- Lower Bound: 501
- Upper Bound: Null
- Price: $1

Product Consumption Schedule

- Product: Phone Dataplan

Consumption Schedule: Simcard Data Usage

Unit of Measure: MB

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Processing Order: 1
- Pricing Method: Flat Fee
- Lower Bound: 0
- Upper Bound: 200

- Price: $0

Consumption Rate 2

- Processing Order: 2
- Pricing Method: Per Unit
- Lower Bound: 201
- Upper Bound: Null
- Price: $0.50

Product Consumption Schedule

- Product: Simcard Dataplan

Consumption Schedule: Minutes

Unit of Measure: Minutes

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Processing Order: 1
- Pricing Method: Flat Fee
- Lower Bound: 0
- Upper Bound: 200
- Price: $0

Consumption Rate 2

- Processing Order: 2
- Pricing Method: Per Unit
- Lower Bound: 201
- Upper Bound: Null
- Price: $0.50

Product Consumption Schedule 1

- Product: Phone Dataplan

Product Consumption Schedule 2

- Product: Simcard Dataplan

Consumption Schedule: Messaging

Unit of Measure: Messagers

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Processing Order: 1
- Pricing Method: Flat Fee
- Lower Bound: 0
- Upper Bound: 500
- Price: $0

Consumption Rate 2

- Processing Order: 2
- Pricing Method: Per Unit
- Lower Bound: 501
- Upper Bound: Null
- Price: $1

Product Consumption Schedule 1

- Product: Phone Dataplan

Product Consumption Schedule 2

- Product: Simcard Dataplan

Usage Pricing Use Case 2: Usage Pricing for Scaled Services (Beta)

Many vendors sell packages with usage rates that vary based on the type of usage that the consumer uploads — for example, audio processing with different rates for standard-definition or high-definition content. In this case, you can create different consumption schedules for the types of usage and associate both of them with your usage product.

EDITIONS

Available in: Salesforce CPQ Winter '19 and later

Note: As a beta feature, usage-based pricing is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Usage-Based Pricing in the IdeaExchange and through the Trailblazer Community. For information about enabling this feature in your organization, contact Salesforce.

Important: For now, usage-based pricing is available only in Salesforce. Usage-based pricing doesn't support Salesforce CPQ or Salesforce Billing managed package features.

Your company sells audio processing service packages. Each package is a product with a recurring fee and included amounts of audio processing based on hours of HD or SD content. If a customer goes above the included hours, they're charged an extra rate for each extra hour. The premium audio processing package contains twice the level of included usage and cheaper overage rates.

For this use case, we can create two products to represent the economy package and the premium package. Each package is related to two consumption schedules that represent the package's HD and SD usage rates, so we'll have four unique consumption schedules in total.

Each usage rate contains a default amount of free available usage. For each consumption schedule, we can represent that as a consumption rate with a flat fee of zero and bounds from 0 to the maximum free usage value.

Product	Product Price	SD Content	HD Content
Economy Package	$2000 / month	1000 hours free, then $0.50 / hour	800 hours free, then $0.40 / hour

Product	Product Price	SD Content	HD Content
Premium Package	$5000 / month	2000 hours free, then $0.40 / hour	1600 hours free, then $0.30 / hour

Consumption Schedule: SD Audio Processing - Economy

Unit of Measure: Hour

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Lower Bound: 1
- Upper Bound: 1000
- Price: $0
- Pricing Method: Flat Fee
- Processing Order: 1

Consumption Rate 2

- Lower Bound: 1001
- Upper Bound: Null
- Pricing Method: Per Unit
- Processing Order: 2
- Price: $0.50

Product Consumption Schedule:

- Product: Management Plan - Economy

Consumption Schedule: HD Audio Processing: Economy

Unit of Measure: Hour

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Processing Order: 1
- Pricing Method: Flat Fee
- Lower Bound: 0
- Upper Bound: 800
- Price: $0

Consumption Rate 2

- Processing Order: 2
- Pricing Method: Per Unit
- Lower Bound: 801
- Upper Bound: Null
- Price: $0.40

Product Consumption Schedule

- Product: Management Plan - Economy

Consumption Schedule: SD Audio Processing - Premium

Unit of Measure: Hour

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Lower Bound: 1
- Upper Bound: 2000
- Price: $0
- Pricing Method: Flat Fee
- Processing Order: 1

Consumption Rate 2

- Lower Bound: 2001
- Upper Bound: Null
- Pricing Method: Per Unit
- Processing Order: 2
- Price: $0.40

Product Consumption Schedule:

- Product: Management Plan - Premium

Consumption Schedule: HD Audio Processing: Premium

Unit of Measure: Hour

Rating Method: Tier

Type: Slab

Consumption Rate 1

- Processing Order: 1
- Pricing Method: Flat Fee
- Lower Bound: 0
- Upper Bound: 1600
- Price: $0

Consumption Rate 2

- Processing Order: 2
- Pricing Method: Per Unit
- Lower Bound: 1601
- Upper Bound: Null
- Price: $0.30

Product Consumption Schedule

- Product: Management Plan - Premium

Add Images to Product Records

Use a formula field to associate an internal or external image with a product record. You can then show this image in product search results, quote documents, or the quote line editor. Images help your sales reps provide examples to customers during the quote development process.

In Salesforce CPQ Winter '17 and later, you have to define image height and width in any image formulas used in the quote line editor.

EDITIONS

Available in: All Salesforce CPQ Editions

1. From the object management settings for products, go to Custom Fields & Relationships and then click **New**.
2. Create a formula field that outputs text. We recommend naming it Product_Image_Link__c.

   Salesforce CPQ sets your field's API name to Product_Image_Link__c.
3. Add one of the following formulas to your field.
   a. For external images, use `Image(Product_Image_Link__c , "" , 32,32)`. If you picked a different field name in step 3, replace`Product_Image_Link__c` with that field's API name.

      `32,32` represents the size of the image in pixels. You can replace with a different size, but we recommend this size so that the image doesn't take up too much space on your record.
   b. For internal images, use `IMAGE("sample_url"+Product_Image_Link__c , "" , 32,32` and replace `sample_url` with the URL for your image. If you picked a different field name in step 3, replace `Product_Image_Link__c` with that field's API name.
4. Save your product image field.
5. From Setup, in the Quick Find box, enter *`Products`*, select **Search Layouts**, and then select **Edit** next to Search Results.
6. Add your field from Step 3 to Selected Fields.
7. Edit your Product object's layout to contain the field you made in Step 3.
8. In the product record that you want to show your image, edit your product image field to contain one of the following values.
   a. If you're using an external image, use the image's URL.
   b. If you're using an internal image, use the image's Salesforce ID.

Product Pricing Methods

Apply various discounts or markups to customize pricing on your products.

EDITIONS

Available in: **All** CPQ Editions

Contracted Pricing

When sales reps create a contract, they can use quote line prices from their original quote on future quotes within that contract's account. This process, known as contracted pricing, is useful when your sales reps have negotiated a price for a product and want to continue using that price after making a contract. Salesforce CPQ uses the negotiated price on new quotes, renewal quotes, and amendment quotes.

Guidelines for the Effective Quantity Field

The quote line's effective quantity field represents the actual quantity that Salesforce uses while calculating prices for that quote line. For some objects, such as amended quote lines and quote lines from slab-discounted or block-priced products, the effective quantity has a different value than the quantity.

Allow Users to Define Custom Product Pricing

Give your sales reps more control and flexibility around product prices. For each product record where you want to enable custom pricing, you can allow sales reps to either define their own price or select a pricing method. Then, reps can do things like set product prices outside of standard discount and markup fields.

Product Pricing Overview

EDITIONS

Available in: All Salesforce CPQ editions.

Salesforce CPQ provides several types of discounts that sales reps can apply to their quote lines.

The list price is the quote line's initial price. When you quote a product, Salesforce CPQ pulls the quote line's list price from the product's list price entry in your price book. You can also override the list price by entering a value in the quote line's Price Editable field. Product records have a Pricing Method field set to List by default, but you can change that to Cost or Block pricing if needed.

Salesforce CPQ uses following to steps to calculate the net price for a quote line. We've started with a sample quote line using a $100 list price.

Price	Action	Value
List Price		$100.00
- System Discounts	Discount Schedules	10%
Regular Price	The special price or the contracted price goes into the regular price	$90.00
- Additional Discount	Manually entered by sales rep	20%
Customer Price		$72.00
- Partner Discount		10%
Partner Price		$64.80
- Distributor Discount		10%
Net Price	Goes into Pipeline/Forecast Amount	$58.32

Block Pricing

EDITIONS

Available in: **All** CPQ Editions

You can price a product based on several different quantity ranges, called block prices. When a sales rep adds that product to a quote, Salesforce CPQ checks where it falls in the quantity ranges and prices the quote line accordingly.

Block pricing is useful when you sell products by packs or groups of various quantities and want to represent the pack as a single quote line. For example, a pack of one to 10 units costs $10, while a pack of 11–20 units costs $18. Sales reps can also use decreasing per-unit costs toward the end of each range as a selling incentive.

To set up block pricing, set your product's pricing method to Block. Then click **New Block Price** in your product's Block Prices related list and create one block price record for each quantity range. Block prices use the following important fields.

Lower Bound

The lowest quantity for this quantity range.

Upper Bound

The highest quantity for this quantity range. This value is not inclusive — for example, a block price range of one through five requires an upper bound of six.

A block price's upper bound and the next block price's lower bound must be the same.

If this is the last of a product's block prices and its upper bound is blank, Salesforce CPQ treats the upper bound as infinite.

Price

The price for this quantity range.

When a sales rep searches for a block-priced product, Salesforce CPQ shows its standard price on the Add Products page. However, when they add it to a quote, Salesforce CPQ evaluates its quantity and uses the appropriate block price for the quote line's list unit price. They can then apply discounts as needed.

After you create your block prices, you can edit them all on one page by clicking **Edit All** on the Block Prices related list.

Important: If your last block price has an upper bound and a sales rep enters a higher quantity, Salesforce CPQ prevents them from saving the quote.

Example: You sell small business MDM subscription licenses and charge by license packs of $100 for one to five licenses, $150 for six to 10 licenses, and $200 for 11 or more licenses. Let's see how you could set up block pricing on your MDM license's product record.

Name	Lower Bound	Upper Bound	Price
Block 1	1	6	$100
Block 2	6	11	$150
Block 3	11		$200

Cost-and-Markup Pricing

EDITIONS

Available in: **All** CPQ Editions

Set a price based on its cost plus a markup amount, rather than list price and discount.

Cost pricing is useful in these scenarios.

- You're selling to a partner. In this case, the customer is buying at a cost from you, applying a markup and then upselling to a distributor.

- You're selling a commodity with a variable price. In this case, you probably want to charge a predetermined cost and set a static markup. That way, you're charging a certain value regardless of variations in your product's list price.

To set up cost pricing on a product, set its Pricing Method field to Cost. You can then add cost values by currency in the Costs related list.

Batch Pricing

EDITIONS

Available in: **All** CPQ Editions

Price your component and accessory bundle options by static amounts based on quantity ranges.

If you have the Batch Quantity field in your product page layout, you can set batch pricing in your product's Batch Quantity field. Then change it anytime as needed.

When a user enters a quantity for a batch-priced product on the edit lines page, Salesforce CPQ calculates the line's price by:

1. Dividing the entered quantity by batch quantity
2. Rounding up to a whole number
3. Multiplying by the product's price

Example: Your Batch Quantity field is 32, and your product option's price is $10, so an order of 98 products costs $40. A quantity range moves to the next pricing level at one product over the maximum amount of the current level. In this case:

- 1–32 items: $10
- 33–64 items: $20
- 65–96 items: $30
- 97–128 items: $40
- And so on

Contracted Pricing

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

When sales reps create a contract, they can use quote line prices from their original quote on future quotes within that contract's account. This process, known as contracted pricing, is useful when your sales reps have negotiated a price for a product and want to continue using that price after making a contract. Salesforce CPQ uses the negotiated price on new quotes, renewal quotes, and amendment quotes.

Let's say that a sales rep negotiates a price of $3000 for a laptop with an original price of $4000. The $3000 price appears as the quote line's net unit price after the rep has applied the discounts. When they contract that quote's order or opportunity, if contracted pricing is enabled, future quotes for the account show the laptop's price before discounts as $3000.

Salesforce CPQ applies contracted prices only after you add a product to a quote. Editing a contracted price and then recalculating your quote doesn't pull in the edited values.

During quote line price calculation, Salesforce CPQ checks whether your quote line has a contracted price. If it does, Salesforce CPQ passes that price to your quote line's special price. It then updates the quote line's Special Price Type field to Contracted Price.

Tip: You may have only one contracted price record per currency per product. Assigning another contracted price to a product and then contracting that product causes the contracting process to fail. Therefore, we recommend that users who want to automatically generate contracted prices choose **Yes** for the Generate Contracted Price field on only their quote records. Setting that field to **Yes** on product records causes Salesforce CPQ to calculate a new contracted price every time you contract that product, which can cause an error.

Contracted Price Inheritance

Contracted prices inherit the prices of their parent accounts, unless a related account has different contracted prices from its own parent. To prevent an account from applying parent contracted prices to a subset of its related products, create a contracted price with an additional discount set to `0`. Contracted prices defined on an account always override contracted prices that would be passed on from the account's parents.

To prevent an account from applying parent contracted prices to all of its related products, select the account's **Ignore Parent Contracted Prices** field.

When conflicts exist among the inherited contracted prices, the contracted price for the immediate parent overrides any other contracted price farther up in the family.

Automatically Create Contracted Prices

Configure a quote so that when a sales rep contracts the quote's opportunity or order, contracted prices for all the quote's products are created.

Manually Define Contracted Prices

Define a contracted price record and associate it with a product. This process is useful if you're uploading records from an external system where you've already negotiated for a contracted price. This way, you don't have contract a quote first to establish the contracted price for your account's future quotes. You can also use filters to assign the contracted price to groups of items, or apply the contracted price only on certain dates.

Contracted Price Fields

Contracted prices allow you to negotiate a price for a product and then use that price on future quotes within the same account. Your page layout and field-level security settings determine which fields are visible and editable on contracted price records.

Automatically Create Contracted Prices

Configure a quote so that when a sales rep contracts the quote's opportunity or order, contracted prices for all the quote's products are created.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

1. From a quote, select a value for the Generate Contracted Price field.
   - **Price**: The contracted price has a price field equal to the net unit total for this product's quote line. All future quote lines for this product on this account use this price as their initial price.
   - **Discount Schedule**: The contracted price doesn't provide a value for the Price field. Instead, the contracted price record inherits the quote line's discount schedule. All future quote lines for this product on this account receive prices based on this discount schedule.
   - **Do Not Generate**: Salesforce CPQ doesn't create a contracted price for this product.
2. Save your quote record.
   When you contract your quote, Salesforce CPQ creates a Contracted Price record in your account for every product on your quote. The contracted price is based on the value in the Generate Contracted Price field. If your product contains multiple currencies, Salesforce CPQ creates a contracted price record for each currency.

Manually Define Contracted Prices

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

Define a contracted price record and associate it with a product. This process is useful if you're uploading records from an external system where you've already negotiated for a contracted price. This way, you don't have contract a quote first to establish the contracted price for your account's future quotes. You can also use filters to assign the contracted price to groups of items, or apply the contracted price only on certain dates.

1. From your account, find the Contracted Price related list and click **New Contracted Price**.
2. Set up the pricing information for the contracted price. You have 2 options.
   a. If the contracted price should have a static value, enter a value in the Price field.
   b. If the contracted price should base its value off a discount schedule, use the Discount Schedule field to find the appropriate discount schedule record.
3. If you want to apply the contracted price during certain dates, enter values in the Effective Date and Expiration Date fields.
4. If you want to apply the contracted price to several products, specify the filter criteria. For example, you might want to apply the contracted price to all products in the Data Security.

Example: Your company sells a server management package for $5000. A sales rep recently agreed to a price of $4000 for all packages sold to their customer between January 01, 2018, and April 01, 2018. Create a contracted price record with the following information.

- Product: Server Management Package
- Price: $4000
- Effective Date: 01/01/2018
- Expiration Date: 04/01/2018

Contracted Price Fields

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

Contracted prices allow you to negotiate a price for a product and then use that price on future quotes within the same account. Your page layout and field-level security settings determine which fields are visible and editable on contracted price records.

Contracted Price Fields

Contract

If you auto-generated the contracted price, this field refers to the contract related to the quote. This allows users to quickly find the contract that established the contracted price.

Discount

The discount percentage that your sales rep negotiated with their customer. During quote line price calculation, this value overrides the quote line's list unit price. You can set either a price or a discount on a contracted price record, but not both.

Discount Schedule

If you generated a contracted price from a product that has a discount schedule, then this field refers to the discount schedule on the product record. If you manually created the contracted price, you can define the discount schedule on the contracted price record. As long as the contracted price is active, the discount schedule on the Contracted Price record overrides the discount schedule on the product record.

Effective Date

When a sales rep adds a product with a contracted price to a quote, Salesforce CPQ evaluates the current date. If the current date falls between the contracted price's effective date and expiration date, including both of those dates, Salesforce CPQ uses the product's contracted price instead of the product's pricebook price.

Expiration Date

When a sales rep adds a product with a contracted price to a quote, Salesforce CPQ evaluates the current date. If the current date falls between the contracted price's effective date and expiration date, including both of those dates, Salesforce CPQ uses the product's contracted price instead of the product's pricebook price.

Non Discountable

Salesforce CPQ prevents further discounting for the product related to this contracted price.

Price

The price your sales rep negotiated with the customer. During quote line price calculation, this value overrides the quote line's list unit price. You can set either a price or a discount on a contracted price record, but not both.

Product

All quote lines for this product on this account receive the contracted price defined in this record.

Guidelines for the Effective Quantity Field

EDITIONS

Available in: All Salesforce CPQ Editions

The quote line's effective quantity field represents the actual quantity that Salesforce uses while calculating prices for that quote line. For some objects, such as amended quote lines and quote lines from slab-discounted or block-priced products, the effective quantity has a different value than the quantity.

Amended Quote Lines

Amendment quote lines have an effective quantity that represents the difference between the original quote line's quantity and the amended quantity. For example, if your original quote line had a quantity of 10, and your amended quote line had a quantity of 15, the amended line would have an effective quantity of 5.

Block-Priced Quote Lines

Block prices are not unit prices, so Salesforce CPQ doesn't multiply a block-priced quote line's quantity by its price. Instead, Salesforce CPQ uses quote line quantity only to calculate which block price tier the quote line falls in before discounts. It then assigns the quote line an effective quantity of 1. Salesforce CPQ uses the effective quantity of one for all other pricing calculations on the quote line.

For example, consider the following block price.

Block Prices [New Block Price] [Edit All] Block Prices Help

Action	Price Name	Lower Bound	Upper Bound	Price
Edit | Del	1	1	21	$2,000.00
Edit | Del	2	21	41	$3,750.00
Edit | Del	3	41	61	$4,250.00

When a sales rep enters a quantity of 10, the price before discount is $2000 – not 8 * $2000 = $16000.

Slab-Discounted Quote lines

Salesforce CPQ uses the quantity entered for slab products only for the calculation of the discount percentage applied to each unit. Because the per-unit discount percentage can vary across units depending on the tier, the quote line does not have a consistent per-unit price. All slab-discounted quote lines also have an effective quantity of 1 for all other pricing calculations on the quote line.

Tip: If you want to display the quote line's quantity on an opportunity product, make a custom opportunity product field that shows the quote line's quantity value. You can then hide the effective quantity field if you don't need it displayed.

Allow Users to Define Custom Product Pricing

Give your sales reps more control and flexibility around product prices. For each product record where you want to enable custom pricing, you can allow sales reps to either define their own price or select a pricing method. Then, reps can do things like set product prices outside of standard discount and markup fields.

EDITIONS

Available in: All Salesforce CPQ Spring '16 and later

1. Make sure your quote line's line editor field set contains the List Unit Price, Customer Unit Price, and Pricing Method fields.
2. From the product record that you want to enable custom pricing for, decide whether you want to allow sales reps to define their own list unit price, define their own custom unit price, or select a pricing method.
   a. To let sales reps define their own list unit price, make sure your product has a price method set to List, then select the **Price Editable** field on the product record.

      The quote line's Price Editable field inherits the value of your product's Price Editable field. If you want to allow custom list prices for only certain quote lines, you can also select **Price Editable** on the quote line records.

      Sales reps can edit the list unit price for all quote lines related to this product in the quote line editor.

   b. To let sales reps define their own customer unit price, set the product's **Pricing Method** field to Custom.

      The quote line's pricing method inherits the value of your product's pricing method. If you want to allow custom customer unit prices for only certain quote lines, you can also select use custom pricing methods on the quote line records. Remember that Salesforce CPQ doesn't apply customer discounts to customer unit price, but it does apply partner discounts and distributor discounts.

   c. To let sales reps select a pricing method, select the **Pricing Method Editable** field on your product record.

      The quote line's Pricing Method Editable field inherits the value of your product's Pricing Method Editable field. If you want to let sales reps change pricing methods for only certain quote lines, you can also select **Price Method Editable** on the quote line records.

      Important:

      If you let sales reps change the pricing method, make sure you have records available to match the new method. For example, if sales reps can switch a product from list to cost pricing, make sure that product has a cost record.

      Sales reps can choose List, Cost, Block, or Percent of Total from the quote line's Pricing Method field in the quote line editor.

Example: Your company sells data security licenses, which you price by default through list pricing. You want to allow sales reps to use block pricing to give a discount to past customers.

1. Define block prices for your product.
2. Set your product's pricing method to List.
3. Select **Pricing Method Editable** on your product.

When your sales reps add data security licenses to your quote, the licenses are priced by the quote line's list unit price. However, if your sales reps want to allow block pricing, they can choose Block Pricing from the quote line's Pricing Method field. Then, Salesforce CPQ prices the quote line based on the block prices that you defined on the data security license's product record.

Tip:

- Salesforce CPQ overrides the quote line's list unit price with the custom price. Some sales reps may still want to track the quote line's initial price before any changes are made. You can allow this by adding the Original Price field to your quote line's line editor field set. Original Price always displays the price book value of the product for your quote line. We recommend that you don't edit the Original Price field.

- A quote line's list price is editable only when its Pricing Editable field is selected and its Pricing Method field also has a value of List. Otherwise, the list price is locked.

Summary Variables

EDITIONS

Available in: **All** CPQ Editions

Summarize number field information about products into a single object called a summary variable. You can then reference the summary variables in your quotes, quote line fields, and product rules.

A summary variable targets a field on an object and then performs a math function on that field. You can set a target object and leave the filter information fields blank to target all instances of that object across your quote. You can also customize the filter fields to target only the fields and values you need—for example, all product options where Product Code equals "LJ-TONER."

The Aggregate Function field sets the type of math function the summary variable performs. You can choose from:

- Add all values in that field together (Sum)
- Calculate the average of all values in that field (Average)
- Find the lowest of all values in that field (Min)
- Find the highest of all values in that field (Max)

The Aggregate Field represents the field where you're performing the function. This field needs to be a number field, such as Quantity or List Price.

Composite information fields let you add to, subtract from, multiply, and divide the result of your function.

Important: Configurator-scoped product rule conditions can't use summary variables that target product options.

Example: You need to calculate the number of wireless access points to add to a quote. Twelve laptops can connect to one access point. You need a summary variable that sums the number of laptops on a quote and divides it by 12. Your laptops have a product code of PCPRO.

- Variable Name: Laptops / 12
- Target Object: Quote Line
- Aggregate Function: Sum
- Aggregate Field: Quantity
- Filter Field: Product Code
- Filter Value: PCPRO
- Operator: Equals
- Composite Operator: Divide
- Value Element: 12

Example of Summary Variable Data in the Quote Line Editor

Show summary variable data in a field within the quote line editor. This setup is useful for quickly referencing summarized data within a quote line. For example, sales reps can easily see the total quantity and price of products within a certain product family on a large quote.

Example of Summary Variable Data in the Quote Line Editor

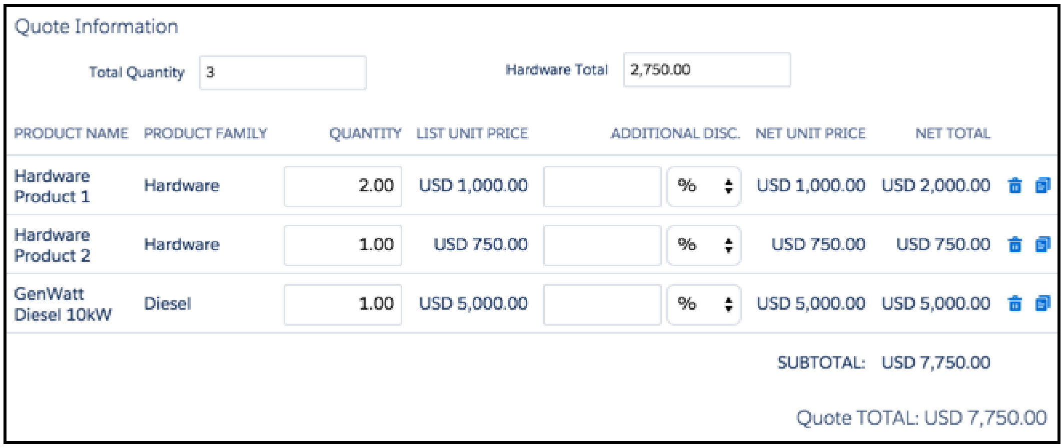
EDITIONS

Available in: Salesforce CPQ Winter '15 and later

Show summary variable data in a field within the quote line editor. This setup is useful for quickly referencing summarized data within a quote line. For example, sales reps can easily see the total quantity and price of products within a certain product family on a large quote.

Example: Your sales rep is working on a construction company's order, which contains several large pieces of construction hardware to be used alongside diesel power generators. The rep wants to quickly reference the total number of hardware products so that they can add an appropriately sized shipping charge to the quote. They also want to reference the hardware total price so that they can add the correct insurance package. You can create fields on the quote line that summarize Hardware Product Family Quantity and Price.

1. Create a quote field with a label of Total Quantity and API Name of SBQQ__Total_Quantity__c.
2. Create a quote field with a label of Hardware Total and an API Name of SBQQ__Hardware_Total__c.
3. Create a summary variable that summarizes the list total of products within the hardware product family.
   - Variable Name: Hardware Total
   - Target Object: Quote Line
   - Aggregate Function: Sum
   - Aggregate Field: List Total
   - Filter Field: Product Family
   - Filter Value: Hardware
   - Operator: Equals
4. Create a summary variable that summarizes the quantity of products within the hardware product family. This summary variable is the same as the one you made in Step 3. The only differences are that the name has a value of Total Quantity and the aggregate field has a value of Quantity.
5. Create a price rule that searches for quote lines in the hardware product family.
6. Within this price rule, create a price action that sets the Hardware Total field equal to the hardware total summary variable you made in Step 2.
7. Create another price action that sets the total quantity field equal to the total quantity summary variable you made in Step 2. Both price actions target the quote.
8. Add the Hardware Total and Total Quantity fields to your quote's line editor field set.



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Show summary variable data in a field within the quote line editor. This setup is useful for quickly referencing summarized data within a quote line. For example, sales reps can easily see the total quantity and price of products within a certain product family on a large quote.

Show Summary Variable Data in the Quote Line Editor

Show summary variable data in a field within the quote line editor. This setup is useful for quickly referencing summarized data within a quote line. For example, sales reps can easily see the total quantity and price of products within a certain product family on a large quote.

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

1. Create a custom number field on your quote. This field shows the value of your summary variable.
2. Create your summary variable.
3. Create a price rule with a price action that sets the value of your custom decimal field to the value of your summary variable.
4. Add your custom field to your quote's line editor field set.

CPQ Product Fields

Salesforce CPQ provides various custom managed fields for products.

EDITIONS

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Asset Conversion	SBQQ__AssetConversion__c	Picklist	Determines how quote lines for this product are converted to assets. Select either One Quote per Line or One Quote per Unit.
Batch Quantity	SBQQ__BatchQuantity__c	Number (10,2)	Quantity in one batch for products sold in batches. Quantity entered in quote line is

Field	API Name	Data Type	Definition
			divided by this value and rounded up to the nearest integer.
Block Pricing Field	SBQQ__BlockPricingField__c	Picklist	Field used to calculate block pricing.
Component	SBQQ__Component__c	Checkbox	Marks this product as a component, excluding it from selection in product lookup.
Compound Discount (%)	SBQQ__CompoundDiscountRate__c	Percent(5, 3)	Discount rate compounded by quantity.
Configuration Event	SBQQ__ConfigurationEvent__C	Picklist	Choose an option to control when Configure Products screen shows up for this product. • Select Add to show the Configure Products screen only during initial configuration. • Select Edit to show the Configure Products screen only on subsequent configuration.
Configuration Fields	SBQQ__ConfigurationFields__c	Long Text Area	Additional fields collected during configuration of this product. All these fields must exist on Product Option and Quote Line objects.
Configuration Field Set	SBQQ__ConfigurationFieldSet__c	Picklist	Choose the field set that is used for this product during configuration.
Configuration Form Title	SBQQ__ConfigurationFormTitle__c	Text(100)	Title of the configuration form rendered from specified configuration fields.
Configuration Type	SBQQ__ConfigurationType__c	Picklist	Choose the configuration type of this product: • Allowed if the user is allowed to configure the bundle, but not required to, • Disabled when your bundle automatically selects options, or

Field	API Name	Data Type	Definition
			• Required if the bundle must be configured.
Configuration Validator	SBQQ__ConfigurationValidator__c	Long Text Area	JavaScript function used to validate configuration of this product.
Configured Code Pattern	SBQQ__ConfiguredCodePattern__c	Text(255)	Pattern used to generate product code (SKU) for configured products.
Configured Description Pattern	SBQQ__ConfiguredDescriptionPattern__c	Rich Text Area	Pattern used to generate dynamic product description for configured products.
Cost Editable	SBQQ__CostEditable__c	Checkbox	Controls whether cost for this product may be modified on individual quotes.
Cost Schedule	SBQQ__CostSchedule__c	Lookup(Discount Schedule)	Discount schedule for used as a Cost Schedule with this product.
Custom Configuration Page	SBQQ__CustomConfigurationPage__c	Text(40)	
Custom Configuration Required	SBQQ__CustomConfigurationRequired__c	Checkbox	
Customer Community Availability	SBQQ__CustomerCommunityAvailability__c	Picklist	Select how this product should be available in Customer Communities. • Only When Already Owned:Product will only be available within Customer Communities when selected through customer self-service. • Always:Product is always available to all members of Customer Communities. • Never: Product is never available within Customer Communities.
Default Quantity	SBQQ__DefaultQuantity__c	Number(13, 5)	Specifies the starting quantity of the product when added.
Default Pricing Table (v24.2)	SBQQ__DefaultPricingTable__c	Picklist	Select the pricing table this product should appear in by default when price dimensions are defined.

Field	API Name	Data Type	Definition
			• Segmented: MDQ products appear in the Segmented table where you can edit segments of time. • Standard: MDQ products appear in the Standard table and behave as a single line item. Users are able to resegment the line item if they choose.
Disable Reconfiguration	SBQQ__ReconfigurationDisabled__c	Checkbox	Flag that disables re-configuration of this product.If selected, users will not have access to a Configure link on the Edit Lines page after product has been added.
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup(Discount Schedule)	Discount schedule for use with this product.
Dynamic Pricing Constraint	SBQQ__DynamicPricingConstraint__c	Picklist	Specifies constraints on dynamically-calculated pricing. • List Price is Minimum:Applies the list price when the calculated percent of total falls below the list price. • List Price is Maximum:Applies the list price when the calculated percent of total exceeds the list price.
Exclude From Percent of Total	SBQQ__ExcludeFromMaintenance__c	Checkbox	Salesforce doesn't use this product when calculating the price of a Percent of Total product on the same quote. Use this field only on a covered product.
Exclude From Opportunity	SBQQ__ExcludeFromOpportunity__c	Checkbox	Indicates that this product should be excluded from transfer to the Opportunity.
Generate Contracted Price	SBQQ__GenerateContractedPrice__c	Picklist	Choose Yes to auto-generate a contracted price on an Account

Field	API Name	Data Type	Definition
			when the Opportunity is contracted.
Has Configuration Attributes	SBQQ__HasConfigurationAttributes__c	Checkbox	Checks to see if this product has configuration attributes.
Hidden	SBQQ__Hidden__c	Checkbox	Excludes this product from appearing on the quote PDF.
Hide Price in Search Results	SBQQ__HidePriceInSearchResults__c	Checkbox	Indicates whether the product price should be displayed in the Product Search Results.
Include in Percent of Total	SBQQ__IncludeInMaintenance__c	Checkbox	Check to Include products in percent-of-total calculations that are normally excluded (for example: subscription products).
Lock Description	SBQQ__DescriptionLocked__c	Checkbox	Flag that indicates this product's description is locked (not editable on the quote).
New Quote Group	SBQQ_NewQuoteGroup__c	Checkbox	Create a new quote group when this product is added (unless the current group is empty).
Non Discountable	SBQQ__NonDiscountable__c	Checkbox	Marks this product as non-discountable.
Non Partner Discountable	SBQQ__NonPartnerDiscountable__c	Checkbox	Check to make this product non-discountable for partners.
Optional	SBQQ__Optional__c	Checkbox	Select if this product is optional by default. Optional products don't contribute to quote total or get transferred to the opportunity.
Option Layout	SBQQ__OptionLayout__c	Picklist	Choose how to present options to users.
Option Selection Method	SBQQ__OptionSelectionMethod__c	Picklist	Determines how options are presented to users: • Click:Users select options by clicking in a checkbox next to the option. • Add: Users click an Add button which opens an Option Selection page with all available options.

Field	API Name	Data Type	Definition
Percent of Total (%)	SBQQ__SubscriptionPercent__c	Percent(4,3)	A Percent of Total product's price is this percentage of the total list price of its covered products.
Percent of Total Base	SBQQ__SubscriptionBase__c	Picklist	Define whether your Percent of Total product calculates its price based on the list price, net price, customer price, or regular price of its covered products. If you don't choose a value, calculations default to the list price.
Percent of Total Category	SBQQ__SubscriptionCategory__c	Picklist	A Percent of Total product with a category calculates its price based only on covered products with the same category. You can add any values to this picklist. For example, if you want a hardware maintenance Percent of Total product to cover only hardware products, set the Percent of Total Category to Hardware on the Percent of Total product and all your hardware products.
Percent of Total Constraint	SBQQ__DynamicPricingConstraint__c	Picklist	Define whether your Percent of Total product limits its maximum or minimum calculated price to its own list price. This field is useful to account for quantities of covered products that are much larger or smaller than usual.
Percent of Total Target	SBQQ__SubscriptionTarget__c	Lookup(Product)	Your Percent of Total product can calculate its price based off this product instead of any other product on your quote. This field is useful in situations where you don't want to base your Percent of Total product's price off its subscribed asset.
Price Editable	SBQQ__PriceEditable__c	Checkbox	Indicates that this product allows for price to be freely editable when building a quote.

Field	API Name	Data Type	Definition
Pricing Method	SBQQ__PricingMethod__c	Picklist	Apply a pricing method to this product. • List: Standard pricebook pricing. • Cost: Use for cost+markup pricing. • Block: Use if you have block prices on the product. • Percent of Total: Use for products whose pricing is based on other products.
Pricing Method Editable	SBQQ__PricingMethodEditable__c	Checkbox	Specifies whether Pricing Method may be changed when this product is added to quote.
Product Picture ID	SBQQ__ProductPictureID__c	Text(18)	ID of Document or Content record that holds the picture for this product.
Quantity Editable	SBQQ__QuantityEditable__c	Checkbox	Allow or prevent changing the quantity for this product.
Quantity Scale	SBQQ__QuantityScale__c	Number(1, 0)	Specifies the number of decimal places used in the Quantity field.
Renewal Product	SBQQ__RenewalProduct__c	Lookup(Product)	Product that replaces this product on renewal. Use this to quote a different SKU when renewing.
Sort Order	SBQQ__SortOrder__c	Number(18,0)	Determines a default sort order of products in the Product Lookup page, and therefore the order in which they are added to the quote.
Specifications	SBQQ__Specifications__c	Rich Text Area(32000)	Formatted specifications for this product for use in quote templates to produce spec sheets.
Subscription Pricing	SBQQ__SubscriptionPricing__c	Picklist	Type of pricing to use for this subscription, either None,Fixed Price orPercent of Total.Nonemeans this product is not a subscription.

Field	API Name	Data Type	Definition
Subscription Term	SBQQ__SubscriptionTerm__c	Number(5, 0)	Term length of this subscription. Only applicable if the product is a subscription.
Subscription Type	SBQQ__SubscriptionType__c	Picklist	Select the type of Subscription, either Renewal, One-time, Renewable/Evergreen, or Evergreen. Renewable subscriptions transfer to renewal quotes. One-time subscriptions will not. This will determine whether the product is renewable and has the option to be evergreen during the quoting process.
Taxable	SBQQ__Taxable__c	Checkbox	Indicates whether this product is taxable.
Term Discount Level	SBQQ__TermDiscountLevel__c	Picklist	Specify subscription term level that should be used in calculating term discount. Leave blank to indicate default.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	Specify subscription term level that should be used in calculating term discount. Leave blank to indicate default.
Upgrade Credit	SBQQ__UpgradeCredit__c	Lookup(Product)	Use to specify credit when quoting upgrades to this product.
Upgrade Source	SBQQ__UpgradeSource__c	Lookup(Product)	Product being upgraded. Populating this field makes this product an upgrade.
Upgrade Target	SBQQ__UpgradeTarget__c	Lookup(Product)	Specify the upgraded product. Only applicable if this product is an upgrade as indicated by Upgrade From field being populated.

Create and Edit CPQ Quotes

Create a quote for your customers. After you add products to your quote, you can adjust their quantities, configuration, and pricing.

EDITIONS

Available in: **All** CPQ Editions

Using the Quote Line Editor

EDITIONS

Available in: **All** CPQ Editions

Add or remove products, apply discounts and markups, and calculate prices for your quote.

Select **Edit Lines** on a quote record to open the quote line editor. The quote line editor lets you view all your quote lines and apply changes across the entire quote or to individual lines.

If your quote line editor shows a field above your quote line list, you can edit that field and then save or calculate the quote to apply the field across all your quote lines. You typically use this process for applying quote-wide discounts or markups—for example, through the Additional Discount (%) or Markup (%) fields.

The quote line editor contains several buttons to help you make your quote.

Add Products

This menu can contain standard buttons or custom actions that your Salesforce CPQ administrator created. It includes the following standard buttons by default.

- Add Products: Go to the Product Lookup page and select products to add to your quote.

- Add Favorites: Go to the Favorites page within the Product Lookup page, where you can add previously saved or shared favorite records to your quote.
- Upgrade Assets: Choose assets to upgrade on your quote.
- Renew Subscriptions: Renew your quote's active subscriptions.

Calculate

Salesforce CPQ applies price calculations to your quote, including all relevant price rules and product rules. Click this button to recalculate your quote's prices after you make changes.

Delete Lines

You can select several lines and then click this button to delete all the lines at once. You see this button only if your Salesforce CPQ administrator enabled it.

Groups

Add line item groups to your quote.

Quick Save

Save your quote line changes without leaving the quote line editor.

Reset Discounts

Reset all user-applied discounts.

Save

Save your quote line changes and return to the quote detail page.

Cancel

Return to the quote detail page without saving your changes.

Groups

Apply discounts or obtain totals for specific sets of quote lines by organizing them into groups. You can create ad hoc groups on the quote record itself or create dedicated solution groups for selection across any quote.

Sorting Column Headers in the Quote Line Editor

You can sort columns in the quote line editor by clicking the arrow to the right of the column header. Columns with alphabetical values may be sorted by alphabetical or reverse-alphabetical order, while columns with numerical values may be sorted by ascending or descending order.

Custom Actions

A custom action provides extra actions for your sales reps in the quote line editor or configurator. For example, they can select a button to show a filtered section of your price book or direct users to an internal or external URL.

Search from the Quote Line Editor

There are several ways to search for products and add them to your quote using the Salesforce CPQ quote line editor.

Guidelines for Cloning Quote Lines

You can clone a product in the line editor and reconfigure it before finalizing your quote.

Quote Line Editor Drawers

Organize excess line editor fields in collapsible drawers shown under each quote line.

Guided Selling

Create a prompt that asks sales reps about the types of products they want when they're adding products to a quote. Salesforce CPQ reviews their answers and shows the Add Products page with a list of products that match their responses. We call this process "guided selling."

Show Product Image Fields in the Quote Line Editor

If your product record contains a custom image field, you can show that image within any of that product's quote lines in the quote line editor.

Add Fields to the Quote Line Editor Field Set

Add fields to quote line's line editor field set so that they display at the top of the quote line editor. Your sales reps can edit those fields and save or calculate the quote to apply the field across all the quote's quote lines.

Large Quote Experience

Configure the quote line editor so you can quickly navigate through quotes with many list items.

Large Quote Performance Settings

Improve line editor performance for large quotes by using the Large Quote Threshold and Quote Batch Size package settings.

Quote Line Fields

Quote lines store information about products that a sales rep has quoted. With certain page layout and field-level security settings, some fields aren't visible or editable.

Groups

Apply discounts or obtain totals for specific sets of quote lines by organizing them into groups. You can create ad hoc groups on the quote record itself or create dedicated solution groups for selection across any quote.

EDITIONS

Available in: **All** CPQ Editions

Quote Line Groups

Apply discounts or obtain totals for specific sets of quote lines by organizing them into groups within the Line Editor.

Solution Groups

A solution group is a predefined quote line group that sales reps can add to any quote. Solution groups are useful if you have a well-defined set of common quote line groupings.

Quote Line Groups

Apply discounts or obtain totals for specific sets of quote lines by organizing them into groups within the Line Editor.

EDITIONS

Available in: **All** CPQ Editions

Create quote line groups by selecting one of the following.

- The **Group Line Items** checkbox
- **Groups** > **Add Group** in the Quote Line Editor

When you make the first group on a quote, Salesforce CPQ places all line items into the group. If you make more groups, you can drag products between different groups.

Change group field sets by editing the quote line group object's Line Editor field set.

Example: To apply an Additional Discount to all the software in your quote, create two groups on a new quote: one for software and one for all other products. Add your software products to the software group and make sure that you have Additional Discount in your group Line Editor field set. This way, you can apply the Additional Discount to only the products in the software group.

Create Quote Line Groups

Use quote line groups to organize related quote lines in your quote. You can apply field values to all the group's quote lines at once.

Create Quote Line Groups

EDITIONS

Available in: All Salesforce CPQ Editions

Use quote line groups to organize related quote lines in your quote. You can apply field values to all the group's quote lines at once.

1. From the quote line editor, click **Add Group**.

   Quotes with groups can't contain ungrouped quote lines.

   If your quote already has quote lines, they're all added to your first group.
2. Within the group, click **Add Products** to open the Product Selection page.
3. Select the products to add to your group, then click **Select** to return to the quote line editor.
4. To add another group, click **Add Group**.
5. To remove all groups from your quote, click **Ungroup**.
   Salesforce CPQ lists all the formerly grouped line items as standard line items.
6. The left side of your quote group header contains the group's name and description. Click these fields to edit them.
7. The right side of your quote group header contains quote line fields that your Salesforce admin enabled for editing at the group level. You can enter a value in one of those fields to apply it to all the group's quote lines.
8. To clone or delete your group, click the dropdown arrow next to Add Products and then click **Clone Group** or **Delete Group**.

Solution Groups

EDITIONS

Available in: **All** CPQ Editions

A solution group is a predefined quote line group that sales reps can add to any quote. Solution groups are useful if you have a well-defined set of common quote line groupings.

You can save time by having these groups available right away rather than manually recreating them in each of your quotes. For example, if you normally quote a selection of hardware products in one group and a selection of software products in another group, you can create two solution groups. Titled the groups Hardware and Software and make them available to all users when they add line items to their quotes.

When a user selects **Groups** in the quote line editor, they see a list of available solution groups below Add Group and Ungroup Quote. Selecting a solution group creates a group with your solution group's title.

To enable solution groups, select **Solution Group Enabled** in your Groups package settings. You can then create and title as many solution group records as you need.

Sorting Column Headers in the Quote Line Editor

EDITIONS

Available in: All Salesforce CPQ Editions

You can sort columns in the quote line editor by clicking the arrow to the right of the column header. Columns with alphabetical values may be sorted by alphabetical or reverse-alphabetical order, while columns with numerical values may be sorted by ascending or descending order.

- The first click sorts by the column by alphabetical/descending order. The second click sorts by reverse alphabetical/ascending order. The third click returns the column values to their original position.
- The quote line editor saves the order of sorted columns after you click **Save** or **Quick Save**.
- Sorting respects the Keep Bundle Together field.
- Salesforce CPQ sorts segmented products independently from standard products.
- Sorting applies to bundle children as well. Salesforce CPQ sorts the parent line relative to other lines in the column. Then, it sorts all of a bundle's children relative to each other.

Custom Actions

EDITIONS

Available in: Salesforce CPQ **Spring '14** and later

A custom action provides extra actions for your sales reps in the quote line editor or configurator. For example, they can select a button to show a filtered section of your price book or direct users to an internal or external URL.

Custom actions appear as buttons or links that your sales reps can select. They perform two types of functions.

- Opening the Add Products page and showing a filtered list of products from your price book.
  For example, your company sells laptops, desktops, and tablets. You can create three buttons, each of which shows the Add Products page, with products filtered by one of those three product types.
- Linking a user to an external or internal URL. For example, your company sells products through a partner. You can create a button that directs sales reps to your partner's inventory page, letting them quickly review product information beyond what's in the quote line editor.

You can create conditions for your custom action and associate them with the Conditions Met field. If your action contains conditions, Salesforce CPQ doesn't show the action until your quote meets them.

Salesforce CPQ ships with several custom actions available by default.

- Add Products
- Add Favorites
- Save
- Quick Save
- Reset Discounts
- Delete Lines
- Add Groups
- Optional: All

Note: Salesforce CPQ supports a maximum of five custom actions in the quote line editor.

Custom Action Fields

Review these custom action fields, listed in alphabetical order. With certain page layouts and field-level security settings, some fields aren't visible or editable.

Create a Filtering Custom Action

Create a custom action that filters products, subscriptions, or assets in the quote line editor or configurator.

Create a Custom Action That Opens an External URL

Create a custom action that links to an internal or external URL.

Create a Conditional Custom Action

A custom action condition uses a logical operator to compare the value of a quote field against a user-defined value. Define conditions for your custom action so that the action's button shows only when any or all its conditions are true.

Parameters for Custom Actions

Your custom action can target several fields across objects that interact with the quote line editor.

Guidelines for Custom Actions

When you're working with custom actions, consider key guidelines.

Custom Action Fields

Review these custom action fields, listed in alphabetical order. With certain page layouts and field-level security settings, some fields aren't visible or editable.

EDITIONS

Available in: All Salesforce CPQ Editions

Custom Action Fields

Action Name
Define a name for this record. This name doesn't appear on the button. It's only for reference among your list of custom action records.

Active
Select this field to show this custom action on your target page.

Conditions Met
Choose whether your custom action must meet any or all its conditions so that it perform its action.

Default
By default, Salesforce CPQ directs sales reps to the quote line editor when they save a new quote. However, if you select the Default field for a custom action that shows filtered products, Salesforce CPQ takes your sales reps to the filtered product list.

Display Order
Salesforce CPQ orders custom actions based on their display.

Icon
If your custom action is a button, you can make it appear as an icon image.

Page
Choose whether this custom action appears in the configurator or the quote line editor.

Target Object
If your custom action lets sales reps add a record to their quote, choose whether this custom action directs them to a selection page for products, assets, or subscriptions.

Type
Choose how this custom action appears as a UI element.

URL
If this custom action directs sales reps to a different page, define a URL or Salesforce CPQ field parameters.

- The URL must start with `http://` or `https://`.
- Field parameters must include the field's API name, with each parameter separated by a forward slash. Example: `{!SBQQ__yourField__c}/{!SBQQ__yourField2__c}`

URL Target
If your custom action targets a URL, specify whether clicking the custom action replaces the current page or opens a new page in your sales rep's browser.

Create a Filtering Custom Action

Create a custom action that filters products, subscriptions, or assets in the quote line editor or configurator.

EDITIONS

Available in: Salesforce CPQ **Spring '14** and later

1. Set your custom action's target object to Product, Asset, or Subscription.

   When a user selects your custom action, Salesforce CPQ opens a selection page for the chosen object.

2. Select Quote Line Editor or Configurator from the Page field. Your custom action appears on your selected location.

3. If you selected **Quote Line Editor**, your custom action appears by default at the top of the quote. Change its Location field to show it in a quote group or quote line.
4. Set the Type and Icon fields to customize how your custom action appears.
5. Create a search filter in the Search Filters related list.

   Salesforce CPQ filters available objects based on these parameters in the selection page you defined. For example, you can define a filter that shows lines on your configurator page where the Product Name equals "Software."
6. Select **Default** if you want Salesforce CPQ to activate this custom action when the user opens the quote. This process directs the user directly to the selection screen you defined in Step 1 rather than the quote line editor.
7. Create conditions for your custom action and associate them with the Conditions Met field. If your action contains conditions, Salesforce CPQ doesn't show the action until your quote meets them.
8. If you have multiple custom actions, set their Display Order fields to determine where they appear in the UI. Salesforce CPQ orders custom actions from left to right, starting with values of 1.
9. Enter a description that appears when users hover over the custom action button.

Example: You want a custom action that shows all Diesel products available for selection.

Custom Action

- Label: Diesel Filter
- Target Object: Product
- Display Order: 1
- Active: Selected
- Page: Quote Line Editor
- Location: Quote

Search filter for your custom action:

- Filter Name: Diesel Filter
- Display Order: 1
- Target Object: Product
- Target Field: Name
- Operator: Equals
- Filter Value: Diesel

Create a Custom Action That Opens an External URL

Create a custom action that links to an internal or external URL.

EDITIONS

Available in: Salesforce CPQ Spring '14 and later

1. On the Custom Actions home page, click **New**.
2. Give your custom action a name.

   This name doesn't appear on the button for your action. It's used only to help you organize your custom actions records.
3. Give your custom action a label.

   This label appears on the button for your action. You can pick from several default labels. You can also add labels by adding values to the label field in the Custom Action object's managed settings.
4. If your custom action appears only in response to its conditions, pick a value for the Conditions Met field.

5. Choose a number for your custom action's display order. Custom actions with lower display orders appear first in their target page.
6. Select the **Active** field.
7. Use the Page field to pick whether your custom action appears in the quote line editor or configurator.
8. Pick a location for your custom action.
9. Specify a URL in the URL field.
10. Set the URL Target field so the URL you link to replaces your active page or opens the page in a new browser window.

Example: Your company sells custom desktops. You'd like to provide your sales rep with links to the inventory pages of your three largest vendors.

- Action Name: Case Vendor 1
- Label: Joe's Desktops
- Description: Open the inventory for Joe's desktops in a new tab.
- Active: Selected
- Page: Quote Line Editor
- Display Order: 1
- URL: http://joesdesktops.com
- URL Target: Popup

Use this format on the 2 custom actions for your other vendors. Remember to give each action a unique Display Order number in the order you want them to appear in the quote line editor.

Create a Conditional Custom Action

A custom action condition uses a logical operator to compare the value of a quote field against a user-defined value. Define conditions for your custom action so that the action's button shows only when any or all its conditions are true.

A custom action condition uses a logical operator to compare the value of a Salesforce admin-defined quote or product field against an admin-defined value. When that comparison is true, the custom action appears in its position within the quote line editor or configurator.

EDITIONS

Available in: Salesforce CPQ Spring '14 and later

1. From your custom action record, in the Custom Action Conditions related list, click **New Custom Action Condition**.
2. Choose the target object that contains the field to evaluate.
3. Choose the target field to evaluate.
4. Choose a value for the operator to use in the comparison.
5. Provide a text string for your filter value. This string represents the value you compare against the value of your target field.
6. Save your custom action condition.
7. From your custom action record, choose a value for the Conditions Met field. This field specifies whether your custom action must meet any or all its conditions in order to show its button in the quote line editor or configurator.

Parameters for Custom Actions

Your custom action can target several fields across objects that interact with the quote line editor.

EDITIONS

Available in: Salesforce CPQ Summer '14 and later

Custom Action Parameters

Quote

`Created Date`

`CurrencyIsoCode`

`Id`

`SBQQ__Account__c`

`SBQQ__AdditionalDiscount__c`

`SBQQ__CustomerAmount__c`

`SBQQ__CustomerDiscount__c`

`SBQQ__DaysQuoteOpen__c`

`SBQQ__DistributorAmount__c`

`SBQQ__EndDate__c`

`SBQQ__ExpirationDate__c`

`SBQQ__FirstSegmentTermEndDate__c`

`SBQQ__LineItemsGrouped__c`

`SBQQ__ListAmount__c`

`SBQQ__MarkupRate__c`

`SBQQ__MasterContract__c`

`SBQQ__NetAmount__c`

`SBQQ__Opportunity__c`

`SBQQ__PartnerDiscount__c`

`SBQQ__PricebookId__c`

`SBQQ__Primary__c`

`SBQQ__QuoteProcessId__c`

`SBQQ__RegularAmount__c`

`SBQQ__StartDate__c`

`SBQQ__Status__c`

`SBQQ__SubscriptionTerm__c`

`SBQQ__TotalCustomerDiscountAmount__c`

`SBQQ__Type__c`

Account

`CurrencyIsoCode`

`Name`

`Id`

Opportunity

`AccountId`

`CurrencyIsoCode`

```
Id
Pricebook2Id
```

Guidelines for Custom Actions

When you're working with custom actions, consider key guidelines.

EDITIONS

Available in: Salesforce CPQ Summer '14 and later

- By default, custom actions inherit the group button styling assigned to buttons in an active theme. As of Salesforce Winter '16, custom actions can inherit brand button styling. You can change this setup by going to a custom action record and selecting the **Brand Button** field. When this field is selected, all custom actions with a Type field set to Button inherit the active theme's brand button styling.
- All default CPQ custom actions have a Display Order field set to 900 or higher. We set this number so you can easily identify your own custom actions from the defaults.
- Salesforce supports a maximum of five custom actions in the quote line editor.

Search from the Quote Line Editor

There are several ways to search for products and add them to your quote using the Salesforce CPQ quote line editor.

EDITIONS

Available in: All Salesforce CPQ Editions

Search Filters
Use the quote line editor's search filter to filter products, assets, or subscriptions by their field values.

CPQ Product Search
Search products in your quote's price book by using the Product Search box on the Product Selection page. Then choose products from the results to add to your quote.

Group Product Selection by Field
Configure the Product Selection page to group products into dropdown lists organized by shared field values. This layout helps organize the Product Selection page for sales reps and is especially useful if your company has a large product catalog.

Use Lookup Fields in the Quote Line Editor
Add a lookup field to your quote lines and use it in the quote line editor to associate your quote line with another record. You can also customize the fields that appear in the lookup field's record search box.

Search Filters

Use the quote line editor's search filter to filter products, assets, or subscriptions by their field values.

EDITIONS

Available in: **All** CPQ Editions

Select **Add Products** in the quote line editor, and then select the filter icon to show the search filter box. You can search by Product Code, Product Name, Product Family, and Product Description by default. You can also add and remove standard or custom fields to any search filter by editing the product object's search filter field set.

Example: Your products have a custom Industry field. You want to filter products based on this value. Create a search filter with the following setup.

- Target Object: Select **Product**.
- Target Field: Select **Industry**.

- Operator: Select **Contains**.
- Display Order: This number determines where your new filter is ordered relative to other search filters in the search filter box. Blank values place the new filter under numbered values. Blank values across several search filters cause those filters to appear in alphabetical order.
- Filter Value: Add a text value that automatically searches and filters before the user inputs any text. For example, if your Industry field values contain "IT - Software," "IT - Hardware," and "Agriculture," set this value to IT so your users can search only for IT products.
- Hidden: Select to hide this filter from the UI. Hidden filters still contribute to search queries. Set this field with an established filter value if you don't want users to know that search results are limited.
- Action: You can use search filters with custom actions. For example, you can have an Add Hardware custom action that filters products on the Search Filter criteria "Product Industry = IT." This field's value relates the search filter to the custom action. Users can then select that custom action in the quote line editor to automatically filter products.

CPQ Product Search

Search products in your quote's price book by using the Product Search box on the Product Selection page. Then choose products from the results to add to your quote.

Enter your search value and commit the search by pressing enter or clicking the search icon. The product keyword search evaluates products in the product catalog against any managed or custom fields on your product objects. It then shows the matching records on the Product Selection page.

EDITIONS

Available in: Salesforce CPQ Spring '17 and later

Important: The product search doesn't search favorites or values stored in picklist fields.

The search box shows a dropdown menu with possible matches when you enter at least two characters. Selecting one of these results shows that specific record.

Example: Use the product filter before or after the product keyword search to further customize your search process. Consider the following food product catalog where all values are text fields on the product. You also have a product search filter sidebar with options for type, color, and producer.

Product	Type	Color	Producer
Chocolate Coins	Candy	Yellow	Kelly's Candy
Sweet Candy	Candy	Yellow	Mike's Candy
Banana	Fruit	Yellow	Sam's Fruit
Cheese	Other	Yellow	Bob's Food
Sour Candy	Candy	Yellow	Mike's Candy
Dirt	Other	Brown	Farmer Brown
Chocolate Bar	Candy	Brown	Mike's Candy

Search 1

1. Enter `Yellow` in the product keyword search, and then click **Search**. The product selection page shows every record containing a Yellow value: Sweet Candy, Sour Candy, Chocolate Coins, Banana, and Cheese.

2. Open the product filter, enter `Mike's Candy` in the Producer search box, and then apply the search. This process applies the search filter on your product keyword search results, showing only Sweet Candy and Sour Candy.

Search 2

1. Set your search filter's food type to Candy, and then apply. The results are Chocolate Coins, Sweet Candy, Sour Candy, and Chocolate Bar.
2. Enter `Yellow` in the product keyword search, and then click **Search**. This process separates your results into Chocolate Coins, Sweet Candy, and Sour Candy.

Search 3

1. Enter `Yellow` in Product Search. Don't click Search.
2. Add filter values of Type = Candy, and then apply. Because you didn't commit to the product search, Salesforce CPQ considers only the search filter values: Chocolate Bar, Chocolate Coins, Sweet Candy, and Sour Candy.

Search 4

1. Set your filter to Producer = Mike's Candy, and then apply.
2. Enter `Yellow` in Product Search, and then click **Search**. The results are Sweet Candy and Sour Candy.
3. Clear your filter
4. Return to the product keyword search, which still contains Yellow, and then apply the search. Because you're no longer considering any filters, you'll see results for Chocolate Coins, Sweet Candy, Sour Candy, Cheese, and Bananas.

Group Product Selection by Field

EDITIONS

Available in: Salesforce CPQ Winter '17 and later

Configure the Product Selection page to group products into dropdown lists organized by shared field values. This layout helps organize the Product Selection page for sales reps and is especially useful if your company has a large product catalog.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Find the Salesforce CPQ package, and then select **Configure**.
3. Click the **Additional Settings** tab.
4. From Product Results Group Field Name, choose the field you want to group your product search results by.

When Product Results Group Field Name has a value, the Product Selection page shows the organized lists on initial loading. It also revises the grouping based on product search results when the sales rep enters a value in the Search Products toolbar.

Use Lookup Fields in the Quote Line Editor

EDITIONS

Available in: All Salesforce CPQ Editions

Add a lookup field to your quote lines and use it in the quote line editor to associate your quote line with another record. You can also customize the fields that appear in the lookup field's record search box.

As of Salesforce CPQ Summer '18, all lookup fields used in CPQ Visualforce pages require a Lookup fieldset on the object they target. This fieldset contains the fields that appear in the lookup field's search results window.

1. Add your lookup field to your quote line.
   a. From the quote line's management page, go to Custom Fields & Relationships and click **New**.
   b. On the New Custom Field page, click **Lookup Relationship** and then click **Next**.

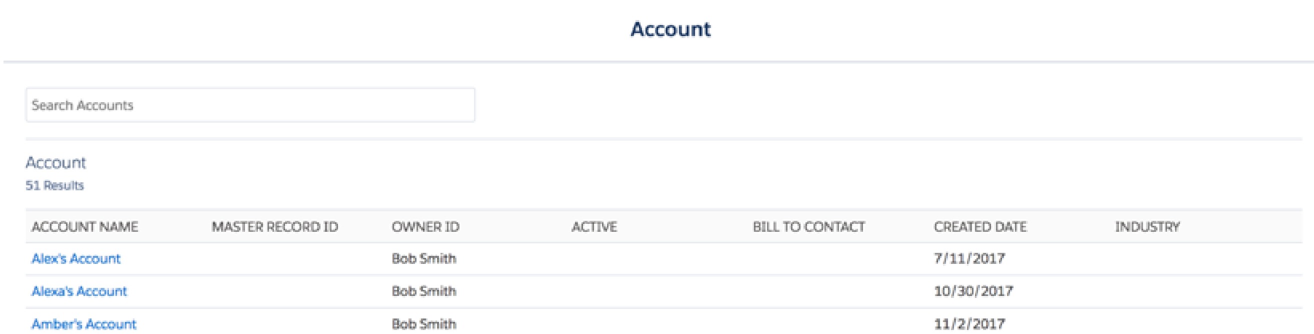
c. Choose the object that your quote line lookup field relates to.
d. Give your lookup field a name, then add a description and help text if needed.
e. Choose your field-level security.
f. Make sure Add Field is selected for the quote line layout.
g. Add custom related lists if needed, then click **Save**.

2. Add the lookup field to your quote line's Line Editor field set.
   a. From the Quote Line management page, go the Field Sets related list, then find the Line Editor field set and click **Edit**.
   b. Add your lookup to the field set.
3. Add your lookup fieldset to your lookup target object.
   a. From your target object's management page, go to the Field Sets related list and click **New**.
   b. Give your fieldset a label name of CPQ_Lookup.

   Important: You can change the field set name , but the label must always be CPQ_Lookup.

   c. Go to your object's Field Sets related list, then find CPQ_Lookup and click **Edit**.
   d. Add the fields that you want to appear in the lookup field's search results window. By default, the window always shows the master record ID and Owner ID.
4. Use your lookup field in the quote line editor.
   a. In the quote line editor, find your lookup field on any of your quote lines and click the Pencil icon.
   Salesforce CPQ shows the lookup search box.
   b. Enter your search term, then hit Enter. To search for all available records, leave the search box blank and hit Enter.
   Salesforce CPQ shows the lookup search results box. The box contains a list of records that match your search input. Each result also shows values for the fields you added to the Lookup fieldset in Step 3.

   Here's an example of a lookup result page for an Account lookup field. The account's Lookup fieldset contains the Account Name, Active, Bill To Contact, Created Date, and Industry fields.



Guidelines for Cloning Quote Lines

You can clone a product in the line editor and reconfigure it before finalizing your quote.

Select a quote line's clone icon to create a copy of the line below the original line. The cloned line maintains all the field values and configurations of the original line. You can change those configurations if you need to.

EDITIONS

Available in: **All** CPQ Editions

Clone to Groups

You can also clone one or more products from a quote line group or solution group directly to another. Select **Enable Multi Line Delete** in your line editor package settings to enable this feature.

To clone between groups, select the checkbox for at least one line in a group, and then select the clone icon for any of the selected lines. Click **Clone** to show a modal where you can choose any number of groups to clone your selected lines into.

Bundles and MDQ products maintain their structures when cloned between groups.

Quote Line Editor Drawers

EDITIONS

Available in: Salesforce CPQ **Spring '17** and later

Organize excess line editor fields in collapsible drawers shown under each quote line.

If your quote line editor has a large field set and you want to organize the editor layout, place certain fields in a collapsible drawer below each line item. This feature removes the need for horizontal scrolling and lets you see all fields related to a quote line in one view.

Add the fields you want collapsed to the Quote Line's Standard Line Item Drawer field set. All fields in this set appear in drawers under each quote line. You can have any number of drawers open or closed simultaneously and edit fields as needed in each drawer.

To view a Standard Product line's drawer, click the arrow icon on the far-right side of the quote line. Select the table header arrow to collapse all line item drawers for that table.

Any rich text editor fields in Standard Line Item Drawer appear immediately below the drawer's Details header. They appear in the same order as in the field set.

Guided Selling

EDITIONS

Available in: Salesforce CPQ Summer '15 and later

Create a prompt that asks sales reps about the types of products they want when they're adding products to a quote. Salesforce CPQ reviews their answers and shows the Add Products page with a list of products that match their responses. We call this process "guided selling."

Create a guided-selling process with the Quote Process object and add it to your quote or quote line group's Quote Process field. The Guided Selling prompt appears when you click **Edit Quote Lines** for the first time on that quote. It also appears when you click **Add Products** in the quote line editor or within a quote line group.

You can also let your sales reps select the prompt they want to use from a picklist in the quote line editor.

A guided-selling process contains these components.

- Quote Process: This object defines how the prompt appears and how it adds items based on user input.
- The quote process record contains a related list for process inputs. These records are the questions and possible answers that the guided selling prompt shows. Each process input represents one question.
- The process input record contains a related list for process input conditions. You can define process input conditions so that the guided selling prompt only shows the process input only in response to the values of other process inputs. This feature is useful if you want to create a complex guided selling prompt that guides users down several paths based on their needs. It also keeps your guided selling prompt organized by showing only required questions.

Let's have a look at important fields for each of these objects.

Quote Process Fields

Default
Select if you're offering multiple quote processes in a picklist and want this process to appear as the default selection.

Auto Select Product?
If your guided selling prompt returns only one product, Salesforce CPQ adds it to the quote.

Guided Only
Users can search for and add products only through the guided-selling prompt.

Product Configuration Initializer
Lookup to a custom Visualforce page that sets bundle options to true or false. Salesforce CPQ applies the initializer to any bundle product that the guided-selling prompt filters for selection.

Sort Order
Define the position of this quote process in your quote process picklist. Use this field only if your quote has multiple quote processes.

Process Input Fields

Label
Define the question that your prompt shows to users.

Input Field
Salesforce CPQ evaluates this field to determine the possible answers that users can select. If the field is a picklist, the process input's selectable values match your picklist's values. For any other type of field, Salesforce CPQ shows a text box below the process input question.

Product Field
Salesforce CPQ evaluates how this field's value compares to the user's answer to this process input relative the operator field.

Operator
Define how Salesforce CPQ compares a user's answer to the value of your product field. If the comparison is true, Salesforce CPQ shows the product on the Add Products page when the user completes the guided-selling prompt.

Conditions Met
Define whether any or all your process input conditions must evaluate to true for Salesforce CPQ to show matching products on the Add Products page. Use this field only if you're using process input conditions on this quote process.

Process Input Condition Fields

Process Input
The process input that appears in response to this condition.

Master Process Input
The values of this process input determine whether this process input condition evaluates to true.

Value
Select a possible value for your master process input. Salesforce CPQ evaluates this value in relation to your Operator field. If the evaluation is true, this process input condition evaluates to true.

Operator
Define how Salesforce CPQ evaluates your master process input's value.

Create a Quote Process for Guided Selling

Create a quote process to store setup information for your guided selling prompt.

Guided Selling: Basic Example

Create a basic guided-selling prompt to help sales reps select a product from multiple options.

Guided Selling: Advanced Example

Use process input conditions to create multiple paths through a guided selling prompt. This feature is useful for building detailed guided-selling prompts that cover several business needs. This use case contains an example of a guided-selling setup driven by process input conditions.

Create a Quote Process for Guided Selling

Create a quote process to store setup information for your guided selling prompt.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

1. Create your quote process record.
2. Define all the questions that the prompt asks your sales reps. Create a process input for each of these questions.
3. If you want a question to appear based only on the response to another question, create a process input condition on the question you want controlled.
4. Copy the ID section of your quote process record's URL. Paste this value into the Quote Process ID field on the quote or quote line group that shows your guided-selling prompt. You can also make a workflow rule to automatically associate the record ID to the Quote Process ID field.
   When you open your quote for the first time or edit it, the Quote Process ID triggers the displaying of the guided selling prompt.

Guided Selling: Basic Example

Create a basic guided-selling prompt to help sales reps select a product from multiple options.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Your client sells natural-fiber fabrics of various shapes and sizes. The client's product catalog contains three fabrics, sold in various widths and lengths. Sales wants a streamlined user interface that reduces the time needed to choose the correct type of product. A guided-selling process lets sales reps filter products by fabric type, width, and length, rather than manually select from a list of 27 products.

Fabric Types
Wool, linen, and silk

Widths
5 ft, 10 ft, and 15 ft

Lengths
20 ft, 40 ft, and 60 ft

1. First, make sure that your products have fields that the guided selling prompt can filter through. Create picklist fields on each fabric product to store the values for the attributes you want to filter by. Make a Fabric Type field, a Width field, and a Length field. Each field has picklist values that match all the options for that field. For example, your Fabric Type field has picklist values for Wool, Linen, and Silk.
2. To store your process inputs, create a quote process record. Because you're using only one prompt and keeping it in the quote line editor, create one quote process record and give it a descriptive name. Next, create your process inputs as follows.

Input Name	Active	Label	Display Order	Input Field	Product Field	Operator
Fabric Type	Selected	Pick your fabric type	1	fabric_type__c	fabric_type__c	equals

Input Name	Active	Label	Display Order	Input Field	Product Field	Operator
Width	Selected	Pick your fabric width	2	length__c	length__c	greater or equals
Length	Selected	Pick your fabric length	3	width__c	width__c	greater or equals

3. Associate the record ID of your quote process with your quote or quote line group's Quote Process ID field.

Guided Selling: Advanced Example

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Use process input conditions to create multiple paths through a guided selling prompt. This feature is useful for building detailed guided-selling prompts that cover several business needs. This use case contains an example of a guided-selling setup driven by process input conditions.

A manager for an IT solutions company wants a guided selling prompt that lets their sales reps define the business solution, server types, deployment options, and commercial segment of their customers. The answers filter their product based on several of the company's custom product fields.

- Business Solution
- Server Replacements
- Deployment Options
- Commercial Segment
- Employees

The prompt follows these paths.

- The prompt always asks "What business problem are you solving?" and "How many employees?"
- If the sales rep responds to "What business problem are you solving?" by selecting "Consolidate IT Assets," the prompt asks "What server types?"
- If the sales rep responds to "What business problem are you solving?" by selecting "Manage Time & Expenses," the prompt shows "Deployment options" and "Commercial segment."

Before you make your guided selling record, create the following custom picklist fields and their values on your product2 object. The Employees field exists as a standard field on your account object. Set their values on your account and products based on how you want your guided selling prompt to filter them.

Business Solution (Business_Solution__c)

Consolidate IT Assets

Manage Time and Expenses

Staff Augmentation

Server Replacements (Server_Replacements__c)

Application

Database

File

Web

Deployment Options (Deployment_Options__c)

Cloud

On-Premise

Commercial Segment (Commercial_Segment__c)

SMB

Enterprise

Public Sector

You can use process input conditions to show “Deployment options” and “Commercial segment” based on responses to the business solution question. Let’s review all the objects you need to create this guided-selling prompt.

Because you’re using only one prompt and keeping it in the quote line editor, create a quote process record and give it a descriptive name. Next, create your process inputs.

Input Name	Label	Display Order	Input Field	Product Field	Operator
Business Solution	What business problem are you solving?	1	Business_Solution__c	Business_Solution__c	equals
Server Types	What server types?	2	Server_Replacements__c	Server_Replacements__c	equals
Deployment Options	Deployment Options	3	Deployment_Options__c	Deployment_options__c	equals
Commercial Segment	Commercial Segment	4	Commercial_Segment__c	Commercial_Segment__c	equals
Employees	How many employees?	2	Employees	Employees__c	N/A

You can have the same display order values for multiple processes. If a process input condition hides one of those processes, Salesforce CPQ shows it above the unhidden process after the prompt meets the condition’s requirements.

You also need process input conditions for your Server Types, Deployment Options, and Commercial Segment process inputs. Go to each of those process input records, click **New Process Input Condition**, and then create the condition as follows. Remember, the Employees process input doesn’t need a condition because you want it to always appear in your prompt.

Process Input	Process Input Condition Name	Master Process Input	Operator	Equals
Server Types	Consolidate IT Assets	Business Solution	equals	Consolidate IT assets
Deployment Options	Manage Time and Expenses	Business Solution	equals	Manage Time and Expenses
Commercial Segment	Manage Time and Expenses	Business Solution	equals	Manage Time and Expenses

Your master process input updates its Process Inputs Regulated related list with lookups to all the process inputs it controls.

Your quote process ID is the string of numbers and letters following the final backslash of your quote process record’s URL. Copy that and add it to your quote or quote line group’s Quote Process ID field.

Show Product Image Fields in the Quote Line Editor

If your product record contains a custom image field, you can show that image within any of that product's quote lines in the quote line editor.

EDITIONS

Available in: All Salesforce CPQ Editions

1. From the object management settings for quote lines, go to Field Sets.
2. Find the Line Editor label and click **Edit**.
3. Add your custom image field to the Line Editor field set.

Add Fields to the Quote Line Editor Field Set

Add fields to quote line's line editor field set so that they display at the top of the quote line editor. Your sales reps can edit those fields and save or calculate the quote to apply the field across all the quote's quote lines.

EDITIONS

Available in: All Salesforce CPQ Editions

1. From Setup, enter `Objects`, and then click **Objects**.
2. Click **Quote Line**.
3. From the Field Sets related list, find Line Editor, and then click **Edit**.
4. Add or remove fields from the field set.

Important: The quote line editor's field section shows only the first eight fields listed in your field set. You can add more fields to the field set, but they won't appear in the quote line editor.

Large Quote Experience

Configure the quote line editor so you can quickly navigate through quotes with many list items.

EDITIONS

Available in: Salesforce CPQ **28.0** and later.	Service Cloud users need the Salesforce CPQ Service Cloud Integration package **4.0** or later.

Select **Enable Large Quote Experience** in your line editor package settings to begin. When you enable this feature, Salesforce CPQ changes your quote line editor display so large quotes are easier to navigate.

- Scroll down quote lines infinitely instead of moving between pages.
- The quote line editor shows one group at a time in the main display. Select a different group from the Groups sidebar.
- MDQ price dimensions, and the segmented and standard product tables appear as tabs.
- Subtotals and summary rows are locked in place at the bottom of the quote line editor.
- Click the Expand Page icon to expand the quote line editor across your display page. Click the Escape or the Expand Page icon to return to standard view.
- Standard and segmented table headers are locked in one place at the top of the page. That way, you don't lose your point of reference when scrolling through a list of line items.

Dragging and dropping quote line items isn't available when Large Quote Experience is enabled.

Large Quote Performance Settings

Improve line editor performance for large quotes by using the Large Quote Threshold and Quote Batch Size package settings.

EDITIONS

Available in: Salesforce CPQ Spring '17 and later

Quote Batch Size

Salesforce CPQ saves and loads quotes by batches of quote lines. The line editor package setting Quote Batch Size controls the number of lines in a batch. When this field is blank, Salesforce CPQ uses the default batch size of 150 quote lines. However, you can edit that value. A smaller batch size is less likely to hit a governor limit. A larger batch size leads to better quote line editor performance because the editor makes fewer round trips.

We recommend keeping this value from 100 to 400. If you use complex or long-running triggers for batches greater than 400, you can hit governor limits.

Large Quote Threshold

Line editor package settings also provide the large quote threshold setting, which can contain a user-defined number. Quotes with line counts above that number send only essential quote lines, rather than every quote line on that quote, during UI calls. Salesforce CPQ also ignores quote-scoped product rules for that quote.

This setting has a null default value, but you can increase it to improve quote line editor performance if you have large quotes. Plan on adjusting your large quote threshold value when you start encountering governor limits. We recommend that your value is slightly lower than the number of lines on your quote when you start to hit the limits. For example, if you encounter governor limits at a batch size of 450 lines, you can set the Large Quote Threshold batch size to 420 lines. The difference ensures that Salesforce CPQ uses the threshold even if several items are removed from your quote. Most customers encounter governor limits at a batch size of 500 quote lines.

Salesforce CPQ sends only essential lines while the large quote threshold is active. A line is essential when it's directly relevant to the action being performed, such as the following.

- If you're reconfiguring a bundle, only the lines within that bundle are essential.
- If you're desegmenting an MDQ product, only lines that represent segments of that product are essential.
- If you're upgrading assets, only lines that actually represent assets are essential.
- If you're adding products, no quote lines are essential. Quote-scoped product rules don't function in this scenario.

If you don't have quote-scoped product rules targeting your quote, you can set the large quote threshold to 1 without any issue. If your quote contains such rules, we recommend working with your partner to identify workarounds. For example, you can convert your quote-scoped product rules into field-level validations, triggers, and other types of platform customization.

Quote Line Fields

Quote lines store information about products that a sales rep has quoted. With certain page layout and field-level security settings, some fields aren't visible or editable.

EDITIONS

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Additional Discount	SBQQ__AdditionalDiscount__c	Formula (Currency)	Total additional discounts extended to this line item. Additional discount is defined as discount extended on top of volume discount or negotiated prices.
Additional Discount (%)	SBQQ__Discount__c	Percent(9, 2)	Additional customer discount extended to this line item

Field	API Name	Data Type	Definition
			expressed in form of a percentage.
Additional Discount (Amount)	SBQQ__AdditionalDiscountAmount__c	Currency(12, 2)	Additional customer discount extended on this line item in the form of an absolute amount.
Additional Quantity	SBQQ__AdditionalQuantity__c	Number(10, 2)	Additional Product quantity that contributes to volume discount calculations
Allow Asset Refunds	SBQQ__AllowAssetRefund__c	Checkbox	Indicates whether the underlying asset may have its quantity refunded. Only relevant for Amendments.
Batch Quantity	SBQQ__BatchQuantity__c	Number(10, 2)	If products are sold in batches, this stores the quantity in each batch, defaulted from the product.
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Defines the billing frequency. - One-Time - Monthly - Quarterly - Semiannual - Annual - Usage
Block Price	SBQQ__BlockPrice__c	Lookup(Block Price)	Assign a fixed price to a product based on quantity and quantity range. This overrides the automatic calculation of quantity * unit price.
Bundled	SBQQ__Bundled__c	Checkbox	The product on this line item is part of a bundle product on this quote. Bundled lines items have a zero price and do not allow price or quantity to be edited.
Carry-Over Line	SBQQ__CarryoverLine__c	Checkbox	Denotes this line as an auto-mapped option on an Upgraded Bundle.
Component Cost	SBQQ__ComponentCost__c	Currency(14, 2)	Total cost of components in this bundle.

Field	API Name	Data Type	Definition
Component Discounted By Package	SBQQ__ComponentDiscountedByPackage__c	Checkbox	Fixes additional discount for this component to the parent bundle discount.
Component List Total	SBQQ__ComponentListTotal__c	Currency(14, 2)	List total of components in this configuration. This field is only populated if this line item references a configurable product.
Component Net Total	SBQQ__ComponentTotal__c	Currency(14, 2)	Net total of components in this configuration. This field is only populated if this line item references a configurable product.
Component Percent of Total Scope	SBQQ__ComponentSubscriptionScope__c	Picklist	Subscription scope set at the component level. This field overrides the subscription scope copied from the product. - Package - Components - Both
Component Uplifted By Package	SBQQ__ComponentUpliftedByPackage__c	Checkbox	Fixes uplift for this component to the parent bundle uplift. Uplift only applies to multi-segmented products.
Component Visibility	SBQQ__ComponentVisibility__c	Formula (Text)	Indicates that the visibility of the component line item.
Compound Discount (%)	SBQQ__CompoundDiscountRate__c	Percent(5, 3)	Discount rate compounded by quantity (historic).
Configuration Required	SBQQ__ConfigurationRequired__c	Checkbox	Flag that marks this quote line as requiring configuration. Can be used by custom code to request that this product be reconfigured.
Contracted Price	SBQQ__ContractedPrice__c	Lookup(Contracted Price)	Contracted price if the product has negotiated pricing for opportunity's account. Contracted Prices are available on the Account and can be applied to any product in any price book.

Field	API Name	Data Type	Definition
Cost	SBQQ__Cost__c	Lookup(Cost)	Cost record for this line item.
Cost Editable	SBQQ__CostEditable__c	Checkbox	Specifies whether cost can be edited on this line item.
Customer Total	SBQQ__CustomerTotal__c	Formula (Currency)	Customer total price for this quote line item. This is the Net Total excluding any partner discounts.
Customer Unit Price	SBQQ__CustomerPrice__c	Currency(12, 2)	Customer unit price for the product quoted by this line item. This is the Net Unit Price excluding any partner discounts.
Default Subscription Term	SBQQ__DefaultSubscriptionTerm__c	Number(5, 0)	Term length of the subscription, which only applies if the product is a subscription. It is copied from the Subscription Term of the related product when the line item is first generated.
Description	SBQQ__Description__c	Rich Text Area(32000)	Description for this line item.
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup(Discount Schedule)	Specify discounts in terms of % or Amt to be discounted off the product's price using quantity purchased or term. Set quantity/term ranges in tiers of different discount %. Discount is applied to List Price & resulting total is stored in the Regular Price
Discount Schedule Type	SBQQ__DiscountScheduleType__c	Picklist	Discount schedule type. Copied from Type field in associated discount schedule. Must be a stored value because it is used in roll-up formula fields. - Range - Slab
Discount Tier	SBQQ__DiscountTier__c	Lookup(Discount Tier)	Discount tier used by this line item. This field is only populated if a product is volume discounted and discount schedule is of type "Range."

Field	API Name	Data Type	Definition
Distributor Discount	SBQQ__DistributorDiscount__c	Percent(3, 2)	This is a discount that is applied to partner price and reflected in the net price.
Dynamic Option ID	SBQQ__DynamicOptionId__c	Text(40)	Contains feature ID and product ID to identify the feature and optional SKU associated with this line.
Effective End Date	SBQQ__EffectiveEndDate__c	Formula (Date)	Effective end date for this subscription.
Effective Quantity	SBQQ__EffectiveQuantity__c	Formula (Number)	Effective quantity used in computing totals. Same as quantity unless the product is block-priced, covered by "Slab" discount schedule, or an existing subscription. For amendment quotes, this field is equal to (Quantity) - (Prior Quantity)
Effective Start Date	SBQQ__EffectiveStartDate__c	Formula (Date)	Effective start date for this subscription.
End Date	SBQQ__EndDate__c	Date	Date the service represented by this line item ends (only applies if product is a subscription).
Existing	SBQQ__Existing__c	Checkbox	Indicates that the customer already owns this product. This is typically used for products with options during add-on quoting. The product is on the quote solely to drive the Configurator.
Favorite	SBQQ__Favorite__c	Lookup(Favorite)	Favorite to which this Quote Line belongs.
Generate Contracted Price	SBQQ__GenerateContractedPrice__c	Picklist	Generates a contracted price based on the adjusted quote line if flagged. - Yes - No
Gross Profit	SBQQ__GrossProfit__c	Currency(14, 2)	Gross profit amount on this line item.

Field	API Name	Data Type	Definition
Group	SBQQ__Group__c	Lookup(Quote Line Group)	Group to which this line belongs, if any.
Hidden	SBQQ__Hidden__c	Checkbox	Denotes whether this line item is hidden in generated PDF documents.
Incomplete	SBQQ__Incomplete__c	Checkbox	Flag set internally by application logic when a line is saved to an incomplete database. This may happen when price rules are evaluated. Test this field in validation rules to avoid them firing prematurely. Do NOT add to page layout or otherwise update.
List Total	SBQQ__ListTotal__c	Formula (Currency)	Quantity * List Unit Price
List Unit Price	SBQQ__ListPrice__c	Currency(12, 2)	By default, List Unit Price inherits this Product's Pricebook entry, unless a Special Price Type is defined.
Markup	SBQQ__Markup__c	Formula (Currency)	Markup amount on this item. This value is automatically calculated by applying markup rate or absolute amount to the product cost.
Markup (%)	SBQQ__MarkupRate__c	Percent(6, 2)	Markup on this line item expressed as a percentage.
Markup (Amount)	SBQQ__MarkupAmount__c	Currency(14, 2)	Markup amount for this line item.
Maximum List Unit Price	SBQQ__MaximumPrice__c	Currency(14, 2)	Maximum unit price for this product. Used to enforce list price ceiling for products with dynamically calculated prices.
Minimum List Unit Price	SBQQ__MinimumPrice__c	Currency(18, 0)	Minimum list unit price for this product. Used to enforce list price floor for products with dynamically calculated list prices.
Net Total	SBQQ__NetTotal__c	Formula (Currency)	Net total price for this quote line item.

Field	API Name	Data Type	Definition
Net Unit Price	SBQQ__NetPrice__c	Currency(12, 2)	Net unit price for the product quoted by this line item.
Non Discountable	SBQQ__NonDiscountable__c	Checkbox	Marks this line item as non-discountable.
Non Partner Discountable	SBQQ__NonPartnerDiscountable__c	Checkbox	Select the checkbox to make this line item non-discountable for partners.
Number	SBQQ__Number__c	Number(5, 0)	Number indicating this line's position within its group or quote.
Optional	SBQQ__Optional__c	Checkbox	Marks this line as optional. Optional line items don't contribute to quote totals and are not transferred to the Opportunity.
Option Discount (%)	SBQQ__OptionDiscount__c	Percent(3,2)	If this line is for an optional SKU, this field captures any discount given to the bundle and extended to the option.
Option Discount (Amount)	SBQQ__OptionDiscountAmount__c	Currency(10,2)	Discount extended on this product because it's part of a bundle.
Option Level	SBQQ__OptionLevel__c	Number(5,0)	Indicates nest level of this option (only applies to lines that are were generated from options).
Option Type	SBQQ__OptionType__c	Picklist	Indicates that the Option Type, which is copied from related Product Option. Determines how quantity is calculated. - Component - Accessory - Related Product
Original Price	SBQQ__OriginalPrice__c	Currency(12,2)	The original unit price for the product quoted by this line item. Original Price originates from the price book. Also known as MSRP.
Original Quantity	SBQQ__BundledQuantity__c	Number(10,2)	For items with calculated quantities, this field holds the original (user-entered) quantity.

Field	API Name	Data Type	Definition
Original Unit Cost	SBQQ__OriginalUnitCost__c	Currency(14,2)	Cost for one unit of product quoted on this line item if Cost Schedules were not applied.
Package	SBQQ__Bundle__c	Checkbox	Indicates whether this line item represents a bundle; meaning, it includes other line items in this quote.
Package Cost	SBQQ__PackageCost__c	Formula(Currency)	Total cost for this bundle including the cost of its components.
Package List Total	SBQQ__PackageListTotal__c	Formula(Currency)	Total list price of this bundle including its components.
Package Product Code	SBQQ__PackageProductCode__c	Text(255)	Product code for the bundle. Salesforce CPQ generates this code by appending codes of selected components according to a user-specified pattern.
Package Product Description	SBQQ__PackageProductDescription__c	Rich Text Area(32000)	Dynamic Product Description generated from the components inside this bundle.
Package Total	SBQQ__PackageTotal__c	Formula (Currency)	Total price of this bundle including its components.
Partner Discount	SBQQ__PartnerDiscount__c	Percent(3, 2)	If your organization sells through a channel/VARI, a Partner Discount on a quote or individual product line item can be given. Partner discounts are applied after all automatic and discretionary discounts. The Partner Discount is taken into effect in the Partner Price.
Partner Total	SBQQ__PartnerTotal__c	Formula (Currency)	Total of the Partner Discount. By default, partner discounts are applied after all automatic and discretionary discounts. The partner discount is taken into effect in the Partner Price.
Partner Unit Price	SBQQ__PartnerPrice__c	Currency(12, 2)	Partner unit price. Price after partner discount but before distributor discount.

Field	API Name	Data Type	Definition
Percent of Total (%)	SBQQ__SubscriptionPercent__c	Percent(4, 3)	Percent of non-subscription product total to use when calculating this line item price.
Percent of Total Base	SBQQ__SubscriptionBase__c	Text(30)	Determines the price that serves as the base for percent-of-total calculations.
Percent of Total Category	SBQQ__SubscriptionCategory__c	Picklist	Category defined on the product to limit percent-of-total calculations to certain products. Copied from the product record.
Percent of Total Scope	SBQQ__SubscriptionScope__c	Picklist	Indicates how dynamic subscription prices are calculated: Quote uses all the non-subscription products in the quote while Group uses only non-subscription products in the same group. - Quote - Group
Percent of Total Target Price	SBQQ__SubscriptionTargetPrice__c	Currency(12, 2)	Price of the subscription target product on which maintenance should calculate.
Previous Segment Regular Price	SBQQ__PreviousSegmentPrice__c	Currency(12, 2)	When set, this value takes the place of the previous segment's regular price when calculating Uplift for this segment.
Previous Segment Uplift	SBQQ__PreviousSegmentUplift__c	Currency(10, 2)	When set, this value takes the place of the previous segment's uplift amount when calculating Uplift for this segment.
Price Dimension	SBQQ__Dimension__c	Lookup(Price Dimension)	Dimensions within an MDQ Product that all each segment to be priced independently. Each Product may contain several Price Dimensions. Yearly Price Dimensions are treated as Subscriptions.
Price Editable	SBQQ__PriceEditable__c	Checkbox	Flag that indicates if price is editable for this line item.

Field	API Name	Data Type	Definition
Pricing Method	SBQQ__PricingMethod__c	Picklist	Indicates how the price for this line item is calculated. "List" = subtracting discount from list price. "Cost" = adding markup to cost. - List - Cost - Block - Custom
Pricing Method Editable	SBQQ__PricingMethodEditable__c	Checkbox	Specifies whether pricing method can be edited on this line item.
Prior Quantity	SBQQ__PriorQuantity__c	Number(10, 2)	Combined quantity of this product from prior purchases.
Product	SBQQ__Product__c	Lookup(Product)	Product quoted by this line item.
Product Code	SBQQ__ProductCode__c	Formula (Text)	Code for the product referenced by this line.
Product Family	SBQQ__ProductFamily__c	Formula (Text)	How you would categorize/group/organize this within Salesforce (whether it's a new or existing Product Family). Also, this field can be used during product selection to filter to the correct product or product SKU.
Product Name	SBQQ__ProductName__c	Formula (Text)	Name for the product referenced by this line item.
Product Option	SBQQ__ProductOption__c	Lookup(Product Option)	Product option that generated this line (if any).
Product Subscription Type	SBQQ__ProductSubscriptionType__c	Picklist	Determines the quote line's default subscription type. By default, this field is mapped from the product. For any legacy quote line, this field will be null. The admin should set the page layout.
Prorated List Price	SBQQ__ProratedListPrice__c	Currency(16, 2)	Prorated list unit price.
Prorated Unit Price	SBQQ__ProratedPrice__c	Currency(12, 2)	Prorated price for the product quoted by this line item. This

Field	API Name	Data Type	Definition
			price only differs from Special Price if the product is a subscription and the line item is being prorated.
Prorate Multiplier	SBQQ__ProrateMultiplier__c	Number(4, 4)	Calculated ratio used to compute Prorated Price.
Quantity	SBQQ__Quantity__c	Number(10, 2)	Quantity being quoted.
Quote	SBQQ__Quote__c	Master-Detail(Quote)	Quote to which this line item belongs.
Regular Total	SBQQ__RegularTotal__c	Formula (Currency)	Unit price before additional discount multiplied by quantity.
Regular Unit Price	SBQQ__RegularPrice__c	Currency(12, 2)	Unit price before additional discount.
Renewal	SBQQ__Renewal__c	Checkbox	Indicates that this line item represents a product being renewed. Only non-subscription products for quote type "Renewal" has this field set to true. Under normal circumstances, this field should not be modified via UI.
Renewed Asset	SBQQ__RenewedAsset__c	Lookup(Asset)	Asset being renewed if this line item represents product renewal.
Renewed Subscription	SBQQ__RenewedSubscription__c	Lookup(Subscription)	The subscription that this quote line is renewing.
Required By	SBQQ__RequiredBy__c	Lookup(Quote Line)	Links this line to another line in the same quote whose product requires this line's product.
Segment Index	SBQQ__SegmentIndex__c	Number(2, 0)	For multi-segmented Products, Index representing this Quote Line's position in the segment table.
Segment Key	SBQQ__SegmentKey__c	Text(30)	For multi-segmented Products, this is a shared key used to group multi-dimensional Quote Lines together.
Segment Label	SBQQ__SegmentLabel__c	Text(25)	For multi-segmented Products, this is the Column header label

Field	API Name	Data Type	Definition
			(for example, "Year 1") associated with this line.
Source	SBQQ__Source__c	Lookup(Quote Line)	Source of cloned quote line.
Special Price	SBQQ__SpecialPrice__c	Currency(12, 2)	If the Special Price Type field has a value, special price replaces list price as the starting point in the quote line price calculation sequence. • If special price type = Contract, your special price uses the value of the current contracted price record active for the account associated with your quote. Remember that the contracted price uses either a price or a discount. If it uses a price, your special price inherits that value directly. If it uses a discount, Salesforce CPQ applies that discount to your product's list unit price and sends the result to your special price. • If special price type = Custom, admins can provide their own value in the special price field. Salesforce CPQ uses special price as the initial starting point in quote line price calculation, however, the quote line still maintains a value for list unit price. If Special Price Type has a null value, the special price inherits the value of list unit price. However, Salesforce CPQ won't use special price in quote line price calculation.
Special Price Description	SBQQ__SpecialPriceDescription__c	Text(80)	Name of the Discount Tier or Contacted Price applied to achieve the special price for this line item.

Field	API Name	Data Type	Definition
Special Price Type	SBQQ__SpecialPriceType__c	Picklist	Stores the type of special price offered on this line item. Null value indicates that there is no special pricing. Under normal circumstances, this field should not be modified via UI.
Start Date	SBQQ__StartDate__c	Date	Date the service represented by this line item will begin (only applies if the product is a subscription).
Subscribed Asset IDs	SBQQ__SubscribedAssetIds__c	Long Text Area(19000)	Comma-separated list of asset IDs covered by this subscription line. Only applicable to renewal quotes. Do not update unless instructed.
Subscription Pricing	SBQQ__SubscriptionPricing__c	Picklist	Determines how the subscription on this line item is priced. A blank value means that this line contains product that's not a subscription. - Fixed Price - Percent of Total
Subscription Term	SBQQ__SubscriptionTerm__c	Number(5, 0)	Term for the subscription product in this line. If the product is not a subscription this value has no effect.
Subscription Type	SBQQ__SubscriptionType__c	Picklist	Determines the contract's pricing and process. By default, this field is mapped from the product. For any legacy quote line, this field value will be null. For a new quote line, the value will be conditionally mapped from the default subscription type. The conditional picklist values are: default subscription type = One-Time and available subscription type = One-Time, default subscription type = Renewable and available subscription type = Renewable, default subscription type =

Field	API Name	Data Type	Definition
			Renewable/Evergreen and available subscription type = Renewable or Evergreen, and default subscription type = Evergreen and available subscription type = Evergreen.
Taxable	SBQQ__Taxable__c	Checkbox	Indicates if this line item is taxable.
Term Discount	SBQQ__TermDiscount__c	Currency(12, 2)	Discount calculated by applying subscription term against term discount schedule.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	Schedule for discounts based on subscription term. This is useful when you want to show a breakdown of payments in separate groups, for different terms, yet you want to discount reflected for the entire duration of the subscription. Leave Term Discount Level blank if you want discount schedules applied based on the term of each line item.
Term Discount Tier	SBQQ__TermDiscountTier__c	Lookup(Discount Tier)	Tier within the term discount schedule used to discount this line item.
Total Discount (%)	SBQQ__TotalDiscountRate__c	Formula (Percent)	Total discount for this line item including volume discount, contracted discount, and additional discount.
Total Discount (Amount)	SBQQ__TotalDiscountAmount__c	Formula (Currency)	Total discount amount for this line item including volume discount, contracted discount, and additional discount.
Unit Cost	SBQQ__UnitCost__c	Currency(14, 2)	Cost for one unit of product quoted on this line item.
Unprorated Net Price	SBQQ__UnproratedNetPrice__c	Currency(14, 2)	The full term net price for individual line.
Upgraded Asset	SBQQ__UpgradedAsset__c	Lookup(Asset)	The asset that this quote line is upgrading. When the quote is contracted this asset has its

Field	API Name	Data Type	Definition
			Usage End Date populated to indicate it's retired.
Upgraded Quantity	SBQQ__UpgradedQuantity__c	Number(10, 2)	Portion of this line's Prior Quantity being upgraded to another product.
Upgraded Subscription	SBQQ__UpgradedSubscription__c	Lookup(Subscription)	The subscription that this quote line is upgrading. When the quote is contracted this subscription has its Terminated Date field populated.
Uplift	SBQQ__Uplift__c	Percent(7, 2)	Uplift is applied as a % against the previous year's price; the resulting price is entered into the Regular Price field on top of Special or Contracted Prices. Uplifts compound year after year. Uplift cannot be applied to the first Year of any Subscription.
Uplift (Amount)	SBQQ__UpliftAmount__c	Currency(10, 2)	Uplift (Amt) is measured as a currency amount. This is a system-calculated field, as Uplift can only be applied to MDQ segments in percent.
Volume Discount	SBQQ__VolumeDiscount__c	Percent(12, 2)	Discount schedules allow you to specify volume discounts based on a percentage of the product's price to be discounted using the quantity purchased or term. You can set the quantity or term ranges in tiers of different discount percentages. You can also apply discount schedules to Subscription Term.

Manage Your Bundles in the Configurator

Use the configurator to add or remove options from your bundle products. The configurator displays your bundle features and the options available within each feature. Based on certain product fields, you can enter the configurator when you add a bundle product or click Reconfigure Bundle on a bundle product quote line.

EDITIONS

Available in: **All** Salesforce CPQ Editions

Control When Sales Reps Can Configure Bundles

Change a product's configuration event to control when Salesforce CPQ allows sales reps to configure a bundle.

Choose When Sales Reps Can Configure Bundles

Change a bundle product's Configuration Type field to control when sales reps are required to configure a bundle.

Choosing When to Show the Configurator

Several product fields let you control when users can edit bundles in the configurator. Use these fields to ensure that your users have the correct amount of freedom and restrictions when configuring different bundle products.

Bundle Layout and Navigation

Several product fields let you customize how your bundle appears in the configurator and how users move between product features. Use these fields to define a layout that makes your bundle easy to navigate.

Control When Sales Reps Can Configure Bundles

EDITIONS

Available in: All Salesforce CPQ Editions

Change a product's configuration event to control when Salesforce CPQ allows sales reps to configure a bundle.

1. From the detail page for your bundle product, click **Edit**.
2. Find the Configuration Event field and choose one of the following values.
   - Always: Salesforce CPQ opens the configurator when the sales rep adds the bundle product. The quote line item always displays the configuration link as well.
   - Add: Salesforce CPQ opens the configurator when the sales rep adds the bundle product. After initial configuration, the quote line item doesn't display the configuration link.
   - Edit: Salesforce CPQ doesn't open the configurator when the sales rep adds the bundle product. However, they can select the configuration link on the quote line. This value saves time if you have a bundle that always or frequently uses its default configuration.

Choose When Sales Reps Can Configure Bundles

EDITIONS

Available in: All Salesforce CPQ Editions

Change a bundle product's Configuration Type field to control when sales reps are required to configure a bundle.

1. Go to your bundle product.
2. Select the Configuration Type field.
3. Choose one of the following values.
   - Allowed: The sales rep can configure the bundle at any point. Since they're not required to configure it, they can leave the initial configuration page without making any changes.
   - Disabled: Sales reps can't configure the bundle. Salesforce CPQ doesn't prompt them to choose options after adding the bundle product. And it doesn't show a Configure link next to the bundle's quote line item. Use this value when your bundle automatically selects options.
   - Required: The sales rep can't leave the initial configuration page until they choose at least one product option.

Example: Configuration types are useful in the following scenarios.

- Allowed: The bundle is a laptop with several configuration options. These options default to the cheapest default values (such as 8 GB of RAM instead of 16), but sales reps can upgrade to more expensive options.
- Disabled: The bundle is a laptop with only one product option available for each feature. The features have been established so sales reps can easily review the laptop's specifications.

- Required: The bundle is a laptop that has significant price and feature differences between a feature's options, such as a $500 graphics card versus none. This configuration type ensures that your sales reps are less likely to skip past option selection and configure an expensive quote in error.

Choosing When to Show the Configurator

Several product fields let you control when users can edit bundles in the configurator. Use these fields to ensure that your users have the correct amount of freedom and restrictions when configuring different bundle products.

EDITIONS

Available in: All Salesforce CPQ Editions

Configuration Type

The Configuration Type field defines when users can access the Configure Products page and whether they are required to configure certain options. Your configuration type also determines the configuration events you can choose from.

- Allowed: Salesforce CPQ directs users to enter the configurator when they perform any of the selected configuration events. In the configurator, they can change their bundle or leave without making any changes.
- Required: Salesforce CPQ directs users to enter the configurator when they perform any of the selected configuration events. In the configurator, they can change their bundle or leave without making any changes. This value performs a different function if you're configuring a nested bundle with a required configuration type. In this scenario, Salesforce CPQ displays a red vertical line next to the radio buttons or checkboxes of any required configurations that you have not yet entered. If you try to save in the configurator without configuring those options, you receive an error message.
- Disabled: Prevent the user from ever altering the bundle in the configurator. Salesforce CPQ instead uses this bundle's default product option setup when you add it to a quote.

Configuration Event

The Configuration Event field defines how users can access the Configure Products page.

- Add: Salesforce CPQ shows Configure Products only when you add a bundle product to a quote. You can't reconfigure the bundle from its quote line.
- Edit: Salesforce CPQ uses the bundle's default layout and bypasses the configuration page when you add a product. Users can then open Configure Products by clicking **Reconfigure** on the quote line.
- Always: Salesforce CPQ shows Configure Products when you add a bundle product and when you click **Reconfigure** on its quote line. This process ensures that users are aware of the bundle's configuration options when they add it to a quote and can change those options at any time.

Disable Reconfiguration

Prevent users from clicking **Reconfigure** on quote lines for this product within the Edit Lines page. Selecting this field overrides a Configuration Event field set to Edit or Always. Disabling reconfiguration is useful when you're working with nested bundles. For example, you may want to require users to configure a server maintenance bundle when it is nested within an IT support bundle. However, you also want to prevent users from reconfiguring your server maintenance bundle when they add it as a standalone bundle. In this scenario, your server maintenance bundle has a required configuration type and disabled reconfiguration.

Example: You're setting up bundle products for several of your company's laptop packages. Use the Configuration Type field to provide an ideal buying experience based on the price and options for each of your laptops.

- Your laptop bundle has a video card feature with options for no video card, a $500 video card, and a $1,000 video card. You sell primarily to enthusiast users who want the most powerful card, so the video card feature defaults to the $1,000 option. However, you want to make sure users interested in a cheaper card don't accidentally skip past option selection and configure an expensive quote in error. Set your configuration event to Always so that users see the available video cards right away. They can also change their selection at any point during the quoting process.

- Your laptop's memory feature contains options for 8 GB, 16 GB, and 32 GB. The bundle defaults to the 8-GB option, which is the cheapest, but your user can upgrade to more expensive options. You sell equal amounts of 8-GB, 16-GB, and 32-GB laptops, so you don't have a specific type of customer that you want to prioritize. You can set your configuration event to Add, Edit, or Always.
- Your laptop has only one product option available for each feature. However, you still want to show the product options in the quote line editor so your users can quickly review the laptop's specifications and price. In this case, set your configuration type to Disabled.

Bundle Layout and Navigation

EDITIONS

Available in: All Salesforce CPQ Editions

Several product fields let you customize how your bundle appears in the configurator and how users move between product features. Use these fields to define a layout that makes your bundle easy to navigate.

Option Layout

Choose how the Configure Products page groups your product features.

- Sections: The Configure Products page shows all your product features on one page.
- Tabs: The Configure Products page shows a tab for each of your product features. Users can navigate through the tabs in any order.
- Wizard: The Configure Products page shows a tab for each of your product features and arrow buttons at the bottom of the page. Users can move between features only by clicking the forward arrow or back arrow. This setup is useful if you want to ensure that users configure one feature before moving to the next feature.

Option Selection Method

Choose how Salesforce CPQ presents the product options for selection.

- Click: The bundle shows the available product options within each product feature.
- Add: The bundle shows an Add Options link at the bottom of the product feature. When users click **Add Options**, the Configure Products page shows a new page with only the available product options for that feature. Users select the product options they want to add or remove and then click **Add** to return to the bundle configuration page. This method is useful for keeping your main bundle configuration page short and organized if your features have many product options.

Product Rules

EDITIONS

Available in: **All** CPQ Editions

You can evaluate a product option, quote, or a quote line against user-made conditions and perform an action in response. Organize your conditions and actions in a product rule object.

All product rules contain related lists for Error Conditions, Actions, and Configuration Rules.

An Error Condition contains two sections: Information and Filter Information. Information defines an object, a field on an object, or a variable to test. Filter Information defines a logical operator and a value to test against. When Salesforce CPQ processes a product rule, it tests all the rule's error conditions and evaluates whether they're true or false. It then considers the rule's Conditions Met field when evaluating whether to fire an action. You can set Conditions Met so that the rule fires when:

- All error conditions are true
- Any number of error conditions are true
- The error conditions evaluate to user-determined custom logic.

All rule types require at least one Error Condition.

Your use of Actions and Configuration Rules depends on the type of product rule you're using.

Product Actions

A product action performs an action on a product option, such as selecting or deselecting the option within its bundle, or hiding the option from view. Product actions target options based on the parent product rule's scope, conditions, and evaluation event. You can also use product action fields to change the action's target scope.

CPQ Validation Rules

Validation rules confirm that a quote's product combinations or quote line field values match predetermined conditions. Users see an error message and can't save their product configuration or quote until they meet these conditions.

Alert Rules

Alert rules provide informational messages during configuration or pricing. Unlike a validation rule, alert rules let you continue and save configurations and quotes without changing anything.

Selection Rules

Set up your product rules to automatically add, remove, hide, enable, or disable options in a bundle.

Filter Rules and Dynamic Bundles

Allow your sales reps to choose their own options in a bundle. You can use filter rules to filter the options they can choose from.

Product Rule Guidelines

Consider key guidelines when you're making a product rule.

Product Actions

EDITIONS

Available in: All Salesforce CPQ Editions

A product action performs an action on a product option, such as selecting or deselecting the option within its bundle, or hiding the option from view. Product actions target options based on the parent product rule's scope, conditions, and evaluation event. You can also use product action fields to change the action's target scope.

A Product action target one or more product options in all quotes to which the parent product rule applies. You can choose either one product option or use filtering logic to apply the action to a group of products that fall within the filter. For example, you could target all products where the product name contains "US."

Important: You can use product actions on only product rules with a Type field set to Selection.

Example: An IT hardware distributor has a catalog where several products have different US and UK versions. They would like a quote setup where sales reps can choose which region's products are displayed. You can configure this beginning with the following product rule.

Product Rule

Conditions Met: All

Scope: Product

Evaluation Event: All

Type: Selection

Active: Selected

Add two product actions to this rule. These actions use filter to automatically display all product with product names containing "US" and hide all products with product names containing "UK."

Product Action 1 - Show US Products

Type: Show

Filter Field: Product Name

Operator: Contains

Filter Value: US

Product Action 2 - Hide UK Products

Type: Hide & Remove

Filter Field: Product Name

Operator: Contains

Filter Value: UK

You can then create a second rule with action that shows all UK products and an action that hides all US products. This setup has almost all the same values as your first product rule. Switch around “US” and “UK” in each action’s filter value and make sure that the product rule has a fitting name.

Product Action Fields

To create or modify a product action, enter the information in the appropriate fields. Some fields aren’t visible or editable depending on the page layout and field-level security settings.

Product Action Fields

To create or modify a product action, enter the information in the appropriate fields. Some fields aren’t visible or editable depending on the page layout and field-level security settings.

EDITIONS

Available in: All Salesforce CPQ Editions

Standard Product Action Fields

Currency

A product action considers a product for evaluation only if the product has a matching currency.

Product

The product action performs the result of the Type field on this product. This product must be optional for at least one product option. Use this field only for selection rules.

Product Action

The reference number for this product action.

Required

If you're using a selection rule with any Add value for the Type field, select this field. When the product rule fires, Salesforce CPQ selects in the quote line editor the product in the action’s Product field.

If you want to do anything that's an add action, required checkbox must be set to true. If false, those rules won't work.

Rule

The product rule that contains this product action.

Type

Use this field with selection rules and filter rules. Default Filter and Option filter control search logic for filter rules. All other values determine which action a selection rule performs on a product option.

Add

Select a product option's selected checkbox. If the product option is currently hidden, this action won't show it in the configurator.

Remove

Deselect a product option's selected checkbox. If the product option is currently hidden, this action won't show it in the configurator.

Enable

Allow users to select the checkbox for the product option.

Disable

Prevent users from choosing the product option's selection checkbox.

Enable & Add

Add a product option and allow users to choose its selection checkbox.

Disable & Remove

Deselect a product option's selection checkbox and make it unselectable.

Show

Show a product option. Its selection checkbox is unselected.

Hide

Hide a product option. While hidden, you can still use other product rules to select or deselect the product option's selection checkbox.

Show & Add

Show a product option and select its selection checkbox.

Hide & Remove

Deselect a product option's selected checkbox and hide the product option.

Default Filter

When you're using a filter rule, filtering persists even when a user removes the filtered value from the Product Search sidebar.

Optional Filter

When you're using a filter rule, Salesforce CPQ removes the filter parameters when a user removes the filtered value from the Product Search sidebar.

Filter Fields

Use filter fields to apply a selection rule or a filter rule to a filtered set of product options. You can use filter fields with selection rules to apply the selection action to only certain product options. Use filter fields with filter rules to control a list of products that appear in the product option selection page when a sales rep configures a bundle. When they select one of those products, Salesforce CPQ adds it to the bundle as a product option.

Filter Field

Choose the field that you want to filter your product options by.

Filter Value

Choose the value on your filter field for filtering your product options. For example, let's say you sold a custom laptop bundle with a feature for the laptop's case color. You could set your filter field to your product's custom Color field, your operator Equals, then set the filter value to Silver. When you configure your bundle, the case color feature would show only product options where the Color field was set to Silver.

Operator

This logical operator determines how the filter rule evaluates the filter value.

Value Attribute

If your Value Field is a global configuration attribute, use this field to select one of its attributes.

Value Field

If you're using the Value Object field, choose the field on your value object that you want to filter by.

Value Object

Use the Value Object field if you want to filter product options based on a predetermined value rather than a value that you manually set in the Filter Value field. This allows the filter rule to act like a configuration rule and filter based on a field and value that the sales rep chooses on the quote, product, or configuration attribute. For example, let's say that your quote has a Deployment Type field that the sales rep sets during quoting. If they pick a deployment type of Premium, the filter rule could evaluate your product feature so that it only shows product options that also have a Premium deployment type. In this case, you'd need deployment type fields on that feature's product options as well as their related products. You'd also need a value object set of Quote, a value field of Deployment Type, and and operator set to Equals.

CPQ Validation Rules

EDITIONS

Available in: **All** CPQ Editions

Validation rules confirm that a quote's product combinations or quote line field values match predetermined conditions. Users see an error message and can't save their product configuration or quote until they meet these conditions.

Use validation rules to ensure that your users create parts of their quote in a manner that you can control. If the quote isn't configured in this way, the quote line editor shows an error message when the user tries to save. Set the text for this error message in the product rule's Message field. The message appears, and users can't save the product configuration or quote until the product rule's error conditions evaluate to true.

Example: You want your quotes to contain more or the same quantity of toner than printers. Your product rule in this case tests whether the quantity of toner is greater than or equal to the quantity of printers on your quote. Start by creating a summary variable for your toner quantity and another summary variable for your printer quantity. Then create a product rule with the following fields.

- Product Rule Name: Toner Quantity Greater or Equal to Printer Quantity
- Conditions Met: All
- Scope: Product
- Evaluation Event: Always
- Type: Validation
- Message: Toner quantity must be greater than or equal to printer quantity.

Next, create an error condition.

- Tested Variable: Toner Quantity
- Operator: Less Than
- Filter Type: Variable
- Filter Variable: Printer Quantity

Now, if a user adds more printers than toner in the quote line editor, they see the message you set when they try to save.

Validation Rules in Nested Bundles
Use validation rules within nested bundles to expand the scope of options Salesforce CPQ considers when evaluating quotes and products.

Validation Rules in Nested Bundles

EDITIONS

Available in: Salesforce CPQ Spring '16 and later.

Use validation rules within nested bundles to expand the scope of options Salesforce CPQ considers when evaluating quotes and products.

Validation rules can evaluate children, grandchildren, or parents of the option they initially target. Control this feature with three configuration rule fields.

- Parent Bundle Condition Level

- 1: Conditions evaluate the parent of the product option that the configuration rule targets and all children of that parent. Siblings of the parent product aren't evaluated.
- None: Conditions evaluate children only. This is the default option.

- Child Bundle Condition Level
  - 1: Conditions evaluate the product option's children and grandchildren.
  - None: Conditions evaluate children only. This is the default option.
- Child Bundle Action Level
  - 1: Actions can select, deselect, enable, disable, show, or hide the children and the grandchildren of the option this configuration rule targets.
  - None: Conditions evaluate children only. This is the default option.

Important: Validation rules run immediately only for options on the same level as the option or attribute that prompted an Apply Immediately event. To apply your product rule to a different level, save the configuration of the product associated with your configuration rule.

Example: You sell a bundle with three total levels. The quantity of all product options throughout the bundle must be less than or equal to five. Your validation rule contains a configuration rule that returns an error if the total product quantity is greater than five. For this example, we refer to the three levels of your bundle as grandparent, parent, and child.

Table 32: Parent Bundle Condition Level = 1 and Child Bundle Condition Level = 1

Grandparent Quantity	Parent Quantity	Child Quantity	Result
2	2	2	Validation Fails
1	2	2	Validation Passes
2	2	1	Validation Passes

In the first case, the validation fails because the configuration rule considers the grandparent, parent, and child quantities, for a grand total of six. The second and third cases validate because the configuration rule considers the grandparent, parent, and child quantities for a grand total of five.

Table 33: Parent Bundle Condition Level = None and Child Bundle Condition Level = 1

Grandparent Quantity	Parent Quantity	Child Quantity	Result
2	2	2	Validation Passes
2	2	4	Validation Fails
4	2	2	Validation Passes

In the first and third case, the validation passes because the configuration rule considers the parent and child quantities, for a grand total of four. The validation fails in the second case because the parent and child quantities add up to six.

Table 34: Parent Bundle Condition Level = 1 and Child Bundle Condition Level = None

Grandparent Quantity	Parent Quantity	Child Quantity	Result
2	2	2	Validation Passes

Grandparent Quantity	Parent Quantity	Child Quantity	Result
4	2	4	Validation Fails
2	2	4	Validation Passes

In the first and third case, the validation passes because the configuration rule considers the parent and child quantities, for a grand total of four. The validation fails in the second case because the parent and child quantities add up to six.

Table 35: Parent Bundle Condition Level = None and Child Bundle Condition Level = None

Grandparent Quantity	Parent Quantity	Child Quantity	Result
2	2	2	Validation Passes
4	2	4	Validation Passes
2	2	4	Validation Passes
2	6	2	Validation Fails

In the first three cases, the validation passes because the configuration rule considers only the parent quantity of 2. The validation fails in the fourth case because the parent quantity is six.

Alert Rules

EDITIONS

Available in: **All** CPQ Editions

Alert rules provide informational messages during configuration or pricing. Unlike a validation rule, alert rules let you continue and save configurations and quotes without changing anything.

Use alert rules to provide suggestions for optimal but nonrequired configuration and pricing processes such as best practices.

Set your product rule's type to Alert so that alert rules are set up the same as validation rules. When an alert rule fires and finds a configuration value or quote value that matches its error condition, users see an error message. They can revise their configuration or quote or continue without correcting the errors.

Example: Your company sells server hardware, including power supply units. Company best practices recommend sales reps sell at least one 208-V fan with your PSUs. However, you don't want to require this sale via a validation rule in case your customers have this fan or an equivalent model. In this case, you can use an alert rule to remind sales reps that 208-V fans are recommended. From there, reps can check to see if their customer has the necessary fan. You need two summary variables: one that outputs the count of PSUs in your quote and one that outputs the count of fans.

Product rule

- Conditions Met: Custom
- Scope: Product
- Evaluation Event: Always
- Type: Alert
- Active: Selected
- Message: We recommend the 208-V fan for this PSU.
- Advanced Condition: 1 AND 2

Error Condition 1

- Tested Variable: PSU Count
- Operator: greater than
- Filter Type: Value
- Filter Value: 0

Error Condition 2

- Tested Variable: Fan Count
- Operator: equals
- Filter Type: Value
- Filter Value: 0

Selection Rules

Set up your product rules to automatically add, remove, hide, enable, or disable options in a bundle.

EDITIONS

Available in: **All** CPQ Editions

Selection rules let you adjust product options in a bundle on your quote. For example, let's say you sell a reporting software bundle. You can sell training license only after your user buys a software license, both of which are product options in your bundle. In this case, you can create a selection rule that initially hides the Reporting Software Training product option from the bundle. The configurator then shows Reporting Software Training only when the sales rep selects the bundle's Reporting Software License option.

Selection rules use configuration rules to specify a bundle to target. The configuration rule's Product field represents the bundle you're targeting.

Selection rules also use actions alongside error conditions. An action represents the step your selection rule performs when the rule meets its error conditions. When your rule meets its conditions, it checks the action for a product to target. This product is the product option you want to change within the bundle you defined in the configuration rule. The rule then performs the step defined in the action's Type field. You can select from the following action types:

Type	Description
Add	Add the specified option.
Remove	Deselect the specified option.
Enable	If an option is disabled, this action enables the checkbox so users can select it.
Disable	Disable an option so users can't select it.
Enable and Add	Enable an option and select it.
Disable and Remove	Deselect an option and disable it so users can't select it.
Show	Show a hidden option.
Hide	Prevent an option from showing.
Show and Add	Show the option and select it.
Remove and Hide	Deselect an option and hide it from view.

You can set your configuration rule's product field to a specific bundle so your product rule can target that bundle across multiple quotes.

Example: Let's jump back to the example at the beginning of this topic. Before making your rule, create a summary variable to count the quantity of Software Reporting License product option. Then, use that variable in your rule's error condition.

Selection Rule components	Field values
Product Rule	• Name: Show Reporting Software Training • Type: Selection • Condition Met: All • Scope: Product
Error Condition	• Tested Variable: Reporting License Count • Operator: Greater or Equals • Filter Type: Value • Filter Value: 1
Product Action	• Type: Show • Product: Reporting Software Training • Required: True
Configuration Rule	• Product: Software Options • Active: True

Example: Your computer design company has a quote with two quote line groups: one for a red monitor package and one for a silver monitor package. You control these package types with a custom Color field on the quote line group. Users who buy either package can add a monitor bundle, which contains a product option for the monitor stand. You want a product rule that adds a support stand for every monitor added to the red package:

Selection Rule components	Field values
Product Rule	• Name: Add Stand to Red Package Monitor Bundles • Type: Selection • Condition Met: All • Scope: Product • Evaluation Event: Always
Error Condition	• Tested Object: Quote Line Group • Tested Field: SBQQ__Color__c • Operator: Equals • Filter Type: Value • Filter Value: Blue

Selection Rule components	Field values
Product Action	• Type: Add • Product: Monitor Stand • Required: True

Selection Rules in Nested Bundles
Use selection rules within nested bundles to expand the scope of options Salesforce CPQ considers when evaluating options in the configurator.

Selection Rules in Nested Bundles

Use selection rules within nested bundles to expand the scope of options Salesforce CPQ considers when evaluating options in the configurator.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later.

Selection rules can evaluate children, grandchildren, or parents of the option they initially target. Control this feature with three configuration rule fields.

- Parent Bundle Condition Level
  - 1: Conditions evaluate the parent of the product option that the configuration rule targets and all children of that parent. Siblings of the parent product aren't evaluated.
  - None: Conditions evaluate children only. This is the default option.
- Child Bundle Condition Level
  - 1: Conditions evaluate the product option's children and grandchildren.
  - None: Conditions evaluate children only. This is the default option.
- Child Bundle Action Level
  - 1: Actions can select, deselect, enable, disable, show, or hide the children and the grandchildren of the option this configuration rule targets.
  - None: Conditions evaluate children only. This is the default option.

Important: Selection rules run immediately only for options on the same level as the option or attribute that prompted an Apply Immediately event. To apply your product rule to a different level, save the configuration of the product associated with your configuration rule.

Example: You sell a software suite with two training level options. Option 1 is basic training, which your bundle selects by default. Option 2 represents admin training. It's a configurable option that lets users select from three admin training levels. Customers who select any admin training level don't require basic training, so the selection rule removes Option 1 from the suite.

You can break down this suite into the following bundle layout.

- Parent Product: software suite
- Children: training types
- Grandchildren: admin training levels

If a user selects any of the admin training levels, Salesforce CPQ should deselect basic training. This setup means that your conditions test against the grandchildren, and the actions apply to the children. Create a selection rule with the following setup. The configuration rule targets the software suite.

- Child Bundle Condition Level: 1
- Parent Bundle Condition Level: None
- Child Bundle Action Level: None

If your software suite required selecting or deselecting license add-ons based on the selected training level, your conditions test against the children and apply the actions to the grandchildren.

- Child Bundle Condition Level: None
- Child Bundle Action Level: 1

The default functionality tests against children, so you don't test any other levels. However, you need another level of consideration from the parent product, because your actions apply to its grandchildren.

Filter Rules and Dynamic Bundles

EDITIONS

Available in: **All** CPQ Editions

Allow your sales reps to choose their own options in a bundle. You can use filter rules to filter the options they can choose from.

A filter rule is a product rule where the Type field is set to Filter. Filter rules use configuration rules to target a bundle feature and actions to determine whether certain options appear when users configure a bundle. For example, let's say your company sells an IT security bundle and you regularly update your product offering with new security products. In this case, it's easier to create a bundle that can contain any security product rather than constantly updating the bundle's options based on your offering.

We call this type of bundle a dynamic bundle. To enable this setup, set a feature's Option Selection Method field to Dynamic.

Actions for filter rules need Filter Field, Operator, and Filter Value fields to determine the product or products you want to filter. If you target a field in your Product Search sidebar, Salesforce CPQ populates that field's value with the value you choose in your action. From here, you can use the action's type to choose whether sales reps can remove that value and thus the filter. A type set to Default Filter means that the filtering persists even if you remove the filtered value from the Product Search sidebar. A type set to Optional Filter means that Salesforce CPQ removes the filter logic when you remove the filtered value from the sidebar.

Important: Your action's filter field evaluates only fields on the product option. If you want to evaluate a product field, make an exact duplicate of that field on the product option and use it for your filter field instead.

You can then set your configuration rule to target the bundle and select the feature you want to filter from.

Because you're not using Error Conditions, you can leave your filter rule's Conditions Met and Advanced Conditions fields blank.

Product Rule Guidelines

EDITIONS

Available in: **All** CPQ Editions

Consider key guidelines when you're making a product rule.

If you have multiple rules that can affect the same product or products, consider ranking them by evaluation order. Salesforce CPQ evaluates higher-ordered rules last, so the product rule with the highest evaluation order number is the final product rule considered.

Use the Evaluation Event field to determine when Salesforce CPQ considers and runs a product rule.

- Load: when the user loads the quote line editor
- Edit: when the user changes a field in the quote line editor

- Save: when the user saves (via the Save or Quick Save buttons) a quote in the quote line editor
- Always: when any user loads, edits, or saves a quote

You can configure selection rules to perform an action on their targeted product options based on the selection of other options and configuration attributes. This process means that users can receive immediate feedback about valid and invalid operations instead of receiving it only when they save their configuration. Processing selection rules in real time is useful for making a guided configuration: You can make configuration attributes in the form of questions. Salesforce CPQ makes a configuration based on user response, possibly by selecting multiple options in one step.

To make a selection rule that functions in real time, select **Apply Immediately** and **System** on the product option that you want to function in real time. We recommend setting your selection rule's Evaluation Event field to Always to ensure that the real-time processing happens throughout anything you do in the quote line editor.

Date fields in your error condition's filter value must use the format YYYY-MM-DD 00:00:00.

Configurator-scoped product rule conditions can't use quote line summary variables.

Discounts

Salesforce CPQ provides several ways to discount prices for your customers. You can set discounts across an entire quote or on individual products and product groups.

EDITIONS

Available in: **All** CPQ Editions

Discount Schedules
: Use discount schedules to create volume discounts based on quantity or terms for your quote lines. Set the quantity or term ranges in tiers of percentages or amounts of currency.

Distributor Discounts Fields
: Distributor discounts let you apply extra discounts to your quotes and quote lines based on your opportunity's distributor. Use specific fields on quotes to manage distributor discounts.

Target Price for Quotes and Groups
: Apply proportional discounts across your quote so the quote total matches a certain amount. This process is useful if your customer has a specific budget they can't exceed.

Compound Discounts
: While most discount schedules define discounts for a quantity range, a compound discount provides a discount that automatically changes for every unit of your product. Compound discounts help you define a product discount that scales based on each unit of quantity for your product.

Discount Categories
: Use the discount category object to store values that you want to apply via rules to one or more products. After you associate the discount category with your products, you can use a product rule or price rule to apply that value to those products.

Discount Schedules

Use discount schedules to create volume discounts based on quantity or terms for your quote lines. Set the quantity or term ranges in tiers of percentages or amounts of currency.

EDITIONS

Available in: Salesforce CPQ **Summer '14** and later

Discount schedules provide tier-driven discounts to the list price of your quote lines. For example, you can sell routers for $25 each, but apply the following discounts based on how many routers a customer buys. In this case, you create a discount schedule with three tiers.

- Tier 1: 10% discount for 1–9 products
- Tier 2: 20% discount for 10–19 products

- Tier 3: 30% discount for 20+ products

Use the Type field to determine how Salesforce CPQ applies the discount.

- Range: Products are discounted at the rate of whatever tier applies to the quoted quantity. Let's say you ordered 30 products under the discount schedule in the first two paragraphs. All 30 units receive a 30% discount.
- Slab: Units within a certain bound receive discounts equal to their tier's discount value. Let's say you ordered 30 products under the discount schedule in the first two paragraphs. Units 1 through 9 receive a 10% discount, units 10 through 19 receive a 20% discount, and units 20 through 30 receive a 30% discount. Slab discount products are not allowed on partial orders.

Discount Unit: Choose your unit for discounting:

- Percent: Enter the discount as a percentage.
- Amount: Enter a static value for the discount. This value is useful when you want to arrive at an exact discounted price without calculating discount percentages that could contain many decimals.

If a product falls under a discount schedule, a calendar icon appears on any of its quote lines in the quote line editor. You can hover over the icon to show the discount schedule's name, discount unit, and all its discount tiers.

Discount Tiers

A discount tier represents a single discount level for your discount schedule. For example, 1 through 10 products receive a 10% discount. You can create a tier in your discount schedule's Discount Tiers related list.

The Lower Bound value is the smallest value needed for the discount. The Upper Bound value is the highest value needed for the discount. However, the Upper Bound value isn't inclusive. Make sure that your upper bound is one digit higher than the value you want to include. For example, if you want your tier to include values 1 through 10, set your Upper Bound value to 11.

If you select the Allow Override field on your discount schedule record, sales reps can edit Discount Tier fields within the quote line editor.

Term Discount Schedules for Subscription Products

Apply a discount schedule based on the length of your subscription product's term. This feature is useful if you want to provide an incentive for longer subscriptions.

Slab Discount Schedules with Block Prices

Slab discount schedules can align with block-priced products to create price schedules. This setup creates a price schedule that moves from flat pricing to per-unit pricing.

Allow Users to Edit Discount Schedules in the Quote Line Editor

You can let your sales reps edit discount schedule tiers, bounds, units, and discount values from within the quote line editor. This feature is useful if you want to give sales reps greater control over creating or managing discount schedules.

Edit Discount Schedules in the Quote Line Editor

When you're negotiating prices with a customer, you can change the range of discounts in your discount schedule. Use the quote line editor to change discount schedule tiers, bounds, units, and discount values.

Apply Discount Schedules to a Cost-Priced Product

By default, a discount schedule targets a product's list price. However, admins can also apply a discount schedule to a product's cost. This feature is useful for companies that price their products based on cost and markups instead of the list price and discounts.

Custom Quantity Discount Schedules

To drive your discount schedule by a value other than the quote line's quantity, use a custom quote line field in your range or slab discount schedules.

[Combine Block Pricing with Discount Schedules](#)

Apply a discount schedule and a block price to the same product record. When sales reps add that product to a quote, Salesforce CPQ applies discount schedule pricing to units that fall outside the product's block pricing tiers.

[Discount Schedule Fields](#)

Discount schedule fields allow you to customize the scope and discount value of your discount schedule. With certain page layout and field-level security settings, some fields aren't visible or editable.

Term Discount Schedules for Subscription Products

EDITIONS

Available in: **All** CPQ Editions

Apply a discount schedule based on the length of your subscription product's term. This feature is useful if you want to provide an incentive for longer subscriptions.

Use this feature to control discount schedule pricing based on a subscription product's Term instead of its Quantity. If you assign a discount schedule to a subscription product's Term Discount Schedule field, Salesforce CPQ considers the schedule's discount tiers by term length instead of quantity.

If you're using a term discount schedule, we recommend naming your tiers by term periods for ease of reference.

Example: You have the following discount schedule:

Tier Name	Lower Bound	Upper Bound	Discount (%)
0–3 Months	0	4	5%
4–6 Months	4	7	10%
7–9 Months	7	10	15%
10–12 Months	10	13	20%

If you applied this schedule to a product with a 12-month term, it receives a 20% discount.

Slab Discount Schedules with Block Prices

EDITIONS

Available in: Salesforce CPQ Winter '18 and later

Slab discount schedules can align with block-priced products to create price schedules. This setup creates a price schedule that moves from flat pricing to per-unit pricing.

The lower bound of the first slab discount tier must equal the upper bound of the last block tier.

Remember that a tier's upper bound must be one digit above the value you want to include. For example, a tier that covers 10 products has an upper bound of 11.

Example: You have a product with the following pricing and discount values.

- Price Book Entry Unit Price: $10
- Block Tier 1: 1–11 = $100
- Block Tier 2: 11–21 = $180
- Slab Tier 1: 21–31 = 10% discount
- Slab Tier 2: 31–41 = 20% discount
- Slab Tier 3: 41+ = 25% discount

When you order this product, Salesforce CPQ creates this tiered price schedule.

- Price Tier 1: 1–11 = $100 flat fee
- Price Tier 2: 11–21 = $80 flat fee. This price represents the difference from Block Tier 1.
- Price Tier 3: 21–31 = $9 per unit. This price represents the $10 unit price with Slab Tier 1's 10% discount.
- Price Tier 4: 31–41 = $8 per unit. This price represents the $10 unit price with Slab Tier 2's 20% discount.
- Price Tier 5: 41+ = $7.50 per unit. This price represents the $10 unit price with Slab Tier 3's 25% discount.

When you order 60 units of the product under this price schedule, Salesforce CPQ prices the order products as follows.

- Units 1 10: $100
- Units 11–20: $80
- Units 21 30: $90 (10 units at $9.00 each)
- Units 31–40: $80 (10 units at $8.00 each)
- Units 41–60: $150 (20 units at $7.50 each)

Allow Users to Edit Discount Schedules in the Quote Line Editor

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

You can let your sales reps edit discount schedule tiers, bounds, units, and discount values from within the quote line editor. This feature is useful if you want to give sales reps greater control over creating or managing discount schedules.

To create and edit custom discount schedules, sales reps require create, read, edit, and delete permissions on the discount schedule and discount tier objects.

1. Go to a discount schedule record.
2. Set the Override Behavior field to one of the following values.
   - **All**: Sales reps can edit all this discount schedule's tiers.
   - **Current Tier Only**: Sales reps can edit only the pricing tier that the quote line currently falls within.

Edit Discount Schedules in the Quote Line Editor

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

When you're negotiating prices with a customer, you can change the range of discounts in your discount schedule. Use the quote line editor to change discount schedule tiers, bounds, units, and discount values.

To edit discount schedules in the quote line editor, your Salesforce admin must define a value for the discount schedule's Override Behavior field.

If you can't create or change discount schedules, ask your Salesforce admin to enable your permissions for the discount schedule and discount tier objects.

1. Click the discount schedule icon on your quote line.
   Salesforce CPQ displays the Discount Schedule Editor page.
2. If your admin set the discount schedule's override behavior to **Current Tier Only**, you can edit only the following fields on the tier that currently covers your quote line.
   - Name
   - Lower Bound
   - Upper Bound
   - Discount (%)

3. If your admin set the discount schedule's override behavior to **All**, you can edit fields on every tier and also perform the following actions.
   a. Click **+** to add a tier below the current discount tier.
   b. Click **Add** to add a tier after the discount schedule's last tier.
   c. Select the delete tier icon to remove a discount tier.
   d. Select several tiers and then click **Delete** to delete all those tiers
   e. If you want to delete all your schedule's tiers, select the checkbox next to the # header and then click **Delete**. Salesforce CPQ requires at least one tier for a discount schedule to take effect, so you cannot delete the first tier.

Apply Discount Schedules to a Cost-Priced Product

By default, a discount schedule targets a product's list price. However, admins can also apply a discount schedule to a product's cost. This feature is useful for companies that price their products based on cost and markups instead of the list price and discounts.

When you provide a discount schedule lookup to your product's Cost Schedule field, Salesforce CPQ applies tier discounts to the quote line's cost instead of the list price. If you have markup prices, Salesforce CPQ applies those next.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

If your product has cost and list pricing, you can apply cost schedules and discount schedules at the same time. In this case, the pricing is evaluated in the following order.

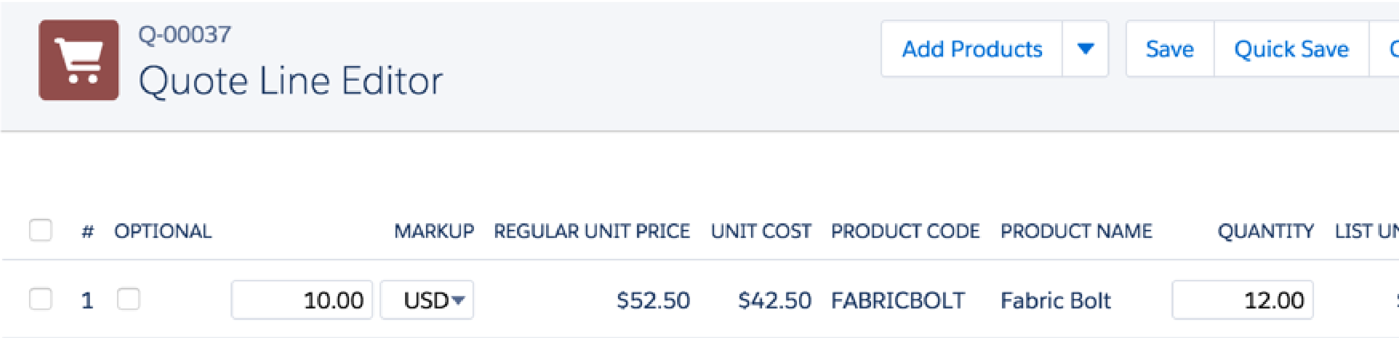
1. The cost schedule's discount is applied to your quote line's cost. The value is presented in the quote line's special price.
2. The discount schedule's discount is applied to the quote line's special price.
3. The markup is applied to your quote line's special price. This value is then sent to your quote line's regular price. Salesforce CPQ applies your markup to the quote line's special price, then sends that value to your quote line's regular price.

1. Add the Cost Schedule field to your product page layout.
2. Go to one of your cost-priced products.
3. Give your product's Cost Schedule field a lookup to one of your discount schedules.

Example: Your company sells fabric bolts at a cost of $50 per bolt. You've applied the following discount schedule to your Fabric Bolt product's Cost Schedule field.

Tier Name	Lower Bound	Upper Bound	Discount (%)
1–10	1	11	10
11–20	11	21	15
21–30	21	31	20

If your sales rep quotes 12 fabric bolts and applies a $10 markup, you end up with a net total of $630.`$50 * .85 = $42.50 + $10 = $52.50 * 12 = $630.00`



Custom Quantity Discount Schedules

EDITIONS

Available in: Salesforce CPQ Summer '15 and later

To drive your discount schedule by a value other than the quote line's quantity, use a custom quote line field in your range or slab discount schedules.

A discount schedule uses the Quote Line Quantity field to determine which discount tier covers the quote line. By default, the Quote Line Quantity field is based on the quantity in the quote line. You can change it to another field on the quote line. For example, a company sells fabric in single bolts and provides discounts for large orders. Quote lines for all fabric products in the price book inherit a custom field called Fabric Length. The company creates a discount schedule where the quote line quantity has a value of Fabric Length. This means that means that the discount schedule's tiers correspond to the quote line's fabric length.

- Tier 1: 1 to 10 feet for a 0% discount
- Tier 2: 10 to 20 feet for a 10% discount
- Tier 3: More than 20 feet for a 20% discount

Custom quantity discount schedules function differently depending on the type of discount schedule you're using.

- For slab discount schedules, the custom quantity value determines the tier of the schedule to apply and the quantity purchased on the quote line.
- For range discount schedules, the custom quantity value determines which tier to apply. However, the standard quote line quantity field still represents the quantity being purchased.

For example, let's say you had a $10 fabric bolt product and a discount schedule with the following tiers.

- Tier 1: 1 to 10 feet for a 0% discount
- Tier 2: 10 to 20 feet for a 10% discount
- Tier 3: More than 20 feet for a 20% discount

Your quote contains a fabric bolt quote line with a quantity of 200 and a fabric length of 10. Let's review how prices differ between slab and range discount schedules using fabric length for their quote line quantity.

Slab

The 10 products fall in discount tier 2 at 10%.

Price = (quantity within Tier 1) * list price * (1 - 0% discount) + (quantity within tier 2) * list price * (1 - 10%)

Price = (9 * 10 * 100% + 1 * 10 * 90%) = $99

Range

The 10 products fall in discount tier 2 at 10%.

Price = (Total Quantity) * List Price * (1-10%)

Price = 10 * 10 * 90% = $90

Note: The following actions and setups aren't supported.

- Custom fields for discount schedules that include cross orders.
- Targeting an amendment quote line with the same custom-quantity slab discount schedule that targeted the original quote line on the original quote

Create a Discount Schedule Based on Custom Fields

Create a discount schedule that evaluates a custom quote line field to determine its discount tier.

Create a Discount Schedule Based on Custom Fields

Create a discount schedule that evaluates a custom quote line field to determine its discount tier.

EDITIONS

Available in: Salesforce CPQ Summer '15 and later

A discount schedule uses the Quote Line Quantity field to determine which discount tier covers the quote line. By default, the Quote Line Quantity field is based on the quantity in the quote line, but you can change it to another field on the quote line. Custom fields aren't supported for discount schedules that include cross orders.

For example, a company sells fabric in single bolts and provides discounts for large orders. Quote lines for all fabric products in the price book inherit a custom field called Fabric Length. The company creates a discount schedule in which tiers correspond to the quote line's fabric length.

1. Add the Quote Line Quantity field to the Discount Schedule page layout.
2. Add your custom field to the Quote Line page layout.

   The custom field must be a formula field, number field, or a field that you can edit on the quote line record.
3. Add your custom field to the Quote Line Quantity picklist.
4. If you want to edit the custom field in the quote line editor, add the field to the quote line's Line Editor field set.

Note:

- Custom fields aren't supported for discount schedules that include cross orders.
- Targeting an amendment quote line with the same custom-quantity slab discount schedule that targeted the original quote line on the original quote is not supported.

Combine Block Pricing with Discount Schedules

Apply a discount schedule and a block price to the same product record. When sales reps add that product to a quote, Salesforce CPQ applies discount schedule pricing to units that fall outside the product's block pricing tiers.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

- You can use range discounts, slab discounts, and cross-order discount schedules.
- If you apply block pricing and a discount schedule to a product, and the product's quantity goes outside the upper bound of both, Salesforce CPQ sets the quote line's net total price to 0.

- The upper bound of a tier must be one unit above the range you want to include. For example, if you want your tier to include quantities of up to 30, set its upper bound to 31.

1. In your product record, set up your block price tiers.

   To use discount schedules and block prices on the same product, your last block price tier requires an upper bound.

2. Create a discount schedule and associate it with the same product record.

   The lower bound of the first discount tier must be one unit above the upper bound of the highest block price tier.

Example: Your company sells wireless routers with a list price of $100 and the following block prices.

Table 36: Block Prices

Price Name	Lower Bound	Upper Bound	Price
1	1	21	$2,000
2	21	41	$3,500
3	41	61	$4,750

Customers usually don't order quantities of over 60, but you want to provide a percentage-based range discount schedule to accommodate customers who do.

Table 37: Discount Schedule

Tier Name	Lower Bound	Upper Bound	Discount (%)
1	61	66	15
2	66	null	20

Let's see how Salesforce CPQ prices a few quote lines for your routers based on their quantity.

Table 38: Quote Line Prices

Quote Line Quantity	Calculation	Price
25	Because this quantity falls within your block price's second tier, your quote line has a price of $3,500.	$3,500
62	• The quantity of 60 creates an initial price of $4,750. • You have 2 units outside the block price. Salesforce CPQ applies a 15% discount to $200, which comes out to $170. • $4,750 + $170 = $4,920.	$4,920
70	• The quantity of 70 creates an initial price of $4,750.	$5,500

Quote Line Quantity	Calculation	Price
	• You have 10 units outside the block price. Salesforce CPQ applies a 20% discount to $1,000, which comes out to $800. • $4,750 + 800 = $5,500.	

Discount Schedule Fields

Discount schedule fields allow you to customize the scope and discount value of your discount schedule. With certain page layout and field-level security settings, some fields aren't visible or editable.

EDITIONS

Available in: All Salesforce CPQ Editions

Discount Schedule Fields

Allow Override

Sales reps can copy the discount schedule and adjust its tiers in the quote line editor.

Aggregation Scope

Define how to combine quantities of quote lines for products using this discount schedule.

- Quote: Combine line items in the quote.
- Group: Combine line items in the group
- None: The schedule evaluates each line item independently, even for the same product. This is the default setting.
- Note: Discount schedules using cross orders or cross products require an aggregation scope with a value of Quote or Group.
- Note: When an MDQ product falls under an aggregation scope, Salesforce CPQ uses the sum of the quantity in all segments to determine the quote line's discount tier.

Cross Orders

This discount schedule includes previously purchased quantities of a line item for a given customer. For example, if a customer already bought 5 laptops, and the current quote for this customer contains 10 laptops, Salesforce CPQ uses a quantity value of 15 when evaluating the current quote line against volume discount tiers. Salesforce CPQ evaluates this field only on primary quotes. Subscriptions or assets from expired contracts are not evaluated for cross-order quantity calculation.

Cross Products

This discount schedule combines the quantities of all products on the quote when evaluating line quantity against volume discount tiers.

Constraint Field

If you're using cross-order discount schedules, limit the records Salesforce CPQ considers to records with matching fields. The field must exist on both the quote line being evaluated and the subscriptions and assets the discount schedule evaluates against. The constraint field can't be a formula field. This feature doesn't work with amendments, as amendments don't look up to other orders.

Description

Enter a brief description so sales reps know the purpose of this discount schedule.

Discount Unit
Choose whether this discount schedule applies discounts as a percentage or as a static amount.

Excluded Pricebook IDs
This discount schedule does not apply discounts to products in the selected pricebook.

Include Bundled Quantities
When the discount schedule evaluates a bundle product, include the quantities of the bundle's product options in the aggregation scope.

Price Book
Apply this discount schedule to only a product from this price book. Define the product in the discount schedule's Product field.

Product
Apply this discount schedule to only this product, from the price book defined in the discount schedule's Price Book field.

Override Behavior
Defines whether sales reps can edit this discount schedule's discount tiers in the quote line editor.

Schedule Name
We recommend giving your discount schedule a name that makes it easy to tell apart from your other discount schedules.

Type
Choose how this discount schedule applies its discounts to a quote line's price.

- Range: Products are discounted at the rate of whatever tier applies to the quoted quantity. Let's say you ordered 30 products under the discount schedule in the first two paragraphs. All 30 units receive a 30% discount.
- Slab: Units within a certain bound receive discounts equal to their tier's discount value. Let's say you ordered 30 products under the discount schedule in the first two paragraphs. Units 1 through 9 receive a 10% discount, units 10 through 19 receive a 20% discount, and units 20 through 30 receive a 30% discount. Slab discount products are not allowed on partial orders.

Discount Tier Fields

Discount
Enter the percentage or amount to apply to products with quote line ranges that fall within this tier.

Lower Bound
Enter the smallest quantity to include within this tier.

Name
We recommend giving your discount tier a descriptive name.

Upper Bound
Enter the largest quantity to include within this tier. This value is not inclusive, so make sure your upper bound is one digit higher than what you actually want to include. For example, if you want your tier to include units of 5 through 10, set the upper bound to 11.

Distributor Discounts Fields

Distributor discounts let you apply extra discounts to your quotes and quote lines based on your opportunity's distributor. Use specific fields on quotes to manage distributor discounts.

EDITIONS

Available in: All Salesforce CPQ Editions

Distributor
If this quote's opportunity references a partner record with a role of distributor, this field inherits the partner record.

Distributor Discount

Admins can manually define a percentage for this field. Or, they can create a workflow rule that automatically provides a value based on the quote's Distributor field. By default, all quote lines inherit the value of the quote's distributor discount. However, you can change the quote line's distributor discount to override the value passed from the quote's distributor discount.

Salesforce CPQ applies distributor discounts to the quote's partner price when the quote line price is calculated. The result of this calculation is applied to the quote line's net unit price.

If you don't see the Distributor and Distributor Discount fields on the Quote page layout, or the Distributor Discount field on the Quote Line page layout, check with your admin.

Note: If you want to allow sales reps to edit distributor discounts in the quote line editor, add Distributor Discount to the quote or quote line's Line Editor field set.

Target Price for Quotes and Groups

EDITIONS

Available in: **All** CPQ Editions

Apply proportional discounts across your quote so the quote total matches a certain amount. This process is useful if your customer has a specific budget they can't exceed.

To set this feature up, ensure that the Target Customer Amount field is in your quote object's line editor field set. Also ensure that the Target Customer Amount field is in your quote line group object's line editor field set.

Enter the value you need in the quote line editor field Target Customer Amount. Salesforce CPQ adjusts the net unit price of all discountable line items accordingly so that the quote total matches the value you entered.

The discount doesn't apply to nondiscountable lines or lines with a value of zero.

You can also apply target amounts at the group level. Navigate to your group and enter a value in its Target Customer Amount field, located in the group header.

Note:

- Target customer amount is a unit-based discount. Quote line items with large quantities might not get an exact discount value. Salesforce CPQ looks for a line with a quantity of one, and then allocates the difference. Your amount may be off by one or two units of your org's smallest currency unit if no lines have a quantity of one. To avoid this discrepancy, add a discount product to your quote.
- Salesforce CPQ applies the discount for target customer amount in real time only when the Pricing and Calculation package setting Calculate Immediately is set to True. Otherwise, you need to click **Calculate** or **Save** in the quote line editor to apply the discount.
- Target customer amount behavior changes when you use the ApplyAdditionalDiscountLast special field with other discounting methods. For example, let's say you're using target customer amount and a partner discount while ApplyAdditionalDiscountLast is active. In this case, Salesforce CPQ applies the partner discount before applying the discount needed to reach the target customer amount.

Note:

Compound Discounts

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

While most discount schedules define discounts for a quantity range, a compound discount provides a discount that automatically changes for every unit of your product. Compound discounts help you define a product discount that scales based on each unit of quantity for your product.

You define a compound discount as a percentage value on your product's Compound Discount (%) field. Then, Salesforce CPQ calculates the value of a compound-discounted quote line using the following formula.

```
Discount Percent = 1 / (quantity ^ (compound discount value / 100))
```

Example: Your company sells a wireless router priced at $100 per unit, with a compound discount of 25%. Let's look at a few prices for this router based on quote line quantity. Assume that this quote has a decimal precision value of 2.

Quantity	Price per Unit	Total Price
1	$100	$100
2	$84.09	$168.18
5	$66.87	$334.35
10	$56.23	$562.34
25	$44.72	$118.03

Discount Categories

Use the discount category object to store values that you want to apply via rules to one or more products. After you associate the discount category with your products, you can use a product rule or price rule to apply that value to those products.

A discount category acts as a storage object that can hold custom fields. Reference one of those fields in a product rule or price rule and use it on any product that has a lookup to your discount category.

EDITIONS

Available in: **All** CPQ Editions

You can create any kind of custom field on a discount category. We've shipped the discount category object with a Max Discount % field. This number field doesn't perform any action on its own. However, you can use it with a product rule or price rule to enforce a value on all related product fields.

Example: Let's say you want to make sure the Additional Discount field on several of your products doesn't rise above 30%. Create a discount category object where Max Discount % is set to 30. Then associate that discount category with all the products where you want the additional discount constrained.

Discount Category

- Name: Enforce 30 Percent Max Discount
- Max Discount %: 30

Next, create a price rule with a formula that retrieves the Max Discount % value from the Max Discount % field on your discount category. The price rule checks the Additional Discount field of all products that look up to your discount category. The price rule then injects the Max Discount % value to any of those products where the Additional Discount value is higher than the Max Discount % value. Here's one way to make this type of price rule.

Price Rule

- Price Rule Name: Discount Category
- Evaluation Scope: Calculator
- Calculator Evaluation Event: On Calculate
- Conditions Met: All

- Active: Selected
- Evaluation Order: 1
- Lookup Object: SBQQ__DiscountCategory__c

Price Rule Lookup Query

- Tested Object: Quote Line
- Tested Field: SBQQ__Discount__c
- Operator: Greater Than
- LookupField: SBQQ__MaxDiscountRate__c

Price Action

- Target Object: Quote Line
- Target Field: Discount (%)
- Rule Lookup Object: SBQQ__DiscountCategory__c
- Source Lookup Field: SBQQ__MaxDiscountRate__c

Find products where you want the 30% maximum discount enforced. Then make sure that their Discount Category field looks up to Enforce 30 Percent Max Discount.

Price Rules

Price rules automate price calculations and update quote line fields. This feature is useful if your business contains products that change in response to the presence of other products on your quote.

EDITIONS

Available in: **All** Salesforce CPQ Editions

Price rules inject a static value, field value, or summary variable into a quote or quote line field. For example, create a price rule so that the quantity of maintenance kits in your quote is always twice the quantity of that quote's printers. When a customer changes the printer quantity and saves the quote, Salesforce CPQ activates the price rule and updates the maintenance kit quantity.

Price rules can target the configurator or the quote line editor's calculator. If you target the calculator, you can set the Calculator Evaluation Event field to apply the price rule:

- Before calculation
- After calculation
- During calculation
- Or during any combination of the above three

Calculation occurs when the user saves within the quote line editor or clicks **Calculate**.

If you target the configurator, you can set the Configurator Evaluation Event field to apply the price rule:

- When the user saves
- When the user edits the bundle and also when they save

The price rule record contains Price Rules, Price Conditions, and Price Actions.

[Price Rule Fields](#)

To create or modify a price rule, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

[Price Conditions](#)

A price condition compares a field value, summary variable, or formula against another field value, summary variable, or formula. A rule can contain as many conditions as you like. You specify which conditions must be true for your rule to apply its action. For example, a rule can fire its action in response to meeting all its conditions, one condition, or a certain logically determined combination of its conditions.

[Price Actions](#)

When your price rule meets its conditions, the rule applies its price actions to a target field. A price action sources the value from a summary variable, formula, user-defined value, or other quote line field and sends that value to your target field. A price rule must have at least one action. You can have several actions that target the same field, or several actions that each target a different field.

[Configurator Evaluation Events](#)

A price rule's configurator evaluation event determines when Salesforce CPQ applies the price rule to its target. You can change the evaluation event based on when you want sales reps to see the price rule's results.

[Price Rule Considerations](#)

Review some important considerations when you create a price rule.

Price Rule Fields

To create or modify a price rule, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

EDITIONS

Available in: All Salesforce CPQ Editions

Price Rule Fields

Active

Activate this price condition. If this field is not selected, Salesforce CPQ does not consider this condition when evaluating a price.

Advanced Condition

If the Conditions Met field has a value of **Custom**, define the logic used in evaluating the rule's conditions.

Calculator Evaluation Event

If the price condition evaluation scope targets the calculator, choose the action that causes Salesforce CPQ to evaluate the price rule.

- On initialization—When a sales rep opens the quote line editor
- Before calculate—Before Salesforce CPQ calculates the quote's price
- On calculate—While Salesforce CPQ calculates the quote's price
- After calculate—After Salesforce CPQ calculates the quote's price

Conditions Met

Define the logic for whether the price rule applies its action to your quote based on the value of the rule's conditions.

- All—Apply the action if all the rule's conditions are met
- Any—Apply the action if any rule condition is met
- Custom—Use this field with the Advanced Conditions field to define when to apply the action. For example, you can enable a rule with three conditions to apply based on the logical statement `1 AND (2 OR 3)`.

Configurator Evaluation Event

If the price condition evaluation scope targets the configurator, choose the action that causes Salesforce CPQ to evaluate the price rule.

- Save—The sales rep clicks **Save** in the configurator. This action is the default.
- Edit—Immediately after a sales rep or rule changes a quantity field in the configurator, and when the sales rep clicks **Save**.

Evaluation Scope

Choose whether Salesforce CPQ evaluates a price rule during bundle configuration or within the quote line editor.

Evaluation Order

Define the order of evaluation for the price rules in your org. Salesforce CPQ applies a price rule starting with the lowest evaluation order, so the price rule with the highest order number is evaluated last. A higher-order number takes precedence if a lower-ordered rule targets the same object.

Lookup Object

Price rules can also use lookup queries to evaluate quote fields against fields from an object outside the quote line editor, which is called a lookup object. If you're using lookup queries on your price rule, define your lookup object here.

Price Conditions

A price condition compares a field value, summary variable, or formula against another field value, summary variable, or formula. A rule can contain as many conditions as you like. You specify which conditions must be true for your rule to apply its action. For example, a rule can fire its action in response to meeting all its conditions, one condition, or a certain logically determined combination of its conditions.

EDITIONS

Available in: All Salesforce CPQ Editions

Price Condition Fields

To create or modify a price condition, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

Create a Price Condition

Add a price condition to your price rule.

Price Condition Fields

To create or modify a price condition, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

EDITIONS

Available in: All Salesforce CPQ Editions

Price Condition Fields

Field

Choose the target field that the price condition evaluates. You can select only one type of target (field, tested variable, or tested formula) per price condition.

Filter Formula

If you set Filter Type to **Formula**, define the formula here.

Filter Type

Choose the type of record that the price condition evaluates its target record against.

Filter Value

If you set Filter Type to **Value**, define the value here.

Filter Variable

If you set Filter Type to **Variable**, define the summary variable here.

Index

If your price rule uses advanced conditions, choose a number to use in the rule's Advanced Conditions field. For example, you could assign this field a value of 1, and then use it in the advanced condition 1 OR (2 AND 3).

Operator

Choose the logical operator that Salesforce CPQ uses to evaluate the target record against your filtered record.

Tested Variable

Choose the summary variable that the price condition evaluates. You can select only one type of target (field, tested variable, or tested formula) per price condition.

Tested formula

Define a formula for the price condition to evaluate. You can select only one type of target (field, tested variable, or tested formula) per price condition.

Create a Price Condition

EDITIONS

Available in: All Salesforce CPQ Editions

Add a price condition to your price rule.

1. From your price rule record, go to the Price Conditions related list, and click **New Price Condition**.
2. Choose the type of record you want to test.

   You can choose either a field on an object, a summary variable, or a formula.

   a. If you're evaluating a field, choose the object that contains the field first, and then choose the field.

      You might need to manually add values to this picklist in the price condition's page layout.

3. Choose the operator to use in the logical statement that evaluates the tested record against the filter.
4. In the Filter Type field, define the type of record you're evaluating the tested record against.
5. Choose a filter record to define the record that you're evaluating the tested record against.

   a. If the Filter Type field is set to **Value**, provide a text string as a value.

   b. If the Filter Type field is set to **Variable**, define a lookup to a summary variable in the Filter Variable field.

   c. If the Filter Type field is set to **Formula**, enter a formula in the Filter Formula field.

      You can construct a formula using Salesforce's operators and functions. You can also add information from the quote or the target object field (for example, SBQQ__QuoteLine__c.SBQQ__ListPrice__c).

6. If you're referencing this price condition in a price rule's Advanced Condition field, enter a number value for the price condition's Index field. Advanced conditions allow you to create conditional logic under which a price rule fires, for example, IF (1 AND 2) OR 3.
7. Save your price condition.

Example: Your company sells industrial printing hardware. You want a price rule that applies a 10% discount on a quote for an industrial printer if the customer account has purchased one in the past. You can use a summary variable and 2 price conditions in your price rule. The summary variable adds the total number of industrial printer assets across the entire account. The first price condition ensures that the quote contains a quote line with an industrial printer. The second price condition ensures that the account has at least one industrial printer asset. Your price rule has a Conditions Met field value of All, so it applies the discount when both these conditions evaluate to true.

Summary Variable

- Variable Name: Industrial Printer Count
- Target Object: Asset
- Aggregate Function: Count
- Aggregate Field: Quantity
- Filter Field: Asset_Product_Code__c

- Operator: equals
- Filter Value: IND_PRINT

Price Condition 1

- Object: Quote Line
- Field: SBQQ__ProductCode__c
- Operator: equals
- Filter Type: Value
- Filter Value: IND_PRINT

Price Condition 2

- Tested Variable: Industrial Printer Count
- Operator: greater than
- Filter Type: Value
- Filter Value: 0

Price Actions

When your price rule meets its conditions, the rule applies its price actions to a target field. A price action sources the value from a summary variable, formula, user-defined value, or other quote line field and sends that value to your target field. A price rule must have at least one action. You can have several actions that target the same field, or several actions that each target a different field.

Price actions usually apply discounts to a pricing field on a quote line.

EDITIONS

Available in: All Salesforce CPQ Editions

Price Action Fields

To create or modify a price action, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

Create Price Actions

Create a price action that performs an action on a target field when the price rule meets certain criteria.

Price Action Fields

To create or modify a price action, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings.

EDITIONS

Available in: All Salesforce CPQ Editions

Price Action Fields

Formula

If the action applies a formula to your target field, define the formula here. You can use fields that are available on your target object.

Order

If your price rule has multiple actions, Salesforce CPQ applies actions with lower numbers first.

Rule

The rule that contains the price action. Salesforce CPQ provides a value for this field by default.

Source Field
Enter the field containing the value that you want to insert into your target field. This field cannot be the same as your target field. You can select only 1 type of source per price action.

Source Lookup Field
If your price rule uses lookup queries, choose the API name of the field that you want to return from the lookup object record that matches your condition. You can select only 1 type of source per price action.

Source Variable
Choose the summary variable that you want to insert as the value of your target field. You can select only one type of source per price action.

Target Field
Choose the field that receives an updated value as the result of this price action.

Target Object
Choose the object containing the field that you want to update as the result of this price action.

Create Price Actions

Create a price action that performs an action on a target field when the price rule meets certain criteria.

EDITIONS

Available in: All Salesforce CPQ Editions

1. From your price rule, go to the Price Actions related list, and click **New Price Action**.
2. Select a value for the Target Object field. This object contains the field that your action targets.
3. Enter a value in the Target Field field. This is the field that you want Salesforce CPQ to update when the price rule meets its price conditions. You might need to manually add values to this picklist in the price action's page layout.
4. Choose the value that you want to insert into your target field when your price rule meets its conditions. You have several options.
   a. To insert a static value into your target field, enter the value in the Value field.
      This field usually has a numeric value because you typically target a line's quantity or price.
   b. To insert the result of a formula into your target field, enter the formula in the Formula field.
      You can construct a formula using Salesforce operators and functions. You can also add information from the quote or the target object field (for example, SBQQ__QuoteLine__c.SBQQ__ListPrice__c).
   c. To insert a value from another quote line field on your quote, enter the field's API name in the Source Field field.
   d. To insert a value from a summary variable, enter the lookup to that variable in the Source Variable field.
   e. To insert a value from a lookup query, select the field for the Source Lookup Field.
5. If your price rule contains multiple actions, set their Order fields to control when Salesforce CPQ evaluates each action. Actions with lower numbers are evaluated first.

Example: You want your quotes to contain one wireless router for every 12 laptops your customers order. Your routers have a Product Code of WIFIAP, and your laptops have a Product Code of LTPRO. In this case, you want a calculator-scoped price rule that applies the rule on calculation, one condition, and two actions. Make sure that you have a summary variable that counts the total quantity of laptops on your quote and divides the quantity by 12. You reference this variable in the first action.

Price Condition

- Object: Quote Line
- Field: SBQQ__ProductCode__c

- Operator: Equals
- Filter Type: Value
- Filter Value: WIFIAP

Price Action

- Target Object: Quote Line
- Target Field: SBQQ__Quantity__c
- Source Variable: Total Laptop Quantity / 12
- Order: 1

Price Action

- Target Object: Quote Line
- Target Field: SBQQ__Quantity__c
- Formula: CEILING(SBQQ__Quantity__c)
- Order: 2

When a user performs a calculation in the quote line editor, Salesforce CPQ considers all quote lines where the Product Code equals WIFIAP. It then processes the first action and updates the quantity of those lines so they equal the result of your summary variable. Finally, Salesforce CPQ considers the second action and uses the ceiling formula to round the router's quantity up to the nearest whole number.

Configurator Evaluation Events

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

A price rule's configurator evaluation event determines when Salesforce CPQ applies the price rule to its target. You can change the evaluation event based on when you want sales reps to see the price rule's results.

The price rule's configurator evaluation event has three values.

- None: Salesforce CPQ applies the price rule after the user clicks **Save** and then leaves the configurator.
- Save: Salesforce CPQ applies the price rule after the user clicks **Save** in the configurator.
- Edit: Salesforce CPQ applies the price rule immediately after the user navigates out of a changed field that the price rule is covering.

Example: Let's look at a basic configurator-scoped price rule and see how its evaluation event affects when we see the results of a configuration change.

Your company sells an enterprise server management bundle for $6,000 each. However, you want to reduce its price to $5,000 when one of its product options, an admin training license, reaches a quantity of 2.

1. Create a price rule called "Set Price on Quantity 2."
   - Evaluation Scope: Configurator
   - Conditions Met: All
   - Configurator Evaluation Event: None
   - Active: Selected
   - Product: Enterprise Server Management Bundle
   - Condition #: 0
2. On your price rule, create the following price condition.

- Object: Product Option
- Field: SBQQ__Quantity__c
- Operator: Equals
- Filter Type: Value
- Filter: 2

3. On your price rule, create the following price action.
   - Target Field: Unit Price
   - Value: 5000
   - Action #: 0
4. Configure your server management bundle and change the admin training license's quantity to 2. Notice that the bundle's price hasn't changed.
5. Click **Save** and view your bundle in the quote line editor. The price has dropped to $5,000.
6. Configure your server management bundle, set the admin training license's quantity to a different number, and then save.
7. Return to your price rule and change its configurator evaluation event to Save.
8. Configure your server management bundle, change the admin training license's quantity to 2, and then click **Save**. Notice that the bundle's price didn't change in the configurator until you clicked **Save**.
9. Configure your server management bundle, set the admin training license's quantity to a different number, and then save.
10. Return to your Set Price on Quantity 2 price rule and change its configurator evaluation event to Edit.
11. Configure your server management bundle and change the admin training license's quantity to 2. Notice that the bundle's price changes when you leave the quantity textbox.

Price Rule Considerations

Review some important considerations when you create a price rule.

EDITIONS

Available in: **All** CPQ Editions

- On Initialization rules run before Salesforce CPQ calculates formula fields. If your On Initialization rule contains a formula field that requires a specific value, you might run into an error. Price conditions and actions load related records and evaluate formula fields following After Calculate rules and plugin methods. Any Block Price, Discount Tier, or Term Discount relationship in a formula contains an incorrect record. You can still reference Block Price, Discount Tier, and Term Discount in a formula field, but don't reference those relationships in the formula itself.
- Salesforce CPQ doesn't support On Initialization, Before Calculate, or On Calculate formulas that reference the Prorate Multiplier field or any unit price other than the List Price field. The values of those fields aren't accurate until after the rule event's completion.
- Salesforce CPQ doesn't support On Initialization, Before Calculate, or On Calculate formulas that reference total price fields other than component totals and package totals. Noncomponent and nonpackage totals get their values following calculation, so a price rule can't reference them during the first calculation sequence.
- Price actions can target ListPrice__c or Quantity__c only if those actions can't send a null value. Salesforce CPQ aborts calculation for a line if its List Price or Quantity fields are null.
- If you're using a source value instead of a formula, make sure that you write your dates as YYYY-MM-DD. No other date format is supported.
- When two price rules share an evaluation event, the earliest-firing price action's target field value isn't usable in the other rule's price condition. Salesforce CPQ evaluates all an evaluation event's conditions simultaneously. Actions then fire sequentially for rules whose

conditions have been met. An action from one rule in an evaluation event can't influence the conditions of another rule in the same evaluation event.

- Salesforce CPQ doesn't insert records upon calculation, so it can't have a Required By field that looks up to a quote line. If your price rule contains SBQQ__RequiredBy__c, it doesn't fire until after a line gets saved to the database on the advanced calculator. Because of this process, price rule formulas with SBQQ__RequiredBy__c don't always function correctly.
- If your price rule targets list price, use Original Price as the source field rather than List Price. This process helps prevent infinite calculation loops.
- Structure your price rules to evaluate as early in the calculation sequence as possible. This structure ensures that your rule sends values to as many fields as it can during one sequence. This way, you won't have to revise your rules if you need to add requirements.
- Price rules targeting the Additional Discount (%) or Additional Discount (Amt) fields need to have an action that sends a null value to the other Additional Discount field.

Refresh Quote Prices

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

Refresh your quote line prices from the quote or parent opportunity's details. This action is useful if you changed your quote's price book or a Salesforce admin updated pricing in your quote's price book. This way, you don't have to open the quote line editor to recalculate prices.

1. To refresh prices on one quote, go to the quote and click **Refresh Prices**, or follow these steps to refresh prices on multiple quotes.
   a. In the opportunity with the quotes you want to refresh, find the Quotes related list.
   b. Select the quotes you want to refresh.
   c. Click **Refresh Prices**.

Salesforce CPQ evaluates price book entries for your quoted products and updates the values in each quote line's original price and list unit price. It then recalculates the remaining prices based on active product rules, price rules, discounts, and markups.

The CPQ Quote Calculation Sequence

EDITIONS

Available in: Salesforce CPQ Spring '16 and later.

Salesforce CPQ's Advanced Quote Calculator determines quote and quote line prices in response to user or automated actions. Review which types of actions cause your quote to recalculate. You can also customize workflow rules and price rules to target objects during various stages of the quote calculation sequence.

When the Advanced Quote Calculator performs a calculation, it updates quote and quote line fields based on changes that users made after the last calculation. For example, if you gave a quote line a 10% additional discount and clicked **Calculate**, Salesforce CPQ calculates the new pricing for that quote line. It then updates your quote's total to reflect the quote line's price change.

By default, the Advanced Quote Calculator performs a calculation when a user or process does any of the following actions.

- Selects **Calculate** in the line editor
- Adds products in the line editor
- Deletes lines in the line editor
- Selects **Save** or **Quick Save** in the line editor
- Edits the quote header and changes one of the fields that trigger recalculation
- Edits a quote line using the **Edit** button
- Changes the value of a field in the Calculating Fields field set

Important: The Advanced Quote Calculator doesn't support inserting a quote line or updating the calculating fields directly from a queueable job. These actions start a queued calculation from the quote line trigger, which results in an error.

Define Which Fields Cause a Quote Calculation

When certain field values in the quote line editor are changed, either manually or by an automated process, the Salesforce CPQ Advanced Quote Calculator recalculates the quote. You can define which field changes cause a quote to be recalculated.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

1. From the object management settings for Quotes, go to Field Sets.
2. Edit the Calculating Fields field set.
3. Drag and drop your desired fields from the field list into the field set. If needed, you can also remove fields.
4. Save your changes.

Important: Salesforce CPQ prevents users from chaining multiple calculations within 1 transaction. This allows Salesforce CPQ to stay within Salesforce platform governance limits. Salesforce CPQ sets a flag the first time that CPQ triggers run for calculations that prevent the trigger from firing again. As a result, workflow rule and process builder updates to a calculating field don't cause a second calculation.

CPQ Quote Calculation Stages

When an action causes a calculation, the Salesforce CPQ Advanced Quote Calculator runs through a series of steps to determine pricing for quote lines and quote.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later.

When you perform an action that starts a calculation, the Salesforce CPQ advanced quote calculator performs these actions.

Important: If a user or process changes a product during calculation, data from the new product is not available until a new calculation begins.

Loading and Initialization

1. Loads products and options
2. Loads lookup relationships

3. Retrieves formula field metadata
4. Executes price rules where the value in the **Event** field is On Initialization
5. Initializes plugins, if you have any
6. If the plugin was initialized, execute the plugin's onInit() method
7. Updates related records in case the plugin or price rules sent new IDs

First Round of Calculations

1. Calculates formula fields on the quote lines
2. Calculates formula fields on the quote
3. Calculates formula fields on the quote line group
4. Executes price rules where the value in the **Event** field is Before Calculate
5. If you're using a plugin, execute the plugin's beforeCalculate() method
6. Updates related records in case the plugin or price rules sent new IDs

Second Round of Calculations

1. Calculates line quantities
2. If you're using a plugin, execute the plugin's beforePriceRules() method
3. Executes price rules where the value in the **Event** field is On Calculate
4. If you're using a plugin, execute the plugin's afterPriceRules() method
5. Updates related records in case the plugin or price rules sent new IDs
6. Ensures that any discount schedules injected by price rules have loaded properly
7. Indexes line item quantities according to schedule and group keys
8. If the quote contains a target amount, reset the quote's discounts
9. Resets quote and group totals

Third Round of Calculations

1. Calculates fixed items
2. Calculates dynamic items
3. Calculates totals
4. If the quote contains a target amount, apply discounts proportionally across the quote so that the quote reaches the target
5. Combines identical bundle components into one quote line
6. Executes price rules where the value in the **Event** field is After Calculate
7. If you're using a plugin, execute the plugin's afterPriceRules() method
8. Updates related records in case the plugin or price rules sent new IDs

Final Evaluations and Updates

1. Evaluates quote line formula fields again

2. Evaluates quote line group formula fields again
3. Evaluates quote formula fields
4. Calculates totals for groups and the quote again, since line-level totals may have changed
5. Summarizes MDQ segments and related fields
6. Deletes plugin modules, if any
7. Updates related records in case the plugin or price rules sent new IDs

To detect upserts of Quote Lines that will later be rolled back, you can examine SBQQ__Incomplete__c field, which is set to TRUE during the rolled-back transaction.

Important: Salesforce CPQ prevents users from chaining multiple calculations within one transaction. This allows Salesforce CPQ to stay within Salesforce platform governance limits. Salesforce CPQ sets a flag the first time that CPQ triggers run for calculations that prevent the trigger from firing again. As a result, workflow rule and process builder updates to a calculating field don't cause a second calculation.

Disable Real-Time Calculation for CPQ Quotes

EDITIONS

Available in: All Salesforce CPQ Editions

By default, Salesforce CPQ calculates quote prices in real-time based on user actions and changes to fields in the quote's Calculating Fields field set. If you want Salesforce CPQ to calculate prices only when a sales rep clicks **Quick Save** or **Save** in the quote line editor, you can disable real-time calculation.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Find your Salesforce CPQ package, and then click **Configure**.
3. On the Pricing and Calculations tab, deselect the **Calculate Immediately** field.

Enable Asynchronous Calculation for Quotes

EDITIONS

Available in: Salesforce CPQ Summer '18 and later.

By default, calculations performed outside the quote line editor time out if they take more than 30 seconds. Timeouts can be prevented by enabling asynchronous calculation, however, there are some drawbacks to doing so.

When asynchronous calculations are enabled, all calculations outside the quote line editor are slower. Calculations made in the quote line editor aren't affected.

To enable asynchronous calculations in your org, contact customer support.

Lookup Queries

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

Create lookup queries on your product rules and price rules to evaluate field values on objects other than quotes. You can then use your rule's actions and conditions to send those values to a quote, quote line, or product option.

Product rules and price rules contain the Lookup Object field, which defines the object containing fields that you want to evaluate. Rules also contain a related list for making lookup queries. Lookup queries reference the fields on the object that you can compare against your quote, quote line, or product option fields.

For example, your insurance company has a custom Premium Rate object with fields for age, crash history, and car type. When a sales rep makes an insurance quote for a prospective customer, they enter their customer's age, crash history, and car type into matching custom quote fields. You set up lookup queries on either type of rule based on your needs.

- A product rule lookup query tests Premium Rate to see if your customer was in more than five accidents in their lifetime. If they were, the product rule adds a subscription product called High-Risk Insurance Premium to your quote.
- A price rule lookup query tests Premium Rate to see if your customer has never been in an accident. If so, the price rule applies a 5% discount to your insurance package.

The object that your lookup query evaluates can be a custom object, such as Premium Rate, or Salesforce CPQ's Lookup Data object. If you don't want to make a new object in your Salesforce org, use the lookup data object. All you have to do is create custom lookup data fields to store information such as age, crash history, and car type.

The lookup query object contains the following important fields.

Tested Object
Define the object that contains the field your lookup query evaluates.

Tested Field
Define the quote field that your lookup query evaluates.

Match Type
Choose where this lookup query evaluates its target data. If you choose Static Value, Salesforce CPQ compares the value of the query's Tested Value field against all the values in your dataset. It then selects the first dataset value that matches your tested value. If you choose Field Value, the query takes the value referenced in your quoting process and matches that value against the data in the table.

Tested Value
Define this value if your query uses a static match type.

Lookup Field
Define the lookup data field or custom object field that you want to test.

Operator
Define how Salesforce CPQ compares your lookup field to the field you're testing.

Using Lookup Queries with Product Rules
Use lookup queries with your product rules to query data from an object other than a quote. Use that data to change products and configurations in the quote line editor and configurator.

Using Price Rule Lookup Queries Against Custom Objects
Define a custom object to store data in Salesforce CPQ and then reference this data through lookup queries on your price rules.

Lookup Queries for Large Datasets
When you query a large dataset, you have several options for how you set up your rules and lookup queries.

Using Lookup Queries with Product Rules

Use lookup queries with your product rules to query data from an object other than a quote. Use that data to change products and configurations in the quote line editor and configurator.

Your product rule's lookup query maps data from your lookup object back to your product rule. This process lets your product rule use lookup data fields and values in place of the rule's actions and conditions. Your product rule contains several lookup fields for accepting data from the lookup object.

EDITIONS

Available in: Salesforce CPQ Spring '17 and later

Lookup Object

The API name of the object that stores your lookup data. Use SBQQ__LookupData__c or a custom object.

Lookup Product Field

The API name of the lookup object field that serves as a product action's product lookup. The lookup object field you use must be a picklist or text field.

Lookup Type Field

The API name of the lookup object field that serves as a product action's type picklist. The lookup object field you use must be a picklist or text field.

Lookup Required Field

The API name of the lookup object field that serves as a product action's required checkbox. The lookup object field you use must be a checkbox field.

Lookup Message Field

The API name of the lookup object field that serves as your product rule's message. The lookup object field you use must be a picklist or text field.

The lookup data object has several fields that map by default to your product rule's lookup fields. To use a custom field for your lookup object, define those relationships manually. The following table shows the lookup object field values that each type of product rule requires.

Product Rule Field	Selection Rules Require These Values From Your Lookup Object	Validation Rules Require These Fields From Your Lookup Object	Alert Rules Require These Fields From Your Lookup Object
Lookup Type Field	SBQQ__Type__c or a custom field	None	None
Lookup Product Field	SBQQ__Product__c or a custom field	None	None
Lookup Required Field	SBQQ__Required__c or a custom field	None	None
Lookup Message Field		SBQQ__Message__c or a custom value	SBQQ__Message__c or a custom value

Important: When a product rule uses a lookup query, it ignores the value of the Feature field on the product rule's configuration rule. This ensures that the product rule filters using only the lookup query's parameters.

Example: You sell an IT Service bundle that contains a Bronze Support product option, a Silver Support product option, and a Gold Support product option. The bundle also has a configuration attribute called Support Level so your sales reps can change the type of support they want while configuring the bundle.

Configure a selection rule and lookup query that hides and shows your support options in the configurator based on whether you select Bronze, Silver, or Gold in the Support Level configuration attribute menu. First, create the following lookup data records. All your records should have a Required field with a value of Yes.

Name	Category	Type	Product
Lookup Data 1	null	Show	Gold Support

Name	Category	Type	Product
Lookup Data 2	null	Show	Silver Support
Lookup Data 3	null	Show	Bronze Support
Lookup Data 4	Bronze	Show & Add	Bronze Support
Lookup Data 5	Bronze	Hide & Remove	Silver Support
Lookup Data 6	Bronze	Hide & Remove	Gold Support
Lookup Data 7	Gold	Show & Add	Gold Support
Lookup Data 8	Gold	Hide & Remove	Bronze Support
Lookup Data 9	Gold	Hide & Remove	Silver Support
Lookup Data 10	Silver	Show & Add	Silver Support
Lookup Data 11	Silver	Hide & Remove	Bronze Support
Lookup Data 12	Silver	Hide &Remove	Gold Support

When you associate these objects with your product rule, each record acts like a combination of error conditions and actions when you're in the configurator. Category is your filter, Type is your action, and Product refers to each option of your support bundle. Next, create a standard selection rule.

Name
: Configuration Selection Lookup Rule

Conditions Met
: Any

Scope
: Product

Evaluation Event
: Always

Type
: Selection

Make sure that you add a configuration rule that looks up to your support bundle. Instead of error conditions and actions, create lookup queries on the product rule. Because you're using a selection rule, fill out the Lookup Type, Lookup Product, and Lookup Required fields.

Lookup Object
: SBQQ__LookupData__c

Lookup Type Field
: SBQQ__Type__c

Lookup Product Field
: SBQQ__Product__c

Lookup Required Field
: SBQQ__Required__c

Add a lookup query to your selection rule.

Match Type
Configuration Attribute Value

Operator
Equals

Lookup Field
SBQQ__Category__c

Create a quote with your support bundle and enter the configurator. When you change the support level configuration attribute, your product rule references the relevant lookup object record. It then changes your options accordingly. For example, if you choose **Bronze**, the product rule adds your Bronze Support option while removing the Silver Support and Gold Support options.

Using Price Rule Lookup Queries Against Custom Objects

Define a custom object to store data in Salesforce CPQ and then reference this data through lookup queries on your price rules.

Use a custom object with your lookup queries to show your lookup data with more detail than you could show through the Lookup Data object.

EDITIONS

Available in: Winter '16 and later

Example: Marketing wants to ensure that a promotional discount applies to all products of a particular type during a season. Your sales reps also want to offer a promotional code to help sell a new line of products between 04/01/2018 and 05/31/2018. Your sales reps want to apply a promotional discount when they quote a product between 04/1/2018 and 05/31/2018. They also want to enter a promotional code in the quote line editor to apply a discount independent of the promotional discount. You can store your promotional data in a custom object and use a set of lookup queries to reference it. Then use the price rule to apply that data to your quote line's list price. Here are the steps you complete.

1. Create a custom Promotion object with fields that store your promotional data: Start Date, End Date, Promo Code, and Discount (%). Start Date has a value of 4/1/2018, End Date has a value of 5/31/2018, Promo code has a value of Promo1, and Discount has a value of 10%.
2. Add a Promo Code text field to your quote. When your price rule is active, your sales reps can enter `Promo1` on the quote to receive a 10% discount.
3. Create a price rule with the following fields.
   - Evaluation Scope: Calculator
   - Conditions Met: All
   - Lookup Object: Promotion
4. Create a price condition so that the price rule fires when your quote's promo code field doesn't have a blank value.
5. Create your lookup queries. Test whether the quote's promo code matches the promotion's promo code, and whether the quote expires before the promotion begins. Remember that the tested field refers to the quote field you're evaluating, and lookup field refers to the Promotion object field that you're testing against. Each lookup query should have the quote as the tested object. After that, set up each query as follows.

Tested Field	Operator	Lookup Field
PromoCode__c	equals	PromoCode__c
SBQQ__ExpirationDate__c	greater than	Start_Date__c
SBQQ__ExpirationDate__c	less than	End_Date__c

6. Create your price actions. Your price rule performs these actions when all its lookup queries are true. The first action sets your source lookup field to find the value of your quote line's discount field and sends that value to your promotional discount field. The second action pulls the promotional discount into a formula to determine your quote line's final list price.

   This is your first price action.

   Target Object
   Quote Line

   Target Field
   Promotional Discount__c

   Source Lookup Field
   Discount__c

   This is your second price action.

   Target Object
   Quote Line

   Target Field
   SBQQ__ListPrice__c

   Formula
   SBQQ__OriginalPrice__c * (1 – Promotional_Discount__c)

Lookup Queries for Large Datasets

EDITIONS

Price rule lookup queries are available in Salesforce CPQ Winter '16 and later

Product rule lookup queries are available in Salesforce CPQ Summer '17 and later

When you query a large dataset, you have several options for how you set up your rules and lookup queries.

For example, let's say you have a dataset containing 75,000 pricing records that you imported from an external system. You want a price rule setup that can query those 75,000 records to find a matching value and update a value in your quote line editor.

You can use one price rule that sends multiple lookup queries to a large table. Or you can break your dataset into several smaller tables and use several price rules that each send one query to one of the smaller tables. The ideal workflow depends on whether your lookup query has a narrow scope. Multiple rules, each with one specific lookup query, allow you to access specific data more quickly than one rule with multiple lookup queries. However, if your lookup queries contain any of the following setups, you can minimize the number of records you need the dataset to return.

- An error condition that uses the equals operator
- A tested field on the Quote object
- A static tested value, like a text or number field

If you're using any of these three setups, you can use one set of lookup object records and one rule, which makes administration easier. Here's one way you could use a price rule to query a dataset of 75,000 records on a single lookup object.

Condition
Picklist value isn't blank.

Lookup Query
Match two quote line text values to two dataset record values to find one match out of 75,000 records.

Actions
Update a percentage field and a number field on the quote line with the value you matched.

CPQ Quote Fields

Salesforce CPQ provides various custom managed fields for CPQ quotes.

EDITIONS

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Account	SBQQ__Account__c	Lookup(Account)	The customer account for this quote. Defaults to the account for the opportunity when creating a quote.
Additional Discount (%)	SBQQ__CustomerDiscount__c	Percent(3, 2)	Additional percentage-based discount extended to the customer on this quote. This value can be overridden at the individual line item level. Any line items that don't have an additional discount explicitly specified default to this value.
Additional Discount (Amount)	SBQQ__AdditionalDiscountAmount__c	Formula (Currency)	Additional amount-based discount extended to the customer on this quote. This value can be overridden at the individual line item level. Any line items that don't have an additional discount explicitly specified default to this value.

Field	API Name	Data Type	Definition
Average Customer Discount (%)	SBQQ__AverageCustomerDiscount__c	Formula (Percent)	Average customer discount (in percent) for this quote.
Average Partner Discount (%)	SBQQ__AveragePartnerDiscount__c	Formula (Percent)	Average partner discount (in percent) for this quote.
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Defines the billing frequency: • One-Time • Monthly • Quarterly • Semiannual • Annual • Usage
Bill to City	SBQQ__BillingCity__c	Text(40)	City of the Bill To address for this quote.
Bill to Country	SBQQ__BillingCountry__c	Text(80)	Country of the Bill To address for this quote.
Bill to Name	SBQQ__BillingName__c	Text(255)	Name for the Bill To address.
Bill to Postal Code	SBQQ__BillingPostalCode__c	Text(20)	Postal Code of the Bill To address for this quote.
Bill to State	SBQQ__BillingState__c	Text(80)	State portion of the billing address for this quote.
Bill to Street	SBQQ__BillingStreet__c	Text Area(255)	Street portion of the billing address for this quote.
Contracting Method	SBQQ__ContractingMethod__c	Picklist	"By Subscription End Date" creates a separate Contract for each unique Subscription End Date, containing only those Subscriptions. "Single Contract" creates one Contract containing all Subscriptions, regardless of their End Dates: • By Subscription End Date • Single Contract
Customer Amount	SBQQ__CustomerAmount__c	Roll-Up Summary (SUM Quote Line)	This is a Roll-Up Summary field.
Days Quote Open	SBQQ__DaysQuoteOpen__c	Formula (Number)	Number of days the quote has been opened.

Field	API Name	Data Type	Definition
Default Template	SBQQ__DefaultTemplate__c	Lookup(Quote Template)	Template that should be used with this quote. SteelBrick CPQ automatically selects the template specified here when you click "Generate Document"
Delivery Method	SBQQ__DeliveryMethod__c	Picklist	Method used to deliver products on this quote: • Download • Ship
Distributor	SBQQ__Distributor__c	Lookup(Account)	Distributor for this quote. Defaulted from partner on opportunity with role of "Distributor"
Distributor Discount	SBQQ__DistributorDiscount__c	Percent(3, 2)	Distributor discount that applies to this quote unless overridden on line item level.
Document Status	SBQQ__DocumentStatus__c	Picklist	Indicates the status of your Document: • Pending • Sent • Failed
Email Template ID	SBQQ__EmailTemplateId__c	Text(18)	ID of email template that is pre-populated when documents generated from this quote are emailed.
End Date	SBQQ__EndDate__c	Date	End date for subscriptions in this group.
Expires On	SBQQ__ExpirationDate__c	Date	Date after which the Quote is no longer valid
First Segment Term End Date	SBQQ__FirstSegmentTermEndDate__c	Date	Used with multi-segment Products to prorate first segment. Enter the end date to prorate first segment.
Generate Contracted Price	SBQQ__GenerateContractedPrice__c	Picklist	Generate a contracted price based on all adjusted quote line on quote if set to "Yes." • Yes • No

Field	API Name	Data Type	Definition
Group Line Items	SBQQ__LineItemsGrouped__c	Checkbox	Select this option to use SolutionGroups(TM) or add your own groups on the Edit Lines page to categorize and subtotal quote line items.
Introduction	SBQQ__Introduction__c	Long Text Area(2000)	Introduction that can be printed on the generated PDF document.
Key	SBQQ__Key__c	Text(80) (External ID) (Unique Case Insensitive)	Internal unique key used for identifying "shopping cart" quotes without relying on internal IDs.
Line Item Count	SBQQ__LineItemCount__c	Roll-Up Summary (COUNT Quote Line)	Number of line items in this quote.
List Amount	SBQQ__ListAmount__c	Roll-Up Summary (SUM Quote Line)	Total List Amount of each non-optional line item in this quote.
Markup (%)	SBQQ__MarkupRate__c	Percent(6, 2)	Default markup rate applied to line items on this quote. You are able to override this value on group and line item level.
Master Contract	SBQQ__MasterContract__c	Lookup(Contract)	Master contract with which subscription products in this quote are to be co-terminated.
Master Evergreen Contract	SBQQ__MasterEvergreenContract__c	Lookup(Contract)	Master evergreen contract that determines which evergreen contracts are tied to this quote.
Master Evergreen Service Contract	SBQQ__MasterEvergreenServiceContract__c	Lookup(Contract)	Master evergreen service contract that determines which evergreen service contracts are tied to this quote.
Net Amount	SBQQ__NetAmount__c	Roll-Up Summary (SUM Quote Line)	Total Net Amount of each non-optional line item in this quote.
Notes	SBQQ__Notes__c	Long Text Area(2000)	Notes printed on the generated PDF document.
Opportunity	SBQQ__Opportunity2__c	Lookup(Opportunity)	Opportunity associated with this Quote.

Field	API Name	Data Type	Definition
Original Quote	SBQQ__OriginalQuote__c	Lookup(Quote)	If this Quote record represents a change order, use this field to link back to the original quote.
Partner	SBQQ__Partner__c	Lookup(Account)	Primary partner on this deal (if any). This field defaults to the partner marked as primary in the Partners related list on the opportunity.
Partner Discount	SBQQ__PartnerDiscount__c	Percent(3, 2)	Discount extended to the partner on this opportunity.
Payment Terms	SBQQ__PaymentTerms__c	Picklist	Terms that govern payment of the items in this quote: • Due on Receipt • Net 15 • Net 30 • Net 45 • Net 60 • Net 75 • Net 90
Price Book	SBQQ__PriceBook__c	Lookup(Price Book)	Price Book associated with this Quote.
Pricebook ID	SBQQ__PricebookId__c	Text(18)	ID of the Price Book used by this quote.
Primary	SBQQ__Primary__c	Checkbox	Select this checkbox to designate this quote as the primary one on the opportunity and sync quote line items with opportunity line items.
Primary Contact	SBQQ__PrimaryContact__c	Lookup(Contract)	Primary contact for the quote. This person's name will appear on generated quote document.
Print Line Items	SBQQ__LineItemsPrinted__c	Checkbox	Select the checkbox to print individual line items on the generated PDF quote document for group quotes.
Quote Process ID	SBQQ__QuoteProcessId__c	Text(18)	ID of the quote process to use with this quote. This field is meant to be populated by a workflow rule.

Field	API Name	Data Type	Definition
Quote Template ID	SBQQ__QuoteTemplateId__c	Text(18)	Stores a quote template ID if one is specified to use when generating quote PDF documents.
Regular Amount	SBQQ__RegularAmount__c	Roll-Up Summary (SUM Quote Line)	Total amount of non-optional line items before additional discounts are applied.
Sales Rep	SBQQ__SalesRep__c	Lookup(User)	Sales rep responsible for this quote if different from the user who owns the quote record.
Ship To City	SBQQ__ShippingCity__c	Text(40)	City on the Ship To address for this quote.
Ship To Country	SBQQ__ShippingCountry__c	Text(80)	Country on the Ship To address for this quote.
Ship To Name	SBQQ__ShippingName__c	Text(255)	Name on the Ship To address for this quote.
Ship To Postal Code	SBQQ__ShippingPostalCode__c	Text(20)	Postal Code on the Ship To address for this quote.
Ship To State	SBQQ__ShippingState__c	Text(80)	State/Province on the Ship To address for this quote.
Ship To Street	SBQQ__ShippingStreet__c	Text Area(255)	Street on the Ship To address for this quote.
Source	SBQQ__Source__c	Lookup(Quote)	If this quote was cloned, this fieldreferences the original quote.
Start Date	SBQQ__StartDate__c	Date	Start date for subscriptions in this quote.
Status	SBQQ__Status__c	Picklist	Status indicating where quote is in its lifecycle: • Draft • In Review • Approved • Denied • Presented • Accepted • Rejected

Field	API Name	Data Type	Definition
Subscription Term	SBQQ__SubscriptionTerm__c	Number(5, 0)	The subscription term used to prorate eligible products by day or month.
Target Customer Amount	SBQQ__TargetCustomerAmount__c	Currency(12, 2)	Enter desired customer amount to automatically calculate additional discount on discountable line items.
title	Title__c	Formula (Text)	Sales reps or administrators can provide a title for the quote.
Total Customer Discount Amount	SBQQ__TotalCustomerDiscountAmount__c	Formula (Currency)	Total amount of customer discount. This includes any contracted, volume, compound rate, and additional discounts.
Type	SBQQ__Type__c	Picklist	Indicates the type of quote: • Quote • Renewal • Amendment • Change Order
Watermark Shown	SBQQ__WatermarkShown__c	Checkbox	Select the checkbox to display watermark in the Quote Document.

Send Your CPQ Quotes

After you finalize your quote, create a document for it, and then send the document to your customers. Salesforce CPQ lets you customize the document creation and management process.

EDITIONS

Available in: **All** CPQ Editions

Building Your CPQ Documents with CPQ Templates

Create preset layouts for your quote documents. You can divide your layouts into sections.

CPQ Quote Document Management

After you create your template objects, you can define additional template layout settings, provide translations, and then generate your quote document.

DocuSign for Salesforce CPQ

The DocuSign for Salesforce CPQ plug-in enables safe and convenient signature management for your CPQ quotes. Your customers can quickly approve quotes and reduce time spent in the CPQ workflow.

CPQ Quote Template Fields

Quote templates define the layout of the documents that your sales reps generate from a quote. With certain page layout and field-level security settings, some fields aren't visible or editable.

Building Your CPQ Documents with CPQ Templates

Create preset layouts for your quote documents. You can divide your layouts into sections.

EDITIONS

Available in: All Salesforce CPQ Editions

Quote templates control the formatting and organization of your quote document. Each template contains sections where you customize the presentation of individual content records such as line items, signature fields, and terms and conditions. Your templates can contain any number of sections in any order, and you can reuse sections between multiple templates. Template content refers to the actual information stored in a section. For example, you can have a Content Header section containing content records for Prepared For, Prepared By, Quote #, Date, Contract Start, and Contract End.

When you're ready to generate your quote document, click **Generate Quote** to go to the Generate Document page. Here you choose your template, paper size, and document name.

Example: Create several templates to cover different types of business documents within your company.

Quote template: Contract

- Template section: Contract Header
- Template section: Terms and Conditions Heading
- Template section: Terms and Conditions
- Template section: Signature Block

Quote template: Statement of Work

- Template section: Cover Page
- Template section: Cover Letter
- Template section: Project Services
- Template section: Assumptions
- Template section: Terms and Conditions
- Template section: Signature Block

Quote template: Quote

- Template section: Ungrouped Line Items
- Template section: Grouped Line Items
- Template section: MDQ Line Items
- Template section: Terms and Conditions
- Template section: Signature Block

CPQ Template Content

Create template content to store specific data or text to insert into your quote sections.

Create Template Sections

Use sections to position and style template content for your quote document.

Template Line Columns

Organize your quote template with columns that represent quote line fields.

Line Item Print Options

Quote templates contain many options for customizing the layout of line items in your documents.

Add Company Logos to Quote Templates

Set your quote template to show a company logo. Company logos help your quote documents look professional and organized.

[CPQ Document Fonts](#)

Salesforce CPQ supports various fonts on quote documents.

CPQ Template Content

Create template content to store specific data or text to insert into your quote sections.

After you create a template content record, you can populate it in the template section's Template Content lookup field.

When you create template content, you can choose from several varieties of content layouts.

EDITIONS

Available in: **All** CPQ Editions

HTML

Select this option for any combination of dynamic fields, such as merge fields or formatted text (bold, bullets, and so on). This process uses an enhanced WYSIWYG editing toolbar to automatically insert the correct HTML tags in your content.

Line Items

Select this option to create a placeholder for the quote line item table. You don't have to reformat this table in your template content. The columns in the Line Columns related list of your quote template determine which attributes to show in this table. You need at least two columns in order for your quote to render.

Quote Terms: Custom

Select this option to use a Visualforce component in the Custom Source field that you want to show in this section of your quote template. Enter the full URL for the Visualforce page that generates this content, using the following format (page name must end with the "c__" prefix): https://c.<instance>.force.com/apex/c__OptivTemplateSectionComponent. The Visualforce component must be compatible with XML (specifically XSL-FO) to work with Salesforce QTC document output.

Quote Terms: Template Bottom

Select this option to use our standard bottom content for the quote template, including notes, dates, and final signature information.

Quote Terms: Template Top

Select this option to use our standard top content for the quote template, including logo, street address, and ship to or bill to details.

The template content editor provides editing functions for your content. From here, you can insert static content or use markup fields and merge fields that reference variable information.

Template Content Markup Fields

Use markup fields in your template content to reference variable CPQ information, such as all fields related to a certain contact on your quote.

Merge Fields

Your template content can store fields that display field values from different objects. These merge fields automatically update in your content when the referenced field updates on the other object. This process is useful if you want template content to reflect changes made elsewhere in your org.

CPQ Quote Terms

Create terms for your quote template. You can customize terms to appear in all quotes or only quotes that meet certain criteria.

Show Images in Your Template Content

Add custom rich text fields to your template content so that your sales reps can upload images directly to the Quote object. You can then show samples of your product on your quote document.

Template Content Markup Fields

EDITIONS

Available in: **All** CPQ Editions

Use markup fields in your template content to reference variable CPQ information, such as all fields related to a certain contact on your quote.

The fields below convert into the corresponding object listed under Description.

Field Starts With	Description
!companyLogo	This is a standard field that references the logo on the quote template.
!template.	This references all fields related to the Salesforce CPQ quote template object.
!quote.	This references all fields related to the Salesforce CPQ object.
!primaryContact.	This references all fields related to the Primary Contact on the Salesforce CPQ quote object.
!salesRep.	This references all fields related to the Sales Rep on the Salesforce CPQ quote object.
!document.	This is a standard field that represents the version only.

Merge Fields

EDITIONS

Available in: All CPQ Editions

Your template content can store fields that display field values from different objects. These merge fields automatically update in your content when the referenced field updates on the other object. This process is useful if you want template content to reflect changes made elsewhere in your org.

For example, let's say you have a template content record that displays vendor information. This content could include a merge field that references the sales rep field on your quote. You can use this content in templates for different quotes, and the content's sales rep information in the document will always match the sales rep on any of the quotes you choose. This would also keep a single quote's documents up to date if the sales rep changes during the quoting process.

Before you begin, create the fields you want to reference and populate them with the quote data you want dynamically replaced with the merge fields in your quote template. Take special note of the type of field you plan to reference as a merge field. Lookup fields require a few additional steps as they reference another record with a 15-character Salesforce ID.

Follow these steps to reference your merge field in your template content.

1. Navigate to the Template Content that you want to contain your Merge Field and click **Edit**.
2. Within the Markup section, Insert a Merge Field using the following format {!quote.SBQQ__FieldName__c} and replace "quote" with the object where the field was created.
   - "SBQQ__" is the namespace prefix for the Salesforce CPQ managed package components, so you'll only need to include it when referencing Salesforce CPQ fields.
   - Do not include "SBQQ__" in any merge fields referencing custom quote fields you created after installing Salesforce CPQ.
   - Replace "NameField__c" with the API Name of your custom field.

Example:

Merge Field	Description
{!quote.SBQQ__BillingName__c}	References the Billing Name field on the quote object.
{!template.SBQQ__ShipToTitle__c}	References the Ship To Title field on the quote template object.
{!primaryContact.Name}	References the Primary Contact lookup (to the Contact object) field on the quote object. The field does not reference the "SBQQ__" prefix because contacts are standard Salesforce objects. Although this is a lookup field, you don't need a formula field to reference the contact's name because Primary Contact is a standard Salesforce field.
{!salesRep.Name}	References the Sales Rep field on the quote object. salesRep.Name is a standard Salesforce field, so it does not need the "SBQQ__" prefix.
{!quote.Type_of_Transaction__c}	References the Type of Transaction field on the quote object.

CPQ Quote Terms

Create terms for your quote template. You can customize terms to appear in all quotes or only quotes that meet certain criteria.

EDITIONS

Available in: **All** CPQ Editions

A basic quote term contains your term's text in the Body field, which appears for all quote templates that use this term. You can also define conditions in the Term Conditions related list. Salesforce CPQ checks these conditions to determine whether that quote term appears on a quote document.

To show your term on a quote document, you need a quote template containing a template content record where Type is set to Quote Terms. When you generate a quote document, Salesforce CPQ includes all quote terms without conditions and all terms where a condition matches the quote's conditions—for example where Opportunity = "Joe's Computers." Salesforce CPQ then shows the quote terms in your quote document based on the position and styling of that document's Quote Term's content record and its parent template section. Terms are ordered in the template based on their Print Order values.

Because you can associate multiple term records with one template content record, you can break your terms into several records. For example, you can have one term record for service terminology and another for proprietary rights. This process lets you edit or replace individual parts of the overall term as needed rather than changing the entire term in one session.

Note: Use Shift+Enter to create a new paragraph in your Body text. Use Enter as a carriage return. Salesforce CPQ does not create whitespace for repeated carriage returns when it renders the quote term on an output document.

Example: Your proposal quote contains the following terms. Each line represents a unique quote term record associated with your template's Quote Terms content record.

1. Master Subscription Agreement
2. Definitions
3. Services
4. Use of the Services
5. Fees and Payments for Services

6. Proprietary Rights
7. Confidentiality
8. Warranties and Disclaimers

Guidelines for Changing Quote Terms
Change the content of a quote term on a specific quote.

Display Quote Terms Conditionally
Use quote term conditions when you want to include or exclude a quote term and its subterms based on certain criteria. You can base these conditions on a summary variable or any quote field. Use this feature if your sales reps can sell products that require extra terms, such as a large power generator that requires extra liability information.

Guidelines for Changing Quote Terms

EDITIONS

Available in: **All** CPQ Editions

Change the content of a quote term on a specific quote.

You can modify a quote's terms by selecting **Modify Terms** from a quote record, which takes you to the Modify Quote Terms page. Choose a template to see all the terms associated with that template. Select the text box for a term to edit it.

Editing a term creates a new quote term record where:

- Type is set to Modified
- Standard Term looks up to the original term that you changed
- Quote looks up to the quote where you modified a term

The original term populates its Modified Terms related list with a lookup to this modified term record. The term's body contains the text as you changed it from your quote record.

When you generate the quote where you modified a term, Salesforce QTC follows the template layout as normal, with one exception: It replaces the term you edited with the term created after you selected Modify Terms.

If you're an admin and you don't want sales reps to change a quote's term, select **Locked** on the relevant quote term record.

Display Quote Terms Conditionally

EDITIONS

Available in: All Salesforce CPQ Editions

Use quote term conditions when you want to include or exclude a quote term and its subterms based on certain criteria. You can base these conditions on a summary variable or any quote field. Use this feature if your sales reps can sell products that require extra terms, such as a large power generator that requires extra liability information.

1. Go to the quote term where you want to add a display condition.
2. In the Use Conditions related list, click **New Term Conditions**.
3. Use the term condition fields to create a logical condition.

   Salesforce CPQ evaluates this condition whenever it generates a quote document that references this quote term. If the condition evaluates to true, Salesforce CPQ includes this quote term on your quote document. You can use the following term condition fields.

   a. Tested Field: Choose a quote field to evaluate in your condition.
   b. Tested variable: Provide a summary variable here if you want to compare your tested field against a variable.
   c. Operator: Choose a logical operator used when Salesforce CPQ evaluates this condition.
   d. Value: Provide a value here if you want to compare your tested field against an absolute value.

Example: Your company sells industrial power generators. Your legal department requires you to display a term containing extra liability information if your customer purchases more than five 500-kW generators.

Use a term condition record to manage this optional term. First, create a summary variable that counts the total quantity of 500-kW generators on your quote. Give your summary variable a name of *`Total Quantity of 500-kW Generators`*. Then you can create a term condition as follows.

- Tested Variable: Total Quantity of 500-kW Generators
- Operator: Greater than or equals
- Value: 5

Show Images in Your Template Content

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

Add custom rich text fields to your template content so that your sales reps can upload images directly to the Quote object. You can then show samples of your product on your quote document.

- We recommend resizing large images so they don't take up too much space on your quote document.
- Salesforce CPQ quote documents can be up to 2 MB, which includes images and HTML. Make sure that your image doesn't take up too much of your document, and resize if needed.

1. Start by adding a rich text field on your quote.
   a. From Setup, in the Quick Find box, enter *`Objects`*, select **Objects**, and then select **Quote**.
   b. In Custom Fields & Relationships, click **New**.
   c. Set the data type to Text Area (Rich), and then add a field label.
   d. Save your changes.
   e. Add the rich text field to your quote page layout.
2. Next, upload an image to your quote.
   a. Select your rich text field to display the rich text editor.
   b. Select the Insert Image icon.
   c. Insert an image by uploading a file or listing a URL.
   d. Add text and format your image if needed, and then save your changes.
3. To show your image on your quote documents, add a merge field to your desired location in your template content.
   a. Go to the template content that you want to include your image.
   b. Insert a merge field in the HTML template content markup editor.

   For example, if your rich text field has an API name of `laptop_pic__c`, your merge field is `{!quote.laptop_pic__c}`.

Create Template Sections

EDITIONS

Available in: **All** CPQ Editions

Use sections to position and style template content for your quote document.

Sections are blocks of information that contain a piece of template content. For example, you can create a template section record to handle styling and positioning of your quote's line items. In this case, populate the section's Content field with a lookup to the template content you associated with your quote lines. Your quote template can contain multiple template sections, and you can use the same template section in different quote templates.

1. Click **New Template Section** on your quote template's Sections related list.
2. Enter a section name.
3. Choose the content for this section.
4. Enter a number in Display Order. This number determines how the section is positioned on the quote page relative to other sections. Values are ordered top-down with 1 as the highest.
5. Choose a conditional print field. Values for this field refer to a checkbox on the associated quote record. If that field is selected, this section appears on PDF quote documents.
6. If your template section contains line items, you can choose a group field. The quote template will show line items in this section organized by their values for your selected field.

   Use this field only if your template section is associated with template content where Type is set to Line Items.
7. Enter a value for Top Margin and Bottom Margin, in inches, to space each section relative to any section above or below it.
8. If you want to control where page breaks occur in your section, choose values for the page break fields.
9. If you want to group line items in this section by a field, select a value for Group Field.

   Note: Salesforce CPQ ignores Group Field if your quote's Group Line Items field is selected.

Conditionally Display Template Sections
Show sections in your sales rep's quote template based on the values of a quote field. This feature is useful if your documents may include supplementary material based on the type of quote your sales rep is selling. For example, you could show a template section with RFQ information only if your quote was made in response to an RFQ.

Conditionally Display Template Sections

Show sections in your sales rep's quote template based on the values of a quote field. This feature is useful if your documents may include supplementary material based on the type of quote your sales rep is selling. For example, you could show a template section with RFQ information only if your quote was made in response to an RFQ.

EDITIONS

Available in: Salesforce CPQ Summer '14 and later

The template section field Conditional Print Field can contain a value for any quote field. When you create a quote document, Salesforce CPQ checks the value of Conditional Print Field. Your quote document includes the template section only if the value of Conditional Print references these types of quote fields.

- A selected checkbox field
- A formula field that evaluates to true

1. Go to the template section record that you want to display based on conditions.
2. Choose a value for the Conditional Print field.

   This field contains values for Group Line Items and Primary by default, but you can add other quote fields as needed.

Template Line Columns

Organize your quote template with columns that represent quote line fields.

EDITIONS

Available in: **All** CPQ Editions

Line columns are useful for showing the values of important fields on your document. For example, your quote document can have a quantity column and unit price column so that all line items show their values for those fields.

Create line columns from the Line Columns related list on your quote template record.

Column Heading
Title of the column.

Display Order
Salesforce CPQ shows columns from left to right based on this field, starting with the smallest value.

Width
This value represents the percentage of the overall document width taken up by this column. Quote documents sometimes appear incorrectly if the total Width values on your template are not 100.

Section
Specify a template section here if you want this column to appear only in that section. Otherwise, this column appears in all sections.

Field Name
API name for the quote line field you want shown in this column. Salesforce CPQ shows this field's label on the generated document.

Alignment
Choose whether column values are aligned left, center, or right.

You can then adjust the appearance of your line columns with the Style Information and Column Option fields.

Example: Here's a common set of line columns for quote documents:

Column Heading	Display Order	Width	Field Name	Alignment
QTY	10	5.00	SBQQ__Quantity__c	Left
PART #	20	10.00	SBQQ__ProductCode__c	Left
DESCRIPTION	30	50.00	SBQQ__Description__c	Left
UNIT PRICE	40	10.00	SBQQ_ListPrice__c	Right
DISC (%)	50	10.00	SBQQ__Discount__c	Right
EXTENDED	60	15.00	SBQQ__NetTotal__c	Right

Conditionally Display Quote Line Columns
Hide columns in your quote line sections based on the values of a quote field.

Conditionally Display Quote Line Columns

Hide columns in your quote line sections based on the values of a quote field.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

The line column field Conditional Print Field can contain a value for any quote field. When you create a quote document, Salesforce CPQ checks the value of Conditional Print Field. Your quote document includes the line column only if the value of Conditional Print references these types of quote fields.

- A selected checkbox field
- A formula field that evaluates to true

1. From your quote template record, go to the line column record that you want to display based on conditions.
2. Choose a value for the Conditional Print field.

This field contains a value of Group Line Items by default, but you can add other quote fields as needed.

3. Provide a value for the Discard Width When Hidden field.

   When you hide a line column, Salesforce CPQ allocates the width of the hidden column to the nearest displayed line column by default. If you select this field, Salesforce CPQ does not reallocate column width. We recommend selecting this field on any line columns that can be hidden. Quote templates usually look more organized when all line columns are of equal width.

Line Item Print Options

EDITIONS

Available in: **All** CPQ Editions

Quote templates contain many options for customizing the layout of line items in your documents.

Consider these print option fields when customizing your quote template. You can find them on the quote template record.

Group Field
: Quote line groups don’t carry over from the quote line editor to a document. Use this field to organize your line items by the value of your chosen field.

Sub Group Field
: Apply a second level of organization within the field you selected for Group Field. For example, group your line items alphabetically by product code and then organize those groups by a custom Color field.

Hide Component Products
: Hide all product options on your documents.

Number Terms
: Show this template’s quote terms as a numbered list where the numbering begins with 1. Child terms indent by a decimal and one number to the right, such as 1.1 or 1.3.2.

Line Sort Field
: Sort line items in your template by the values of a chosen field. Text fields sort alphabetically. Number fields sort from smallest to largest.

Show Customer Discount
: Show quote-level customer discounts in your quote totals.

Show Partner Discount
: Show quote-level partner discounts in your quote totals.

Show Renewed Products
: Show renewed products on renewal quotes made from this template.

Show All Package Products
: Show all bundle products on quote documents. Otherwise, Salesforce CPQ only shows package products with only nonzero quantities.

Show Bundled Products
: Show quote line items that have their Bundled fields selected on documents made from this template.

Show Discount Schedule
: Choose how to display discount schedules on the quote document. Per Quote Line displays the discount schedule and its tiers right-aligned under each quote line.

Hide Group Subtotals
: Hide group subtotal fields on documents made from this template.

Hide Totals
: Hide total fields on documents made from this template.

Line Numbering

Specify how to number line items on made documents. “Start at quote” numbers all lines in order, starting at 1, across the quote regardless of groups. “Start at group” resets numbers to 1 at the beginning of a group.

Filter Line Items by Template Section

EDITIONS

Available in: Salesforce Winter ’15 and later

Group and display line items in different sections of your quote template. This feature is useful if you want to organize line items by a shared value such as product type or price range. Your sales reps can deliver CPQ quote documents with clearly-organize line item groupings to their customers.

1. From your quote template record, go to the template section records that contains your line items.

   In this example, we’re using line items that have a Product Family field with Hardware, Software, and Warranties as possible values. We want to show 1 family of line items per our 3 template sections.

2. Add the API name of the field you’re filtering by to your template section’s Filter Field field.
3. Use filter fields in each template section to define the line items you want to filter. For example, the Hardware template section could include the following filter field values.
   - Filter Field: SBQQ__ProductFamily__c
   - Filter Operator: Equals
   - Filter Value: Hardware
4. Create a “catch-all” filter for any line items that do not fit within the filtered lists. For example, you could have a section with a filter field of SBQQ__ProductFamily__c, an operator of equals, and a null filter value. This filter would include all your products that do not have a value for their product family.

Print or Hide Totals in Line Item Sections

EDITIONS

Available in: Salesforce CPQ Spring ’16 and later

Customize which of your template sections show totals, subtotals, or discounts for their line items. This feature is useful if you have several template sections with filtered line items.

1. Edit your quote template record and select the **Hide Totals** field.
   Salesforce CPQ hides the grand totals at the bottom of this template’s line item sections.
2. In each of your template’s line item sections, select **Print Quote Totals**.
3. Choose a value for the Summary Display field on each of your line item templates. The value of this field overrides the value of your quote template’s Hide Totals field.

- Always: Show subtotals, discounts, and grand totals in this section.
- Never: Don't show subtotals, discounts, and totals in this section.
- None: Inherit the quote template's Hide Totals field value for this section.

You can also show quote totals outside your line item sections by hiding totals in your template. Then use the `{!quoteTotal}` and `{!quoteSubTotal}` merge fields anywhere in your template content records.

Group Line Items in Quote Templates

EDITIONS

Available in: All Salesforce CPQ Editions

Group a quote document's quote lines by shared values of a standard or custom field. If a quote contains many quote lines with shared field values, grouping lines this way makes related quote documents easier to read.

1. Create a formula field on your quote line object. Make sure that your new formula field and the external field have the same name.

   This field inherits the value of the field on your external object.

2. From Setup, enter *`Objects`*, select **Objects**, and then select **Quote Template**.
3. From the Quote Template page, select **Group Field**.
4. From the Values related list, click **New**.
5. Add the API name of the field you made in Step 1 and click **Save**.
6. On your quote template, find the Group Field field and set its value to the value you added in Step 5.

Tip: Salesforce CPQ can set the heading label for your grouping based off a different field than you use for the rest of your grouped line items. Create a group label field on the Quote Line object using a naming convention of *`[field name]Label__c`*. For example, if the API name of your Group Field is "Required__c," the label field for it would be called "RequiredLabel__c".

Add Company Logos to Quote Templates

EDITIONS

Available in: All Salesforce CPQ Editions

Set your quote template to show a company logo. Company logos help your quote documents look professional and organized.

We recommend the following guidelines for logo image files.

- The final saved resolution is PPI, not DPI.
- 300 PPI is a good starting resolution. Ask for the highest resolution that your marketing department or customer can provide – you can always size down if needed.
- Use a higher resolution for images with more color, information, or complex shapes. High resolutions ensure that the image avoids pixelation and distortion.

1. From the Documents page, select a document folder or click **Create New Folder**.
2. Click **New Document**.
3. Provide a document name.
4. Upload your image.
5. On the document detail page, select Externally Available Image.

   This field indicates that the image is available for HTML email templates, such as a logo in a letterhead. It also indicates that the image doesn't require a Salesforce username and password to view in an email. However, Salesforce CPQ does require a username and password for viewing the image as a custom app logo or custom tab icon.

6. Copy the document ID, which is the string of numbers at the end of the document record's URL.
7. Return to your quote template and enter the document ID in the Logo Document ID field.
8. Click **Save**.

CPQ Document Fonts

Salesforce CPQ supports various fonts on quote documents.

EDITIONS

Available in: All Salesforce CPQ Editions

Available Fonts

Times New Roman

Courier

Helvetica

Dosis

Droid Sans

Droid Serif

Merriweather

Montserrat

Open Sans

PT Sans

PT Serif

Roboto

Roboto Light

Titillium Web

Noto Sans JP (available as of Salesforce CPQ Spring '16)

Noto Sans KR (available as of Salesforce CPQ Spring '16)

Noto Sans SC (available as of Salesforce CPQ Spring '16)

Noto Sans TC (available as of Salesforce CPQ Spring '16)

Salesforce CPQ allows users to pick from Times New Roman, Courier, and Helvetica by default. Admins must add the other fonts to the relevant picklists.

When a user generates a quote document in Microsoft Word, their computer must contain the document's fonts so that the quote document renders properly.

If you're upgrading from a version before Salesforce CPQ Spring '16, add Noto Sans JP, Noto Sans KR, Noto Sans SC, and Noto Sans TC to the relevant font picklists.

CPQ Quote Document Management

After you create your template objects, you can define additional template layout settings, provide translations, and then generate your quote document.

EDITIONS

Available in: **All** Salesforce CPQ Editions

Styling Your CPQ Quote Documents

After you define the components of your quote document, customize its layout.

Generate and Send a CPQ Quote Document

Create a quote document when you're ready to send a quote to a customer.

Enable Batch Document Generation

Automate the Salesforce CPQ process of creating a quote document and sending it to the quote's primary contact. The automation saves times for sales reps working in a high-volume environment.

Let Users Change Output Formats

Salesforce CPQ creates quote documents as PDFs by default. You can add a setting to user profiles that lets users choose between PDF or Microsoft Word .doc output on the Generate Document page.

Translate CPQ Quote Template Content

Define translated values for the variables in your CPQ quote template content. You can define translations in any language that Salesforce supports.

Styling Your CPQ Quote Documents

After you define the components of your quote document, customize its layout.

EDITIONS

Available in: Salesforce CPQ Summer '14 and later

Flexible Page Numbers in CPQ Quote Documents

The quote template record contains several fields that let you control how page numbers appear on PDF quote document pages. Customizing your page number layout lets you organize your quote document based on your company's styling needs. Learn how to use each page number field to customize quote documents for your sales reps.

Document Output Size

Set your document's page size with the Paper Size menu on the Generate Document page. For example, if your sales rep needs to generate a document in Japanese, they would set the output size to A4.

Add Static PDFs to Your Quote Documents

Add a PDF that displays between template section records. The PDF is static, which means that Salesforce CPQ does not change its position when creating your quote document, unlike PDF pages made from template content. This feature is useful if your sales reps want standardized content in their quote documents, such as a certification or corporate overview.

Show Product Image Fields in Quote Documents

If your product record contains a custom image field, you can show that image next to any related quote lines in a quote document. Add the name of your custom image field to a line column record on the quote template where you want to show product images.

Display Watermarks on Draft Quote Document Previews

Add a watermark to the background of quote documents. This way, when your sales reps preview a document on the Generate Document page, they and their users will not confuse a draft quote document with the completed version.

Remove CPQ Quote Document Headers and Footers

Remove headers and footers from the first, last, or first and last pages of your quote template. This feature is useful if you want a title page that doesn't include a header or footer.

Show Discount Schedules on CPQ Quote Documents

Show volume discount schedules, term discount schedules, and price breaks for each quote line on your quote document. Then your sales reps can provide customers with more insight into how their quote line items are priced. Customers might also be more likely to move up to a higher discount tier if they realize their order is close to that next tier.

Flexible Page Numbers in CPQ Quote Documents

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

The quote template record contains several fields that let you control how page numbers appear on PDF quote document pages. Customizing your page number layout lets you organize your quote document based on your company's styling needs. Learn how to use each page number field to customize quote documents for your sales reps.

For example, you could display your page numbers as follows.

- Move the page number so that a footer can occupy the bottom-most part of the page.
- Exclude page numbers on a cover letter, title page, or table of contents.
- Justify the page number left or right, rather than in the page's center.

The quote template record contains the following page number fields.

Exclude Page Numbers
: Defines the pages on your document that do not display page numbering.

Page Number Position
: Specifies where Salesforce CPQ displays page numbers in your document. If this field is left blank, numbers appear in the document's footer.

Page Number Text
: Establishes the layout of the page number text. {0} independently represents the current page. {1} must be used with {0} and represents the total number of pages with page numbers, as in "5 of 27". If this field is left blank, formatting defaults to "Page {0} of {1}".

Page Number Alignment
: Specifies whether the page number is centered, aligned left, or aligned right. If this field is left blank, page numbers are centered.

Document Output Size

EDITIONS

Available in: Salesforce CPQ Spring '17 and later

Set your document's page size with the Paper Size menu on the Generate Document page. For example, if your sales rep needs to generate a document in Japanese, they would set the output size to A4.

The paper size menu provides four options.

Default
: Salesforce CPQ sizes the page according to the quote template's Page Width and Page Height fields.

Letter
: 8.5 inches wide by 11 inches long

Legal
: 8.5 inches wide by 14 inches long

A4
: 8.27 inches wide by 11.69 inches long

Letter, Legal, and A4 options override the quote template's Page Width and Page Height values. This way, you need one single template for your desired size, then override it if needed during document generation.

Note: Exceptionally long text strings—for example, an 8-inch string on a 6-inch wide page— wrap.

Add Static PDFs to Your Quote Documents

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

Add a PDF that displays between template section records. The PDF is static, which means that Salesforce CPQ does not change its position when creating your quote document, unlike PDF pages made from template content. This feature is useful if your sales reps want standardized content in their quote documents, such as a certification or corporate overview.

1. Add the Additional Documents related list and the Notes & Attachments related list to your template section's page layout.
2. Go to the quote template where you want to include a PDF.
3. Choose a template section and then click **Include Document**.
4. Choose the PDF you want to include.
   When sales reps create a quote document that includes this section, they see the PDF where you included it.
5. To include publicly accessible documents, click **New Additional Document** in the Additional Documents related list.

   Important: Salesforce CPQ does not support including publicly accessible documents if they're already in a customer's Salesforce org.

Note: Customers don't see page numbering on PDFs that you've attached to your quote document, though they can see numbers on standard pages.

Show Product Image Fields in Quote Documents

EDITIONS

Available in: All Salesforce CPQ Editions

If your product record contains a custom image field, you can show that image next to any related quote lines in a quote document. Add the name of your custom image field to a line column record on the quote template where you want to show product images.

1. From the object management settings for quote lines, go to Custom Fields & Relationships and then click **New**.
2. Set your field to a Formula type that returns text.
3. On the Enter Formula page, enter the API name of your custom image field.
4. Save your formula field.
5. From your quote template record, choose a line column or create one. This line column shows your product images.
6. Find your line column's Field Name field and give it a value of your custom image field.
7. Save your line column.

Display Watermarks on Draft Quote Document Previews

EDITIONS

Available in: Salesforce CPQ Winter '15 and later

Add a watermark to the background of quote documents. This way, when your sales reps preview a document on the Generate Document page, they and their users will not confuse a draft quote document with the completed version.

Salesforce CPQ displays the watermark image behind the text on each page of your quote document, excluding static PDFs. You can use one of your own images or Salesforce CPQ's standard image. The Salesforce CPQ watermark is located in the Document Assets folder.

1. Create a Document record.
2. Give your document a name and then upload the file you want to serve as the watermark.

Salesforce CPQ has a standard “Draft” watermark image available by default. You can find it in the Document Folder field within the Documents tab of Salesforce CPQ package settings.

3. Select **Externally Available Image** and then click **Save**.
4. Copy the SFDC ID from the URL of your document record.

   Your SFDC ID is the string of letters and numbers following the final slash in your record’s URL.
5. Go to the quote template where you enable the watermark for draft documents. Add your SFDC ID to the Watermark ID field.
6. Save your quote template.

You can create a workflow rule to control when a watermark appears on your quote output. This way, only non-finalized quotes receive a watermark. This workflow should apply to the quote document object.

Remove CPQ Quote Document Headers and Footers

EDITIONS

Available in: Salesforce CPQ Summer ’17 and later

Remove headers and footers from the first, last, or first and last pages of your quote template. This feature is useful if you want a title page that doesn’t include a header or footer.

Note: Salesforce CPQ considers headers as footers as 1 entity, and page numbers as another. Removing headers and footers doesn’t remove page numbers, and vice versa.

1. From your quote template, choose a value for the Exclude Header & Footer field.

To remove both of these entities from your first and last pages, set Exclude Header & Footer to **First and Last**, and then set Exclude Page Numbers to**First and Last** or to **All Pages**.

Show Discount Schedules on CPQ Quote Documents

EDITIONS

Available in: Salesforce CPQ Spring ‘16 and later

Show volume discount schedules, term discount schedules, and price breaks for each quote line on your quote document. Then your sales reps can provide customers with more insight into how their quote line items are priced. Customers might also be more likely to move up to a higher discount tier if they realize their order is close to that next tier.

1. If you’re upgrading from Salesforce CPQ Winter ’16 or earlier, add the Show Discount Schedule field to your quote template’s page layout.

   We recommend placing this field in the Print Options header.
2. In the quote template record where you want to show discount schedules, select a value for the Show Discount Schedule field.
3. Save your changes.

Generate and Send a CPQ Quote Document

EDITIONS

Available in: Salesforce CPQ Winter ‘16 and later

Create a quote document when you’re ready to send a quote to a customer.

1. Go to a quote record and click **Generate Document**.
2. Choose a document language.

   This picklist displays all the languages that Salesforce CPQ supports. We recommend letting your sales reps know which languages you have available for translated quote documents.

   Important: When you want to translate a generated quote into a different language, ensure that you set a specific document language rather than Default. When you select Default, Salesforce CPQ displays only untranslated content. This means that Salesforce CPQ will not display user-translated template content such as merge fields and labels with variable translation values.

3. Choose an output format.
4. Enter a document name.

   This name refers to the document after Salesforce CPQ saves it to its target destination and as a document record. Salesforce CPQ saves the name only when you click **Save** or send it to an external application. Clicking **Preview** alone does not save the name.
5. Choose any other documents you want to add.
6. Choose one of the following actions.

   Save
   Creates the document, saves it to its target destination, and creates a Salesforce CPQ document record.

   Save & Email
   Creates the document and opens a page where you can attach the document to a contact record. You can copy more recipients, create an email, and attach other files.

   Preview
   Opens a sample of your quote document. This sample appears in a pop-up window unless an administrator has enabled Full Page Preview in Salesforce CPQ's package-level configuration settings. Salesforce CPQ does not support downloading or printing preview documents. Instead, select Save, or Save & Email, open your file, and print it from your computer.

   Cancel
   Cancel document creation and return to your quote record.

Enable Batch Document Generation

EDITIONS

Available in: Salesforce CPQ Spring '15 and later

Automate the Salesforce CPQ process of creating a quote document and sending it to the quote's primary contact. The automation saves times for sales reps working in a high-volume environment.

1. If you're using a version of Salesforce CPQ before 27.1, add your org's instance name as a remote site.
   a. From Setup, enter `Remote Site Settings` and then click **Remote Site Settings**.
   b. Click **New Remote Site**.
   c. Provide a name for your remote site.
   d. In the Remote Site URL field, enter *`https://XXX.salesforce.com`*, where *`XXX`* is your instance name.

      Note: The "na" that begins any Salesforce org must be capitalized. For example, *`https://NA35.salesforce.com`*.

   e. Add the Document Status field to your quote page layout.
   f. Fill out the Email Template ID on the quote record. Otherwise, Salesforce CPQ doesn't send the quote document to the quote's primary contact.
2. Enable batch document creation in your org's package settings.

   Admins only need to perform this step once after installing Salesforce CPQ. If the Documents tab doesn't have the Request Authorization button, your org already has batch document creation enabled.
   a. From Setup, enter `Installed Packages` and then click **Installed Packages**.
   b. Find the Salesforce CPQ package and click **Configure**.
   c. From the Documents tab, click `Request Authorization`.
   d. Allow Salesforce CPQ to access your basic information, access and manage your data, and perform requests on your behalf.
   e. Click **Save**.

3. Use the Apex class MassQuoteDocumentSender to define a batch document creation schedule.
   a. Make sure your quotes have values for their primary contacts and quote template IDs.
      MassQuoteDocumentSender picks up only quotes with a pending document status. We recommend creating a workflow rule that changes a quote's document status to Pending when it's ready for document creation.
   b. From Setup, enter *`Apex Classes`* and then click **Apex Classes**.
   c. Click **Schedule Apex**.
   d. Enter a name for your job. For example, you could use "GenDocs."
   e. Use the Apex Class lookup to find and select **MassQuoteDocumentSender**.
   f. In the Schedule Apex Execution section, enter a time range, frequency, start time, and date for your recurring document generation.
   g. Click **Save**.

When Salesforce CPQ performs a batch document generation, it changes the Document Status field of each related quote to either Sent or Failed. The admin running the MassQuoteDocumentSender Apex class also receives an email showing whether the batch generation was successful or failed. If the batch generation failed, the email shows the errors that occurred while the class was running.

In Salesforce CPQ Spring '17 and later, you can control the language of batch-generated quotes on by using the quote's Quote Language field. If this field is blank, the language of batch-generated documents for that quote defaults to the language chosen in your org's user settings. Quote-level language selection lets you establish document language before the generation process begins, making it useful for batch document generation — just make sure all the quotes involved in the batch generation process have a quote language specified. This field works for only batch generation; it doesn't affect document language when a sales rep clicks **Generate Document**. In that case, the rep still has to choose a document language on the Generate Document page.

Let Users Change Output Formats

Salesforce CPQ creates quote documents as PDFs by default. You can add a setting to user profiles that lets users choose between PDF or Microsoft Word .doc output on the Generate Document page.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

1. Check your HTML template content records for embedded images. Add `&contentType=xx` to the end of the URL that references these images, where `xxx` represents the MIME Type field contents on the document detail page of the image.
2. From Setup, in the Quick Find box, enter *`Users`*, and then select **Users**.
3. Select the user whose settings you want to edit.
4. Select **Allow Output Format Change**.
   The Generate Document page for this user shows the Output Format field.

We recommend adding the Output Format field to the Quote Documents related list on your opportunity and quote page layouts. This layout ensures that other users can quickly see whether a quote document is a PDF or a .doc.

> Note: When a sales rep previews a quote, Salesforce CPQ still shows the quote document in their browser's window. The output selection only affects generated quote documents that they save or email.

Translate CPQ Quote Template Content

Define translated values for the variables in your CPQ quote template content. You can define translations in any language that Salesforce supports.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later

1. In the template content record you want to translate, click **Translate**.
2. Select the language you want to translate your variablesinto.

   Important: When you want to translate a quote document, make sure that you select a specific document language rather than **Default**. When you select **Default**, Salesforce CPQ shows only untranslated content. This process means that Salesforce CPQ doesn't show user-translated template content such as merge fields and labels with variable translation values.

3. Complete these fields for each translation you want to make.
   a. Variable Name: Enter your template content variable. Template content variables are written as `{!Text.VariableName}`.
   b. Description: Enter a description of your translation.
   c. Translated Value: Enter the translated value that your template content shows when you translate your quote document into your selected language.
4. Click **Save** to store your translations and return to your template content record, or click **Quick Save** to save your translations and remain on the Translations page.
5. To define translations for other languages, repeat steps 2 through 4.
6. In your template content record, click **Edit**.
7. Add your variables to your template content.

Example: Your company needs Spanish translations for their Quotation and QuoteNumber template content variables, so you define translations for these variables as follows.

Quotation

Variable Name: `{!template.Quotation__c}`

Definition: Label for Quotation

Translated Value: Cita de vente

QuoteNumber

Variable Name: `{!template.QuoteNumber__c}`

Definition: Quote Number

Translated Value: Numero de cita

DocuSign for Salesforce CPQ

The DocuSign for Salesforce CPQ plug-in enables safe and convenient signature management for your CPQ quotes. Your customers can quickly approve quotes and reduce time spent in the CPQ workflow.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

Salesforce CPQ is ready to integrate with the DocuSign plugin. All you need is to install the DocuSign package in Salesforce CPQ. Log a case with Salesforce CPQ support to get the installation links for the DocuSign package.

Important: The DocuSign for Salesforce CPQ plug-in requires the DocuSign Business Pro edition. You can't use the Salesforce Connect option in other editions.

Send a CPQ Quote Document with DocuSign

Send a quote to DocuSign from Salesforce CPQ.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

1. Go to your quote, and click **Generate Document**.
2. On the Generate Document page, click **Send With DocuSign**.
   An email containing a PDF file of the quote document is sent to the your account's primary contact. The document contains electronic signature fields based on how your Salesforce admin configured your DocuSign account.

Prepare Salesforce CPQ for DocuSign

Before you can use DocuSign with Salesforce CPQ, configure key settings and set up DocuSign-related objects for your users.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

Integrate Salesforce CPQ with DocuSign

Define your Salesforce CPQ org's connection to the DocuSign for the CPQ plug-in, and prepare your CPQ objects to receive information from DocuSign.

DocuSign for Salesforce CPQ uses the CPQ package's Quote Template and Quote Document objects.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

1. Log in to your DocuSign account.
2. Go to **Salesforce CPQ** > **Plugin**.
3. For Electronic Signature, enter *`SBQQDS.DocusignPlugin`*.
   Salesforce CPQ adds the Send with DocuSign button to your Generate Document page.
4. On your Quote Document page layout, make the following changes.
   a. Create a DocuSign Information section.
   b. Add the Notes & Attachments related list.
5. On your Quote Template page layout, add the DocuSign Recipients related list.

Configure Remote Site Settings for DocuSign

Configure remote DocuSign settings in Salesforce CPQ. If your Salesforce CPQ org already has certain remote site endpoints defined, you can skip this topic.

You might need to add a remote DocuSign site in Salesforce CPQ. Otherwise, Salesforce blocks DocuSign as it tries to connect. Salesforce CPQ ships with several common remote sites. If your DocuSign account resides in any of them, you can skip this topic.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

- `https://demo.docusign.net`
- `https://na2.docusign.net`
- `https://eu1.docusign.net`

You can find your URL in your browser's address bar. If it's not one of these URLs, take note of it for the following steps.

Note: If you're having trouble verifying your DocuSign endpoint URL, contact DocuSign technical support for confirmation.

1. From Setup, in the Quick Find box, enter *`Security Controls`*, and then select **Remote Site Settings**.
2. Click **New**.
3. Enter your Remote Site name without spaces.
4. Enter your Remote Site URL. Only the domain portion of the endpoint URL is required.
   For example, `https://app2.docusign.com`.
5. Select **Activate**, and then save your changes.

Set Up DocuSign Custom Settings

DocuSign requires that your Salesforce CPQ org uses several organization-wide settings.

Have your DocuSign Account ID ready. You can find this ID in your DocuSign user profile. Select the user profile dropdown menu in the upper-right corner of your DocuSign home page, and then look for the ID numbers below the account name.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

1. From Setup, in the Quick Find box, enter *`Custom Settings`*, and then select **Custom Settings**.

2. In the row containing DocuSign for Salesforce CPQ Settings, select **Manage**.
3. Click **New**.
4. Enter your DocuSign Account ID.
5. Make sure that the Batch Size field has a value of 5.
6. In the Endpoint field, add `/restapi/v2` after the final slash.
   Change `https://docusign.net/` to `https:docusign.net/restapi/v2`.
7. Save your changes.

Set Up DocuSign User Profiles

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

You can give CPQ users access to the DocuSign credentials object by adding a custom link or Visualforce box to their user profile. After you set up the DocuSign credentials object, users can log in to their DocuSign account from Salesforce CPQ. They'll need to be logged in within Salesforce CPQ and DocuSign so that DocuSign can send information to and from both packages.

1. From Setup, in the Quick Find box, enter *`Manage Users`*, and then select **Users**.
2. Go to the user account where you want to add the DocuSign credential field, and click **Edit Layout**.
   You can set up DocuSign in two ways: add a Custom Links section or a Visualforce box.
3. To add the DocuSign setup box to the user's Custom Links section, do the following.
   a. In the User Layout box, select **Custom Links**.
   b. Move the DocuSign for Salesforce CPQ object to the desired position in the Custom Links section.
   c. Click **Save**, and return to the User Detail record.
      Users can click the DocuSign for Salesforce CPQ Setup link in the Custom Links section of their user's profile and enter their DocuSign username and password.
4. To display the DocuSign user setup box as a Visualforce box on the user's profile page, do the following.
   a. In the User Layout box, select **Visualforce Pages**.
   b. Move the SetUpUser object to the desired position on your page layout.
   c. Click **Save**, and return to the User Detail record.
      Users can go to their user profile and enter their DocuSign username and password in the DocuSign for Salesforce CPQ Setup Visualforce page.

Users can now enable their DocuSign license in Salesforce CPQ.

Set Up DocuSign Recipients for CPQ Quotes

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

Create DocuSign recipient records in your quote template. You use these records to map usernames and emails from Salesforce CPQ to DocuSign.

1. Go to the DocuSign Recipients related list in your quote template.
2. Select **New DocuSign Recipient**.
3. Give the recipient a role name.

   The name must be unique within this template and match the appropriate recipient's name in your DocuSign template.

4. Select a Role Type for the recipient.
   - Owner: Inherits name and email from Sales Rep
   - Signer: Inherits name and email from Primary Contact
   - Sender: Inherits name and email from the current user
   - Custom: If you select this type, use the Source Email and Source Name fields to identify which fields on the Quote Document to pull the name and email from. You will need to add the API names of the fields you wish to use to the Source Email and Source Name picklist values before referencing them.
5. Save your record.

Connecting DocuSign to Salesforce CPQ

DocuSign pushes updates from the signature process back into Salesforce CPQ and your quote document record, providing real-time updates on your quote's eSignatures. After you set up a connection to DocuSign within Salesforce CPQ, you can define the connection to Salesforce CPQ in your DocuSign account.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

Connect Your DocuSign Account to Salesforce CPQ
DocuSign Connect creates a relationship between your DocuSign account and your Salesforce CPQ org's DocuSign package. After the relationship is in place, DocuSign and Salesforce CPQ can send and receive data from each other. Define this connection before you set up related fields between the two packages.

Add the Quote Document Object to DocuSign
DocuSign pushes updates from the signature process back into Salesforce CPQ and your quote document record, providing real-time updates on your quote's eSignatures. Configure your DocuSign account to send and receive data from your quote document records.

Connecting CPQ Fields with DocuSign Status Fields
DocuSign uses several fields to track the status of a quote document's signature fields. After these fields receive an update, DocuSign sends field data from the DocuSign app to the quote document record in Salesforce CPQ. You can define the number of fields that pass data between Salesforce CPQ and DocuSign.

Template Content Anchors for DocuSign Fields
An anchor is a text string that acts as a placeholder for DocuSign fields in your template content. After you add an anchor to your template content, you associate it with a DocuSign field in your DocuSign app. When a sales rep sends a quote with template content containing anchors, the PDF shows DocuSign signature fields in the locations of their corresponding anchors. The recipient can then apply their eSignature and return the quote to your sales rep, or forward it to other signers.

Connect Your DocuSign Account to Salesforce CPQ

DocuSign Connect creates a relationship between your DocuSign account and your Salesforce CPQ org's DocuSign package. After the relationship is in place, DocuSign and Salesforce CPQ can send and receive data from each other. Define this connection before you set up related fields between the two packages.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

1. Log in to DocuSign.
2. Go to your profile icon on the upper-right of the page, click the dropdown arrow, and select **My Preferences.**
3. Select **Connected Apps**.
4. Select **Connect** for Salesforce, and then select **Allow** on the Allow Access page.

DocuSign connects with your active Salesforce CPQ org.

Add the Quote Document Object to DocuSign

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

DocuSign pushes updates from the signature process back into Salesforce CPQ and your quote document record, providing real-time updates on your quote's eSignatures. Configure your DocuSign account to send and receive data from your quote document records.

1. From your DocuSign account, go to your user profile and select **Go to Admin**.
2. On the Integrations sidebar, select **Connect**.
3. On the Salesforce connection sidebar, select **Actions**, and then select **Edit**.
4. On the Salesforce Connect Object page, go to the Connect Objects section. Select **New Object**, and then select **Salesforce Object**.
5. Change the object from inactive to active.
6. Set the value of the Select Salesforce Object picklist to Quote Document.
7. Set the Object Name to Quote Document.
8. Enter a description.

Connecting CPQ Fields with DocuSign Status Fields

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

DocuSign uses several fields to track the status of a quote document's signature fields. After these fields receive an update, DocuSign sends field data from the DocuSign app to the quote document record in Salesforce CPQ. You can define the number of fields that pass data between Salesforce CPQ and DocuSign.

When you install the DocuSign for Salesforce CPQ plug-in, Salesforce CPQ creates these fields on your Quote Document object.

- Envelope
- ID
- Error Message
- Signed Date
- Voided Reason

By default, DocuSign links the Envelope Id (string) quote document field with the DocuSign field Envelope ID. However, you can link more fields as needed, even if they're not on your quote document's page layout.

When you connect fields, consider what information you want visible in Salesforce from DocuSign for your company's business requirements. You can use existing fields and define custom fields in both Salesforce CPQ and DocuSign.

We recommend the following setup as a baseline.

Salesforce CPQ Quote Document Field	DocuSign Field
Signature Status (picklist)	Envelope Status
Envelope ID (string)	Envelope ID
Signed Date (date)	Recipient Signed Date
Voided Reason (string)	Envelope Void Reason

We also recommend the following commonly used custom fields and their equivalents.

Salesforce CPQ Quote Document Field	DocuSign Field
Signer Name	Recipient Name
Signer Title	Recipient Title
Envelope Sender (string)	Envelope Sender

Connect CPQ Quote Document Fields to DocuSign
Define the CPQ quote document fields that send data to and receive data from your DocuSign account.

Connect CPQ Quote Document Fields to DocuSign

Define the CPQ quote document fields that send data to and receive data from your DocuSign account.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

1. From your DocuSign account, go to your user profile and select **Go to Admin**.
2. From Integrations sidebar, select **Connect**.
3. On the Salesforce connection sidebar, select **Actions**, and then select **Edit**.
4. Select your quote document object.
5. Go to the Select Where section and match the Salesforce.com field Envelope Id (string) with the DocuSign field Envelope ID.
6. Go to the Update Fields section and match other Salesforce.com fields with DocuSign fields as needed.
7. Save your changes.

Select **Attach DocuSign Documents** if you want DocuSign to attach the completed DocuSign document to the related quote document record. This document is attached on the quote document's Notes and Attachments related list, so make sure that the list is included in your page layout.

Template Content Anchors for DocuSign Fields

An anchor is a text string that acts as a placeholder for DocuSign fields in your template content. After you add an anchor to your template content, you associate it with a DocuSign field in your DocuSign app. When a sales rep sends a quote with template content containing anchors, the PDF shows DocuSign signature fields in the locations of their corresponding anchors. The recipient can then apply their eSignature and return the quote to your sales rep, or forward it to other signers.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

We recommend defining your anchors as capital letters enclosed by forward-slashes slashes. For example, you can use the following anchor fields in template content that contains a signature, a printed name, and a title.

Signature
/SI1/

Printed Name
/PN1/

Title
/TI1/

When you add anchors over a field, the DocuSign app evaluates the field's text and associates it with your field. You can view this association in the AutoPlace section of the field's Signature sidebar and edit it if needed.

DocuSign doesn't hide the anchor text, so we recommend making the fields "invisible" by changing the font color of the text so it matches the background color of your document. For example, you can use the template content's source editor to edit the HTML so each field becomes white: `<p><font color = "white">/S1/<font></p>`

Add DocuSign Signature Fields to Quote Documents
Add anchor tags to your template content and associate them with DocuSign tags.

Add DocuSign Signature Fields to Quote Documents

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

Add anchor tags to your template content and associate them with DocuSign tags.

1. Add anchor tags to your template content in Salesforce CPQ.
   a. Open your template content record.
   b. Place your anchor tags in the location where you want the related eSignature field to appear.
   c. Use the template content's source editor to make your anchor tags match the background color of your quote document.
2. In your DocuSign profile, create a DocuSign template and add DocuSign tags.
   a. From the DocuSign app, select **Templates** on your DocuSign home page, and then select **New**.
   b. Select **Create Template**.
   c. Give your template a name and description.
   d. Provide the names of your recipients.

      We recommend three primary signature roles: Sender, Signer, and Owner. DocuSign requires that you list the Signer, or multiple Signers, before any other role entry.
   e. Provide a message in the Message to all Recipients field.
   f. From the Standard Fields sidebar, drag the DocuSign tags over the related anchor on your template.
3. Associate each DocuSign tag with your template's anchor.
   a. Select your DocuSign tag.
   b. From the Signature sidebar, go to the Location list and view the AutoPlace section. Confirm that the DocuSign tag matches the anchor text that you placed it over.

      If you need to change the anchor text associated with this tag, click **Edit**.
4. Click **Save and Close**.
5. In the DocuSign app, from the Templates section, select your template, and then click **i**. Copy your ID from the Details box.
6. In Salesforce CPQ, go to your quote template, and then paste the ID into the DocuSign Template ID fields.

Create a Custom DocuSign Subject Line

You can customize the default Send with DocuSign subject line.

EDITIONS

Available in: Salesforce CPQ Spring '16 and later with DocuSign for Salesforce CPQ 3.0 and later

By default, documents that you send with DocuSign have the subject line Quote Document *`Document Name`*. Salesforce CPQ stores this subject line in the Value field of the Email Subject custom label available in DocuSign for Salesforce CPQ packages. By default, Value contains `Quote Document {0}`. `{0}` references the title users can assign with the Document Name field on the Generate Document page.

To change the subject, you use the Salesforce translation feature.

1. From Setup, in the Quick Find box, enter *`Translation Workbench`*, and then select **Translation Settings**.
2. Under Custom Labels, and select **email_subject**.
3. Set the Language field to your language.
4. For Translation Text, enter the subject line text you want followed by *`{0}`*. {0} is a placeholder for the title that users enter in the Document Name field on the Generate Document page.
   For example: you can change the subject line to *`Please sign this agreement {0}`*.

   {0} can hold any value that the user enters on the Generate Document page. For example, let's say you want all DocuSign documents to display the current date at the end of the subject line. You could instruct your sales reps to enter the date in the Document Name field on the Generate Document page.
5. Click **Save**.

CPQ Quote Template Fields

Quote templates define the layout of the documents that your sales reps generate from a quote. With certain page layout and field-level security settings, some fields aren't visible or editable.

EDITIONS

Available in: All Salesforce CPQ Editions

Template Information

Default
   Select if this is the default quote template selected when generating quotes.

Deployment Status
   Choose whether users can select this quote template.

- In Deployment: Hide this quote template from users while an admin edits it. Only users with Customize Application permission can see quote templates with this status.
- Deployment: Sales reps can select this quote template after clicking **Generate Document** or **Preview Document**.

Generator Name
   Store the name of a Visualforce page used to generate an XSL:FO tree.

Logo Document ID
   Enter the Document ID from the URL of the document that contains your logo.

Template Name
   Provide a unique name for this template.

Page Information

Margins (Bottom, Left, Right, Top)
The page width in inches. 8.50 is the standard value.

Page Height
The quote document's margins, in inches.

Page Width
The page height in inches. 11.0 is the standard value.

Header/Footer Information

Footer Content
Select template content if you want to use it in the footer of quote documents using this template.

Footer Height
Enter the height of the footer for documents generated from this template.

Header Content
Select template content if you want to use it in the header of quote documents using this template.

Header Height
Enter the height of the footer for documents generated from this template.

Terms & Conditions
Enter default Terms & Conditions text. This text displays at the end of documents generated from this template.

Corporate Information

Company Name, Address, Fax, Phone, and Email fields
By default, a quote template inherits its company name and address information from your organization settings. You can also edit them on the quote template details page.

Company Slogan
Enter a company slogan if you want to display one on your quote documents.

Style Information

Border Color
Enter the HEX code for the table borders.

Font Family
Choose the font family for your quote document. Text on your quote document can use only fields within the template's font family.

Group Gap (px)
Enter the number, in pixels, for the size of the gap that Salesforce CPQ adds between quote line groups in the quote document. Reducing this number closes gaps between sections that may appear following document output.

Group Shading Color
Enter the HEX code for the background of group names and descriptions.

Group Text Color
Enter the HEX code for the text color of group names and descriptions.

Term Body Indent (px)
Enter the number, in pixels, to indent term text from the term's number.

Text Color
Enter the HEX code for the color of all text in generated quote documents.

Print Options

Group Field
Organize the quote document's line items into groups based on shared field values. For example, if you sold desktop cases with different covers, you could group your quote lines by the values of their Color field.

Salesforce CPQ ignores Group Field if your quote's Group Line Items field is selected.

Hide Component Products
Your quote document won't show product options

Hide Group Subtotals
Your quote document won't show group subtotals

Hide Totals
Your quote document won't show quote totals

Line Numbering
Choose how to number line items on the quote document.

- "Start at quote" gives your first line item a value of 1, and then continues to the last line item, even if your quote document contains groups.
- "Start at group" numbers lines in each group, and then resets the numbering to 1 for the first line item in the next group.

Line Sort Field
Order the quote document's line items based on a field value. If the template has a Group Field value, Salesforce CPQ orders lines within each group.

Number Terms
Show ordered numbers for your quote terms.

Roll-Up Field
Choose the quote line field that Salesforce CPQ uses when rolling up line items with a shared value.

Show All Package Products
Show package products on the quote document. If you don't select this value, the quote document shows package products only with non-zero values.

Show Bundled Products
Show quote line items for product options with a selected Bundled field.

Show Customer Discount
Show quote-level customer discounts in the quote total.

Show Partner Discount
Show quote-level partner discounts in the quote total.

Show Renewed Products
Show renewed products on your quote document.

Sub Group Field
If your quote template uses groups, you can further group line items in each group by shared values from a different field.

Advanced Approvals

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Automate and customize your approval process with the Advanced Approvals package for Salesforce CPQ. You can require approvals when records meet certain conditions, automate resubmitted approvals, and control the order that approvers receive requests.

Advanced Approvals uses approval rules to determine which approvers receive an approval request and the email template used to send the requests. When a sales rep submits a record for approval, such as a quote or opportunity, the Advanced Approvals package evaluates the package's approval rules. If any of those rules meet their conditions, the rule runs and Salesforce CPQ sends approval request emails to your approvers. Users or user groups with approval permissions in your org can be approvers. Approval chains allow you to send requests to a series of approvers in sequence. The record is not approved until all approvers in all chains have confirmed their approval.

When an approval rule runs, Advanced Approvals also makes an approval record for each approver who received an approval request. The approval record includes information about the status of the approval request as it moves through approvers. Both the submitted record and the corresponding approvals have approval status fields allowing admins and sales reps to track their position in the approval process.

Preview or Submit a Record for Approval

When you've finalized your opportunity or quote, you can submit it for approval using the Advanced Approvals package.

Reassign Approvers with Advanced Approvals

Use Advanced Approvals to easily reassign all an approver's approval records to a different approver. This way, you don't have to go to each approval record and assign it to your new approver.

Resend an Advanced Approval Request

If a sales rep sent an approval request and hasn't heard back yet, you can resend the approval request to remind the approver to respond.

Setting Up Advanced Approvals

Advanced Approvals requires several objects, buttons, and settings so that it can work with Salesforce CPQ.

Approvers and Approver Groups

An approver is a user who receives approval request emails. The approver can approve or reject an approval request within the Salesforce CPQ Advanced Approvals package. An approver record can represent either one user or a user group. An approver group is useful when you want to send approvals to every member of a related team.

Approval Rules

Create approval rules to control who receives an approval request or rejection notice and the email templates that deliver these messages.

Approval Chains

Use an approval chain to send an approval to several approvers simultaneously. When the approval process is completed, Advanced Approvals moves to the next step of approval rules.

Advanced Approval Emails

The Advanced Approvals package sends Visualforce emails in response to sales rep and approver actions. You can define templates for each type of email and associate them with an approval rule.

Smart Approvals

When sales reps resubmit a recalled or rejected record for approval, it can require approval from only the approvers or approval groups that initially rejected it.

[Managing Advanced Approval Permissions](#)

Admins and sales reps require different types of permissions based on the actions they want to perform in Advanced Approvals.

[Advanced Approvals Package Settings](#)

Advanced Approvals package settings define Advanced Approvals features and standards across your Salesforce org.

Preview or Submit a Record for Approval

When you've finalized your opportunity or quote, you can submit it for approval using the Advanced Approvals package.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. From the opportunity or quote, click **Preview Approvals**.

   Advanced Approvals shows a list of the approval rules that run when you click Submit for Approval.

2. Review the approval rules to make sure that the correct approval conditions are defined.
3. Click **Submit for Approval**.

Reassign Approvers with Advanced Approvals

Use Advanced Approvals to easily reassign all an approver's approval records to a different approver. This way, you don't have to go to each approval record and assign it to your new approver.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. From an approval record with a Requested status, click **Reassign**.
2. In the Replace With field, enter the name of the new approver.
3. Click **Replace**.

   The approval record changes its Assigned To field to the new approver.

Resend an Advanced Approval Request

If a sales rep sent an approval request and hasn't heard back yet, you can resend the approval request to remind the approver to respond.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

When a sales rep asks you to resend their approval request, use the following steps.

1. From the record that still needs approval, click **Resend Request**.

   Advanced Approvals shows the Approval Requests page, which contains all your object's approval records with a status of Requested.

2. Select the approval records you want to resend, then click **Select**.
3. Click **Resend Request**.

You can resend an approval request for a single record. From the record's Approvals related list, click **Resend Request** next to the approval.

Setting Up Advanced Approvals

Advanced Approvals requires several objects, buttons, and settings so that it can work with Salesforce CPQ.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

[Enable an Object for Advanced Approvals](#)
Advanced approvals are enabled for opportunities by default. However, most sales reps also need to use advanced approvals on quotes or other objects. Configure an object to work with Advanced Approvals.

[Create Advanced Approvals Buttons](#)
Create buttons that let sales reps submit or recall a record for approval. Then add these buttons to the objects you've enabled for approval.

[Set Up Page Layouts for Advanced Approvals](#)
Add important buttons, fields, and field values to objects that interact with Advanced Approvals.

[Set Up Email Service for Advanced Approvals](#)
Set up an email service and email service address for Advanced Approvals. When an approver replies to an approval email, your org's email service allows Advanced Approvals to apply their response to a record.

Enable an Object for Advanced Approvals

Advanced approvals are enabled for opportunities by default. However, most sales reps also need to use advanced approvals on quotes or other objects. Configure an object to work with Advanced Approvals.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

In this example, we enable approvals for the Quote object. However, you can enable approvals on any object you'd like. For every instance of Quote in the following steps, just replace *`Quote`* with the name of the object.

1. Create a field on the Approval object.

   Make the field visible, but not on the page layout.

   - Data Type: Lookup
   - Field Name: Quote
   - Related to: Quote

2. Create a picklist field on the Quote object.

   - Name: Approval Status
   - API Name: ApprovalStatus__c
   - Values:
     - Pending
     - Approved
     - Rejected
     - Recalled

3. Create a date field on the Quote object. This field stores the submitted date for the approval.

   - Name: Submitted Date

- API Name: SubmittedDate__c

4. Create a user lookup field on the Quote object. This field stores the user record for the user who submitted the quote for approval.
   - Name: Submitted User
   - API Name: SubmittedUser__c
5. If you're enabling advanced approvals on quotes, make sure the quote validation rule Invalid_First_Segment_term_end_Date is inactive.
6. From Setup, in the Quick Find box, enter *Apex Classes*, and then select **Apex Classes**.
7. Create an Apex class titled QuoteExtController and add the following code. Remember, if you're enabling an object other than quotes, replace *Quote* with the object's name.

```
public with sharing class QuoteExtController {
 private Id quoteId;
 public QuoteExtController(ApexPages.StandardController stdController) {
  quoteId = stdController.getId();
 }
 public PageReference onSubmit() {
  if (quoteId != null) {
   SBAA.ApprovalAPI.submit(quoteId, SBAA__Approval__c.Quote__c);
  }
  return new PageReference('/' + quoteId);
 }
 public PageReference onRecall() {
  if (quoteId != null) {
   SBAA.ApprovalAPI.recall(quoteId, SBAA__Approval__c.Quote__c);
  }
  return new PageReference('/' + quoteId);
 }
}
```

8. Create another Apex class and title it QuoteExtControllerTests. This is a test class for the class you made in Step 6. In the class body of QuoteExtControllerTests, add the following code.

```
@isTest
private class QuoteExtControllerTests {

    testMethod static void testSubmit() {
        SBQQ__Quote__c quote = new SBQQ__Quote__c();
        insert quote;

        Test.startTest();
        QuoteExtController con = new QuoteExtController(new
ApexPages.StandardController(quote));
        con.onSubmit();
       quote = [SELECT ApprovalStatus__c FROM SBQQ__Quote__c WHERE Id = :quote.Id LIMIT
 1];
        Test.stopTest();

        System.assertEquals('Approved', quote.ApprovalStatus__c);
    }

    testMethod static void testRecall() {
```

```
        SBQQ__Quote__c quote = new SBQQ__Quote__c();
        insert quote;

        Test.startTest();
        QuoteExtController con = new QuoteExtController(new
ApexPages.StandardController(quote));
        con.onRecall();
       quote = [SELECT ApprovalStatus__c FROM SBQQ__Quote__c WHERE Id = :quote.Id LIMIT
 1];
        Test.stopTest();

        System.assertEquals('Recalled', quote.ApprovalStatus__c);
    }
}
```

Create Advanced Approvals Buttons

Create buttons that let sales reps submit or recall a record for approval. Then add these buttons to the objects you've enabled for approval.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

In this example, we create buttons for the Quote object. However, you can create buttons for any CPQ object that you'd like. Just replace *`Quote`* with the object label and *`Quote__c`* with the object's API name.

1. Create Visualforce pages for your buttons.
   a. From Setup, in the Quick Find box, enter *`Visualforce Pages`*, and then select **Visualforce Pages**.
   b. Click **New**.
   c. Create a button that sales reps can use to submit a record for approval. Use the following values.
      - Label: Submit Quote
      - Name: Submit Quote
      - Visualforce Markup:

      ```
      <apex:page standardController="SBQQ__Quote__c" extensions="QuoteExtController"
      action="{!onSubmit}">
      <apex:pageMessages  />
      </apex:page>
      ```

   d. Create a button that sales reps can use to recall quotes. Use the following values.
      - Label: Recall Quote
      - Name: Recall Quote
      - Visualforce Markup:

      ```
      <apex:page  standardController="SBQQ__Quote__c" extensions="QuoteExtController"
      action="{!onRecall}">
      <apex:pageMessages  />
      </apex:page>
      ```

2. Create buttons and link them to your Visualforce pages.

a. From Setup, in the Quick Find box, enter `Quotes` select **Quotes**, and then select the object that your sales reps will use for approvals.

b. From the Buttons, Links, and Actions related list, click **New Button or Link**.

c. Create the following three buttons. For each button's Display Type field, select a value of Detail Page Button.

Button Name	Display Type	Detail Page
Submit for Approval	VisualForce Page	SubmitQuote
Recall Approval	VisualForce Page	RecallQuote
Preview Approval	PreviewQuoteApproval-URL	/apex/sbaa__PreviewApprovals?Id={!SBQQ__Quote__c.Id}

Set Up Page Layouts for Advanced Approvals

Add important buttons, fields, and field values to objects that interact with Advanced Approvals.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Advanced Approvals can interact with any CPQ object. In the first two steps, use the object that you've already enabled for Advanced Approvals.

1. On your object's page layout, add the Submit for Approval, Recall Approval, and Preview Approval buttons.
2. On your object's page layout, add the Approval related list.
3. On your Approvals page layout, add the Approve button and the Reject button.
4. If you're using an object other than Opportunities for approval, add that object's API name as a value in the following locations.
   - The approval chain field Target Object
   - The approval rule field Target Object
   - The approval variable field Target Object

Set Up Email Service for Advanced Approvals

Set up an email service and email service address for Advanced Approvals. When an approver replies to an approval email, your org's email service allows Advanced Approvals to apply their response to a record.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. From Setup, enter `Email Administration`, and then select **Deliverability**.
2. Make sure that the Access picklist has a value of All email.

   This value ensures that approvers always receive approval requests.
3. Define an email service.

   a. From Setup, enter `Email Services`, and then select **Email Services**.

   b. Click **New Email Service**.

   c. For the email service name, enter **Approval Services**.

   d. In Apex Class, search for `ApprovalEmailHandler`, and then select ApprovalEmailHandler.

e. In the Accept Email From field, enter the email domains that you want to use, with multiple domains separated by a comma and a space. For example, you could enter `gmail.com, yahoo.com`.
f. Select the Active field.
g. In the Failure Response Settings section, select a value of Bounce message for all the action fields.
h. Select Enable Error Routing.
i. From the Route Error Emails to This Email Address field, enter the email of the Salesforce admin who handles this advanced approvals package.
j. Click **Save**.

4. Next, define an email address to use with your email service.
   a. From the Email Service: Approval Services page, click **New Email Address**.
   b. Provide a name for your email address.
   c. In the Email Address field, enter `approval_services`.
   d. Select the Active field.
   e. In the Accept Email From field, enter the email domains that you want to use. We recommend that these are the same domains you provided in your email service record.
   f. Click **Save**.

Approvers and Approver Groups

An approver is a user who receives approval request emails. The approver can approve or reject an approval request within the Salesforce CPQ Advanced Approvals package. An approver record can represent either one user or a user group. An approver group is useful when you want to send approvals to every member of a related team.

For example, you can create an approver group containing all managers in the accounting department. You then associate that group with an approval rule that fires when a quote has a net total of $500,000 or greater. In this way, each accounting manager is sent an email and informed of the request.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Assign Approvers Dynamically Based on Criteria

You can specify an approver based on a formula or criteria. For example, you want the approver to be the regional manager related to a sales rep's opportunity. If the regional manager changes, the new manager is referenced.

Approver Fields

Depending on the page layout and field-level security settings, not all approver fields are visible or editable.

Assign Approvers Dynamically Based on Criteria

You can specify an approver based on a formula or criteria. For example, you want the approver to be the regional manager related to a sales rep's opportunity. If the regional manager changes, the new manager is referenced.

To set up a dynamic approver, you add a custom formula field that references the ID of the approver's user record to your quote or opportunity. You then reference this formula field in your approval rule.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. From Setup, enter `Objects`, and select **Objects**.
2. Select the quote or opportunity.
3. In the Custom Fields & Relationships section, click **New**.
4. For the data type, select **Formula**, and click **Next**.
5. Enter a field label and API name.
6. For the formula return type, select **Text**, and click **Next**.
7. Enter your formula. In this example, we are referencing the manager of the user that created the quote or opportunity record, for example, `CreatedBy.Manager.Id`.

   Make sure that all possible users for this field have approver credentials.
8. Define your field-level security, and then save your field.
9. Go to your approval rule, and click **Edit Layout**.
10. From Setup, enter `Objects`, and select **Objects**.
11. Select **Approval Rule**, and then select **Approval Field**.
12. In the Values list, click **New**.
13. Add the API name of the field you named in Step 5.

Approver Fields

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Depending on the page layout and field-level security settings, not all approver fields are visible or editable.

Delegated Approver
This approver receives approval requests instead of the approver defined by the User or Group ID fields. Selecting a delegated approver is useful if you want an approver to remain active for a limited time. For example, you could have an employee be a temporary approver for a user who has taken medical leave.

Delegation End
Delegated approvers don't receive requests after this date.

Delegation Start
Delegated approvers don't receive requests until this date.

Group ID
If the approver represents a group, this field looks up to that Group record's ID.

Unanimous
If the approver represents a group, the request is not considered approved until all members of the group approve it.

User
If the approver is a single user, this field looks up to that person's User record.

Approval Rules

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Create approval rules to control who receives an approval request or rejection notice and the email templates that deliver these messages.

When a sales rep submits a record for approval, Salesforce CPQ evaluates all the active approval rules targeting that record's object. If any of the approval rules meet their approval conditions, the rule fires, and Salesforce CPQ sends an approval request email to an approver or group of approvers. You provide a lookup to the approver on the approval rule record.

Each approval rule contains optional lookups to a request template, approval template, and rejection template. You can configure your rule so it sends a certain type of email based on your conditions.

Let's look at a few basic approval rule examples.

- If your sales rep submits a quote with a net total over $100,000, your approval rule sends approval request emails to your company's accounting department.
- If your sales rep submits a quote that contains over 10 premium servers, your approval rule sends an approval request email to your company's VP of Information Technology.
- If your sales rep submits an opportunity with over 500 line items, your approval rule sends an approval request email to all your company's VPs.

You can include several conditions on your rule and use them within conditional logic. Consider these examples.

- Your rule fires if only one of the following conditions is true.
  - The quote has a net total of $500,000 or greater.
  - The quote has over 1,000 line items.
- Your rule fires if the first condition is true and the second condition is false.
  - The quote contains a 500-kilowatt generator
  - The quote does not contain a warranty.

Approval Variables

An approval variable references data for evaluation within an approval condition. Use approval variables when you want a tested variable that contains more information than the value of a single field. For example, your approval variable can summarize the total number of opportunity products that contain "Premium" in their name across your opportunity.

Track Changes to Approval Values

The Tracked Field object, on an approval rule, tracks changes to a field on a record that a sales rep submitted for approval. When the approval rule runs, Advanced Approvals stores information about the change in a Tracked Value record. Users can review tracked values to see what changes were made at various stages of the approval process. Add a tracked field record to your approval rule.

Create an Approval Rule

Add an approval rule to your approval process and define the templates and target objects for your approval actions.

Approval Rule Fields

Approval rules define the conditions under which Advanced Approvals sends an approval request to approvers. With certain page layouts and field-level security settings, some fields aren't visible or editable.

Approval Condition Fields

An approval rule runs when it meets its approval conditions relative to the rule's Conditions Met field.

Approval Variables

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

An approval variable references data for evaluation within an approval condition. Use approval variables when you want a tested variable that contains more information than the value of a single field. For example, your approval variable can summarize the total number of opportunity products that contain "Premium" in their name across your opportunity.

Let's look at some important approval variable fields.

Aggregate Field
: Your approval variable performs the aggregate function's action on this field. For example, if you want to find the average partner discount across all your quote lines, your example looks up to your quote line's Partner Discount field.

Aggregate Function
: Pick the action to perform on your aggregate field.

Combine With
: Provide another approval variable to combine with this approval variable. Advanced Approvals returns the result of that combination as the output of this approval variable. For example, you want your variable to combine the total number of quote lines containing "Tablet" with another approval variable that counts the number of quote lines containing "Laptop." If you have 20 tablet quote lines and 10 laptop quote lines, your first approval variable returns a value of 30. Your second approval variable returns a value of 10.

Filter Field
: Pick a field if you want to filter your target object based on a certain value. For example, you can evaluate only quote lines with a Product Family field set to Hardware.

Filter Value
: Pick a value if you're filtering your target object.

Operator
: Choose the operator to use with your filter.

Type
: Summary approval variables evaluate several fields, while discount approval variables evaluate a list price and a net price. If you're using a summary approval variable, provide values for the Filter Field and Filter Value fields. If you're using a discount approval variable, provide values for the List Variable and Net Variable fields.

Example: This approval variable returns the highest quantity value among opportunity product lines that contain "W012671" in their product code field.

- Target Object: Opportunity Product
- Aggregate Field: Quantity
- Aggregate Function: Max
- Filter Field: ProductCode
- Filter Value: W012671
- Operator: Equals
- Type: Summary

Create Approval Variables
Create an approval variable and reference it as one of your approval rule's approval conditions.

[Approval Variable Fields](#)

When you use Advanced Approvals, you can create or modify approval variables to reference data within an approval condition. Some fields aren't visible or editable depending on the page layout and field-level security settings.

Create Approval Variables

Create an approval variable and reference it as one of your approval rule's approval conditions.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. Go to your approval variables object, and click **New**.
2. Enter a variable name.
3. Choose the target object.
4. Choose the type.
   a. If you select **Summary**, enter values for the following fields.
      - Aggregate Field
      - Aggregate Function
      - Filter Field
      - Filter Value
      - Operator
      - Combine With
   b. If you select Discount, enter values for the following fields.
      - List Variable
      - Net Variable
5. Click **Save**.

Example: This approval variable returns the highest quantity value of opportunity product lines that contain "W012671" in their product code field.

Target Object
Opportunity Product

Aggregate Field
Quantity

Aggregate Function
Max

Filter Field
ProductCode

Filter Value
W012671

Operator
Equals

Type
Summary

Approval Variable Fields

When you use Advanced Approvals, you can create or modify approval variables to reference data within an approval condition. Some fields aren't visible or editable depending on the page layout and field-level security settings.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Aggregate Field

Specifies which field is used by the aggregate function. For example, if you want to find the average partner discount across all your quote lines, the aggregate field would be Partner Discount and the aggregate function would be Average.

Aggregate Function

Specifies the action to perform on the aggregate field. See Aggregate Field.

Combine With

Indicates whether another approval variable is combined with this approval variable. For example, you want your variable to combine the total number of quote lines containing "Tablet" with another approval variable that counts the number of quote lines containing "Laptop." If you have 20 tablet quote lines and 10 laptop quote lines, your first approval variable returns a value of 30, while your second approval variable returns a value of 10.

Filter Field

Specifies which field to filter your variable by. For example, if you want to only with a Product Family of Hardware, the filter field would be Product Family, the filter value would be Hardware, and the operator would be Equals.

Filter Value

Specifies the value to use when filtering your variable by a field. See Filter Field.

List Variable

If you're using a discount-type approval variable, provide a list price value used in discount calculation. Advanced Approvals calculates the discount as ((1-(Net Variable/List Variable))*100.

Net Variable

If you're using a discount-type approval variable, provide a net price value used in discount calculation. Advanced Approvals calculates the discount as ((1-(Net Variable/List Variable))*100.

Operator

Determines how the field is filtered.

Type

Choose whether the approval variable is a summary or discount type. Summary approval variables evaluate multiple fields that are defined by the Filter Field and Filter Value fields. Discount approval variables evaluate a list price and net price that are defined by the List Variable and Net Variable fields.

Track Changes to Approval Values

The Tracked Field object, on an approval rule, tracks changes to a field on a record that a sales rep submitted for approval. When the approval rule runs, Advanced Approvals stores information about the change in a Tracked Value record. Users can review tracked values to see what changes were made at various stages of the approval process. Add a tracked field record to your approval rule.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

First, add the value and API name of the field that you want to track to the Tracked Field field on the Tracked Field object. Then, create your tracked field record on your approval rule.

1. From Setup, in the Quick Find box, enter `Objects`, then select Objects.
2. Select **Tracked Field**.
3. From the Custom Fields & Relationships table, select the Tracked Field field.

4. From the Values related list, click **New**.
5. Enter the value and API name of the field you want to track, and then save your changes.
6. From your approval rule, go to the Tracked Fields related list and click **New**.
7. Choose your tracking type.
   - All Values: The approval rule creates a Tracked Value record for your tracked field every time the rule fires, even if the tracked field did not change. This also occurs if the Tracking Type field is left blank.
   - Any Change: When your approval rule fires, it creates a Tracked Value record only if the tracked field changes.
8. Choose the tracked object.

   This is the object that contains your tracked field. By default, you can choose opportunity. If you want to track a field on a different object, add the object's value and API name to this field.
9. Choose the tracked field.

   This is the field that the approval rule monitors for changes.

Create an Approval Rule

Add an approval rule to your approval process and define the templates and target objects for your approval actions.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. Go to your Approval Rules object page, and click **New**.
2. Name the rule.

   This is the only required field.
3. In the Target Object field, choose which object to target.

   If you don't choose an object, the default is the Opportunity object.
4. Enter a number for the approval step.
5. Choose each Advanced Approval template that you want to use.
6. If you're using approval or rejection templates, use the Approval Recipients field or Rejection Recipients field to notify users other than the approvers of the approval's status.
7. To always evaluate this rule, select **Active**.
8. Choose a value for Conditions Met.

   If you're using logic to evaluate more than one condition, choose **Custom**, and create the logical grouping values. To create logic tiers, click **Edit Logic**.
9. Choose the approver.

   The approver can be a single user or an approval group.
10. To chain the approvers, add an approver chain.
11. To fire this rule only during certain dates, enter the start and end dates.

Approval Rule Fields

Approval rules define the conditions under which Advanced Approvals sends an approval request to approvers. With certain page layouts and field-level security settings, some fields aren't visible or editable.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Approval Rule Fields

Active
: Salesforce CPQ evaluates active approval rules when you submit a quote for approval.

Advanced Condition
: If you're using multiple approval conditions and want to evaluate them based on logic other than the Conditions Met field, define your logic here.

Approval Chain
: Approval chains send an approval to several approvers in sequence or in parallel paths. If your approval rule fires and looks up to an approval chain, the rule sends the approval to the first approver on the chain.

Approval Step
: Advanced Approvals evaluates rules with lower steps first.

Approval Template
: Sales reps receive an email with this template when the object they submitted for approval is approved.

Approver
: When this rule fires, it sends the approval request to the user or group referenced by this approver record.

Effective Date Field
: Lookup to a date field on the object this rule evaluates for approval. Salesforce CPQ compares this rule's effective start date and effective end date against the value of that field.

Effective End Date
: Salesforce CPQ does not evaluate this rule after this date. This field is optional.

Effective Start Date
: Salesforce CPQ does not evaluate this rule before this date. This field is optional.

Excluded Statuses
: Salesforce CPQ does not apply this rule to approvals with any of the chosen statuses.

Override Field
: Lookup to a field that overrides the value of your approval rule's conditions.

Reevaluate Smart Approvals Individually
: Re-evaluate smart approval conditions even if this rule's Conditions Met field has a value of All or Custom. If any smart approval condition returns true, the re-evaluation stops, and Salesforce CPQ considers all this rule's conditions to be met.

Parallel
: All approvals at an approval step happen in parallel. Select this field only if you're using Advanced Approvals with native approvals.

Rejection Template
: Sales reps receive an email with this template when the object they submitted for approval is rejected.

Request Template
: Sales reps receive an email with this template when approvers request more information or actions for the approval process.

Require Explicit Approval
: When an approver completes an approval that this rule created, Salesforce CPQ also approves all of that user's other approvals. However, if this field is active, users must manually approve each of their approvals instead.

Approval Condition Fields

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

An approval rule runs when it meets its approval conditions relative to the rule's Conditions Met field.

Approval Rule
: This rule evaluates the approval condition. If the condition was created from an approval rule's related list, Advanced Approvals automatically provides a value for this field.

Enable Smart Approval
: When a sales rep resubmits an approval, Advanced Approvals sends approval request emails only to the approvers that had rejected the approval.

Index
: If the approval rule evaluates several conditions in a logical statement, provide a value for referencing each condition in the statement. For example, you assign an index value of 1 and use it in the statement 1 OR (2 AND 3).

Filter Field
: Provide a lookup to a field. The condition evaluates its tested field or variable against this field.

Filter Type
: The type of filter that the condition tests against.

Filter Value
: Enter a text value. The condition evaluates its tested field or variable against this static value.

Filter Variable
: Provide a lookup to an approval variable. The condition evaluates its tested field or variable against this variable.

Tested Field
: The condition evaluates this field against the condition's filter field, filter value, or filter variable.

Tested Variable
: The condition evaluates this approval variable against the condition's filter field, filter value, or filter variable.

Example: This condition evaluates whether the quote's Net Amount field has a value over 1,000.

Tested Field
: SBQQ__NetAmount__c

Operator
: Greater Than

Filter Type
: Value

Filter Value
: 1000

Approval Chains

Use an approval chain to send an approval to several approvers simultaneously. When the approval process is completed, Advanced Approvals moves to the next step of approval rules.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

An approval chain represents a series of approvals that must happen in a specific sequence. Each part of the chain represents an approval rule with a shared Approval Chain field value and an increasing Approval Step field value. For example, you can set up a chain that sends approvals through each management level of your finance team. When the accountant approves an approval, the finance manager receives an approval email. When the finance manager approves, the VP of finance receives an approval email. The request is not fully approved until the VP of Finance provides their approval.

Approval Rule 1

Approval Chain: 1

Approval Step: 1

Approver: Accountant

Approval Rule 2

Approval Chain: 1

Approval Step: 2

Approver: Finance Manager

Approval Rule 3

Approval Chain: 1

Approval Step: 3

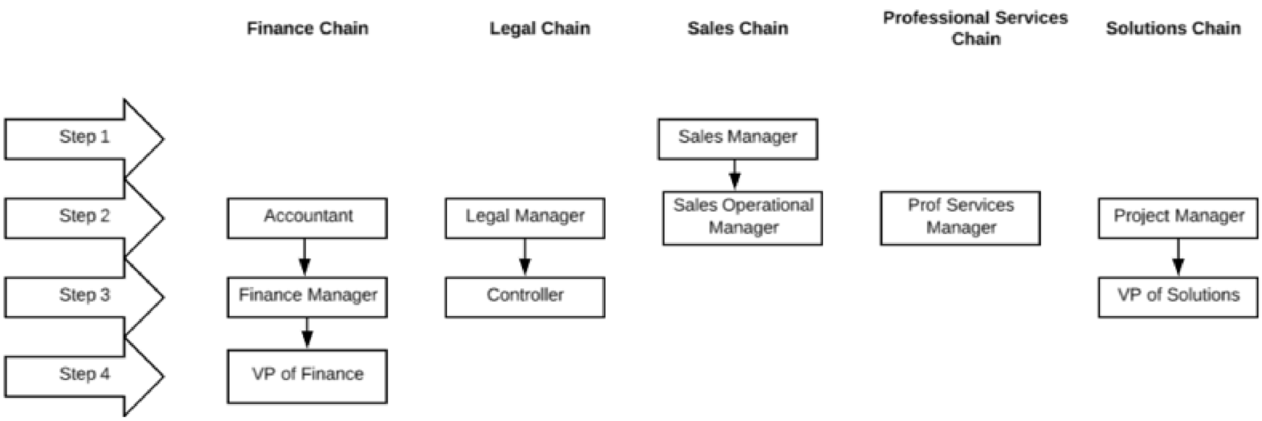
Approver: VP of Finance

You can also run several approval chains simultaneously. In this case, a chain is initiated only when Advanced Approvals reaches the related approval step. After it's initiated, a chain moves through its steps independent of other chains. This way, higher levels of the approval process don't get bottlenecked if one approver takes a long time to respond. After all chains complete their highest approval steps, the approval process is completed and the record is approved.

Let's look at a complex approval process with several chains.

If a quote has a net total greater than $1,000,000, the sales rep must receive approval from all five of your company's managed service teams. Your sales rep's manager must approve the record first. Then, the approval progresses to the initial step of all the other teams, and the last step of the sales team at the same time.

We've outlined this approval path in the following diagram. Each box represents a unique approval rule, where the text inside matches the rule's approver. The columns represent each rule's Approval Chain field, while the rows represent each rule's Approval Step.



Remember, all chains must approve the request before the record is approved. In this case, the VP of Finance is the last approver.

Set Up Approval Chains
Add an approval chain to your approval rule.

Set Up Approval Chains

Add an approval chain to your approval rule.

1. From the Approval Chain object, click **New**.
2. Give your chain a name.
3. Choose a target object.

   Opportunity is available by default. If you want a different target object, add it as a value to the approval chain's Target Object field.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Advanced Approval Emails

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

The Advanced Approvals package sends Visualforce emails in response to sales rep and approver actions. You can define templates for each type of email and associate them with an approval rule.

The approval process requires at least an approval request template associated with your approval rule. When a sales rep submits a record for approval, all approvers for that approval rule receive the request email.

You can also create email templates for the following types of Advanced Approvals actions.

- Approval: When an approver approves one of their approval requests, the sales rep and other approvers in the approval chain receive an email.
- Rejection: When an approver rejects an approval request, the sales reps and other approvers in the approval chain receive an email.
- Recall: When a sales rep wants to correct or revise a record before it's approved, they can send out a recall email to all approvers.

An approval rule record contains lookups to all four types of templates. That way, you can associate different types of a certain template with different rules. For example, you might want different language in a rejection email for a discount-based approval rule than you want for a markup-based approval rule.

[Set Up Advanced Approval Email Templates](#)

Create a Salesforce email template and link it with an Advanced Approvals email template record. Your advanced approval process sends this email in response to a request, rejection, recall, or approval.

[Schedule Approver Reminder Emails](#)

Use a workflow rule to send a reminder email to approvers who haven't responded to an approval request in a set amount of time.

Set Up Advanced Approval Email Templates

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Create a Salesforce email template and link it with an Advanced Approvals email template record. Your advanced approval process sends this email in response to a request, rejection, recall, or approval.

Your approval rule contains lookup fields for request, approval, rejection, and recall emails. We recommend creating email templates for all four and assigning them to your approval rules. We'll walk through setting up a request email, but you can follow the same steps for your rejection, recall, and approval. All you have to change are their names and the Salesforce email's text.

1. Create a Salesforce email request template.
   a. From Setup, in the Quick Find box, enter `Communication Templates`, and then select **Email Templates**.
   b. Select **New Template**.
   c. Select **Visualforce** as the email template type, and then click **Next**.
   d. Enter your email template information. For this example, we'll use "Request Template."
   e. Choose the folder where you want to store your email template.

      Make sure that the folder is publicly accessible if you want your email template to be publicly accessible.
   f. Select **Available For Use**.
   g. Enter your email template name and template unique name.
   h. Choose your encoding, description, and email subject, and then set User as your recipient type.
   i. Choose Approval (SBAA__Approval__c) as your "Related to type."
   j. Save your changes.
   k. Repeat this process for your rejection, approval, and recall templates.
2. Create an Advanced Approval email template record.
   a. In your email templates object, click **New**.
   b. Enter your email template name.

      Because you're connecting this approval template to the template you made in Step 1, you can name it "Approval Request Template."
   c. In the Template ID field, enter the ID of the Salesforce request template you made in Step 1.

      You can find the ID by going to your Salesforce approval request template, finding the URL in your browser, and copying the string of numbers and letters after `salesforce.com/`.
   d. Click **Save**.
3. In your template, click **Edit Template** to add the text and any markup you want to show in your approval email. The email template must contain a reference to the ID of your approval record.

Because users don't have to see this code, you can add style tags so that the text doesn't appear on the approval email. We recommend styling the code's text color as white, because most emails have a white background color. Write your code as follows, replacing `ID` with your approval record's ID: `<p "style=color:white" "apex:outputText" value="{!relatedTo.ID">`

Schedule Approver Reminder Emails

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Use a workflow rule to send a reminder email to approvers who haven't responded to an approval request in a set amount of time.

1. Create an email template for your Advanced Approval reminders.
2. From Setup, enter *`Workflow & Approvals`*, and then select **Workflow Rules**.
3. Click **New Rule**.
4. Select **Approval** for the Object field, and then click **Next**.
5. Set the evaluation criteria to Evaluate the rule when a record is created.
6. Set the rule criteria to *`Approval:Status EQUALS Assigned,Requested`*, and then click **Save & Next**.
7. From the Time Dependent Workflow Actions field, select **New Time Trigger**.
8. Choose the amount of time to wait before Salesforce sends the reminder. For example, choose two days after the rule trigger date. Then save your changes.
9. From the Time Trigger menu, enter *`New Workflow Action`*, and then select **New Email Alert**.
10. Name the email alert and enter a description, and then select the email template you made in Step 1.
11. From the Recipient Type menu, select **Related User: Assigned To**, and then save your changes.

Smart Approvals

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

When sales reps resubmit a recalled or rejected record for approval, it can require approval from only the approvers or approval groups that initially rejected it.

While smart approvals are active, a rejected approval stores the original value of an approval condition's tested field in the Approval Snapshot object. Approval snapshots appear as a related list on the approval record.

When the sales rep resubmits the quote, Advanced Approvals uses the condition's operator to compare the snapshot value with the resubmitted value. If the comparison still evaluates to true, the approval rule sends the approval to only the approvers who rejected it during the last submission.

For example, your company has an approval rule with a condition that fires if the quote's net total is greater than $25,000.

1. A sales rep submits a quote with a net total of $50,000 for approval. Your company's finance team and VP of Sales approve the quote, but the CEO rejects it for being too low.
2. The sales rep revises the quote so it has a net total of $60,000 and resubmits it for approval. Advanced Approvals creates an approval snapshot on your approval record. The approval snapshot has an Approved Value (Numeric) field with a value of $50,000.
3. Advanced Approvals compares the snapshot value to the resubmitted net total.
4. Because the resubmitted value still meets the approval condition, Advanced Approvals sends the request to only the CEO. If the value didn't meet the condition, Advanced Approvals would have rejected the approval and sent it back to the sales rep for adjustment.

To activate smart approvals on a condition, select its Enable Smart Approvals field.

Mixed Regular and Smart Approval Conditions

When a rule contains a mix of smart and standard conditions, the first round of approvals uses standard conditions for all conditions. After resubmission, Advanced Approvals uses the condition types as they were originally defined.

Let's see how Advanced Approvals processes a few conditions relative to the rule's condition type. In this case, your rule's first condition is standard, while the second and third conditions are smart.

Condition Type = Any

- Initial Submission: Regular 1 OR Regular 2 OR Regular 3
- Resubmission after approval: Regular 1 OR Smart 2 OR Smart 3

Condition Type = All

- Initial Submission: Regular 1 AND Regular 2 AND Regular 3
- Resubmission after approval: Regular 1 AND Smart 2 AND Smart 3

Condition Type = Advanced

- Initial Submission: (Regular 1 AND Regular 2) OR Regular 3
- Resubmission after approval: (Regular 1 AND Smart 2) OR Smart 3

Reevaluate Smart Approvals Individually
Set up your smart approval conditions so that any changes to their tested value require reapproval. This feature protects against accidental reapproval of unauthorized or accidental changes to a rule's smart approval conditions.

Reevaluate Smart Approvals Individually

Set up your smart approval conditions so that any changes to their tested value require reapproval. This feature protects against accidental reapproval of unauthorized or accidental changes to a rule's smart approval conditions.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. Navigate to your approval rule.
2. Select Reevaluate Smart Approvals Individually.

Example: Let's say you have an approval rule with the following criteria, where both conditions are smart conditions.

Target Object
Quote

Conditions Met
All

Reevaluate Smart Approvals Individually
True

Condition 1
Requires that the quote's Group field has a value of Engineering

Condition 2
Requires that the quote's Net Total field is greater than $100.

Your sales rep submits a quote with a net total of $101 and a group set to Engineering, which their manager approves. The sales rep then recalls the approval, changes the net total to

$1,000, and resubmits the approval. Because the rule reevaluates smart approvals, the manager receives a request email for the approval resubmission.

Managing Advanced Approval Permissions

Admins and sales reps require different types of permissions based on the actions they want to perform in Advanced Approvals.

EDITIONS

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

Assign Advanced Approval Permission Sets
You can assign users either admin-level or user-level permissions.

CPQ Permission Requirements for Advanced Approvals
CPQ admins and sales reps require different types of permissions based on actions they can take within the Advanced Approvals package.

Assign Advanced Approval Permission Sets

You can assign users either admin-level or user-level permissions.

EDITIONS

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

1. From setup, enter `Manage Users`, and then select **Permission Sets**.
2. Choose a permission set.
   - **Advanced Approvals Admin**—Grants administrator user permissions across all Advanced Approvals objects.
   - **Advanced Approvals User**—Grants standard user permissions across all Advanced Approvals objects.
3. To assign permissions to users, click **Manage Assignments**.
4. Click **Add Assignments**.
5. Select the users that you want to add to the permission set, and then click **Assign**.

CPQ Permission Requirements for Advanced Approvals

CPQ admins and sales reps require different types of permissions based on actions they can take within the Advanced Approvals package.

EDITIONS

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

User Type/Condition	Read	Create	Edit	Delete
Create Quotes (Sales Reps)	• Quote • Quote Document • Quote Lines • Quote Templates • Template Sections	• Quote • Quote Document • Quote Lines	• Quote • Quote Document • Quote Lines	• Quote • Quote Document • Quote Lines

User Type/Condition	Read	Create	Edit	Delete
	• Template Content			
Quote Templates (Admin)	• Quote Templates • Template Content • Template Sections	none	none	none
Sales Reps	• Read permissions on all Salesforce CPQ objects	none	none	none
Product bundles where sales reps select component offerings after adding a bundle to a quote	• Products	• Products	• Products	• Products
Product bundles (Admin)	• Products • Product Options • Product Features • Option Constraints	• Products • Product Options • Product Features • Option Constraints	• Products • Product Options • Product Features • Option Constraints	• Products • Product Options • Product Features • Option Constraints
Sales Reps with the ability to group line items	• Quote Line Groups	• Quote Line Groups	• Quote Line Groups	• Quote Line Groups
Block prices (Admin)	• Block Prices	• Block Prices	• Block Prices	• Block Prices
Block prices (Sales Reps)	• Block Prices	none	none	none
Cost & markup pricing on products (Admin)	• Costs	• Costs	• Costs	• Costs
Cost & markup pricing on products (Sales Reps)	• Costs	none	none	none
Discount Schedules (Admin)	• Discount Schedules • Tiers	• Discount Schedules • Tiers	• Discount Schedules • Tiers	• Discount Schedules • Tiers
Discount Schedules (Sales Reps)	• Discount Schedules • Tiers	none	none	none
Contracted Prices (Admin)	• Contracted Prices	• Contracted Prices	• Contracted Prices	• Contracted Prices
Contracted Prices (Sales Rep)	• Contracted Prices	none	none	none

User Type/Condition	Read	Create	Edit	Delete
Price Rules (Admin)	• Price Actions • Price Conditions • Price Rules	• Price Actions • Price Conditions • Price Rules	• Price Actions • Price Conditions • Price Rules	• Price Actions • Price Conditions • Price Rules
Price Rules (Sales Rep)	• Price Actions • Price Conditions • Price Rules	none	none	none
Guided Selling (Admin)	• Process Inputs • Quote Processes	• Process Inputs • Quote Processes	• Process Inputs • Quote Processes	• Process Inputs • Quote Processes
Guided Selling (Sales Rep)	• Process Inputs • Quote Processes	none	none	none
Product Rules (Admin)	• Product Actions • Product Rules	• Product Actions • Product Rules	• Product Actions • Product Rules	• Product Actions • Product Rules
Product Rules (Sales Rep)	• Product Actions • Product Rules	none	none	none
Dynamic Quote Terms (Admin)	• Quote Terms	• Quote Terms • Term Conditions	• Quote Terms • Term Conditions	• Quote Terms • Term Conditions
Dynamic Quote Terms (Sales Rep)	• Quote Terms	none	none	none
Dynamic Proposals to include PDF docs in Quotes (Admin)	• Additional Documents	• Additional Documents	• Additional Documents	• Additional Documents
Dynamic Proposals to include PDF docs in Quotes (Sales Rep)	• Additional Documents	none	none	none
SolutionGroups (Admin)	• SolutionGroups	• SolutionGroups	• SolutionGroups	• SolutionGroups
Solution Groups (Sales Rep)	• SolutionGroups	none	none	none
Renewals on Opportunities & Quotes (Sales Rep)	• Subscribed Assets • Subscriptions • Assets • Contracts	none	none	none

Advanced Approvals Package Settings

Advanced Approvals package settings define Advanced Approvals features and standards across your Salesforce org.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Approval Email Comments End Indicator

Choose an endpoint for the comments section of an approval email. If you choose Blank Line, we recommend that users with a default email signature include the blank line at the beginning of the signature. That way, Salesforce CPQ captures only intended comments within the comments field.

Approval Keywords

A list of keywords that approvers can use to approve a request. For example, an approver can respond to an approval request email with "Approved." Separate entries with a comma. This field is required.

Consolidate Approval Emails

Consolidate emails when a single approver has to approve or reject the same opportunity or quote more than once.

Inbound Approval Email (Long)

The email address for the email service used to process inbound approval emails.

Reject Keywords

A list of keywords that approvers can use to reject an approval request. For example, an approver can respond to an approval request email with "Rejected." Separate entries with a comma. This field is required.

Manage Your CPQ Orders

When your customer is ready to order their CPQ quote, create an order record to track the products they've purchased. Orders contain order products for each of your quote lines. You can contract the order record to track its subscription products. You can also create invoices from your order.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Guidelines for Setting Up CPQ Orders

When setting up orders, review guidelines related to setup and pricing.

Create 1 Order Per Quote

Create an order that contains every quote line from your quote.

Create Multiple Orders from a Quote

Break your quote into several orders. This feature is useful if you have a large quote that you want to split into multiple small orders for ease of organization and management. For example, you could split products into several orders based on the shipping locations or delivery dates of your quote lines.

Manage Dates for Your Orders and Order Products

Change the start dates and end dates on your order products during or after order creation.

Edit Order Product Quantities

Change the quantity of order products on your order.

Generate Accurate Revenue Reports with Bookings

We added fields to orders and order products so that your company can report on bookings that exclude evergreen subscriptions on order products. Specify which order products are included or excluded from bookings and see the order product's calculated bookings amount and total price.

Set Up Tax Exemption on Your Account

Create a tax exemption certificate in Salesforce CPQ and associate it with your account. When your account has an active tax exemption certificate, Salesforce CPQ changes the account's Tax-Exempt field from No to Yes. ISV tax providers can use this field as a flag to determine whether they want to apply tax to the account's transactions.

Order Fields for CPQ and Billing

The CPQ Order object contains fields for both the CPQ and Billing packages. With certain page layout and field-level security settings, some fields aren't visible or editable.

Order Product Fields for CPQ and Billing

The CPQ Order Product object contains fields for both the CPQ and Billing packages. With certain page layout and field-level security settings, some fields aren't visible or editable.

Guidelines for Setting Up CPQ Orders

EDITIONS

Available in: Salesforce CPQ Summer '16 and later.

When setting up orders, review guidelines related to setup and pricing.

Orders must be created from a primary quote. In Salesforce CPQ, after an order is created from the primary quote, the primary quote can't be edited. When you order a CPQ quote, your order products inherit the following fields from their originating quote lines.

- List Price
- Unit Price
- Total Price

When you contract an order, the order product records look up to any related subscription, contract, and asset fields.

The Order Amount field is equal to the sum of all order product Total Price values on the order.

When you order a Percent of Total product, its order product price is calculated based on the state of the quote at the time the first order was generated. Salesforce CPQ creates the Subscribed Quote Line object when the order is first created. It uses this record for all subsequent orders, even if the original quote changes.

Orders have a Status field set by default to Draft. You can edit fields on your order and order products while the order is a draft. Click **Activate** to set your order's status to Activated and lock the record from field edits. You can invoice or contract your order only while it's activated. Click **Deactivate** to return your order to draft status and make further field edits.

Salesforce CPQ selects an order product's Activated field based on the order's status field. You can select or deselect the **Activated** field yourself. Activating your order products in portions is useful if you want to partially fulfill a quote while maintaining one contract for generating amendments and renewals. You cannot deactivate an order if any of your order products are contracted.

When you order a quote or edit order pricing, Salesforce CPQ runs a series of calculations to determine price schedules. Price schedules are created for only usage-based order products. The order field Price Calculation Status shows Salesforce CPQ's progress through the calculation process. Users can't activate the order, edit order fields, or edit order product fields until the price calculation status has a value of Completed. Salesforce CPQ updates the price calculation status message to reflect its progress through the price calculation process.

Warning: We recommend leaving Price Calculation Status as a read-only field. Making the field editable can cause errors during the price calculation process.

Creating Multiple Orders for a Quote

When you order your quote, you can create one order that contains order products for all your quote lines, or split your order products among several orders. This feature allows users with large quotes to break them up into several orders for greater ease of management. For example, you can divide your orders by product type or shipping location.

Select **Allow Multiple Orders** in the Orders package settings to enable the creation of multiple orders from a quote. This setting is available only to Salesforce CPQ+ users.

Setting Up Orders

Make sure that Salesforce CPQ has enabled orders in your org. From Setup, in the Quick Find box, enter `Order Settings`, and then select **Order Settings**. Select **Enable Orders**. If you allow product swaps or decreases in quantity on amendments, select **Enable Negative Quantity**.

By default, Salesforce CPQ uses the order's creation date for its Order Start Date field. However, you can adjust the default start for your orders. From Setup, in the Quick Find box, enter `Installed Packages`, select **Installed Packages**, and then select **Configure** for Salesforce CPQ. In the Orders tab, choose a value for Default Order Start Date.

Enable field-level permissions for fields on the following objects.

- Order: Contracted, Payment Term, Quote
- Order Product: Quote Line, Required By

Enable CPQ Admin User and CPQ User permissions for the order product field Full-Term Net Unit Price.

To create orders from approved quotes only, select **Require Approved Quote** in Orders package settings.

Create 1 Order Per Quote

Create an order that contains every quote line from your quote.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

User Permissions Needed	
To create orders:	Field-level permissions for the order fields Contracted, Payment Term, and Quote AND Field-level permissions for the order product fields Quote Line and Required By AND CPQ Admin User and CPQ User permissions for the Order Product field Full-Term Net Unit Price

If you make one order for your entire quote, you can't change order product quantities unless you contract your quote and amend it.

1. Make sure that Allow Multiple Orders is not selected.
2. Click **Create Order** on your opportunity or quote. You can also select **Ordered** on your opportunity or quote and then click **Save**.
3. Complete the detail fields, and then save your changes.
   Salesforce CPQ creates an order with order products that cover the entire quantity of all quote lines on your account.

Create Multiple Orders from a Quote

Break your quote into several orders. This feature is useful if you have a large quote that you want to split into multiple small orders for ease of organization and management. For example, you could split products into several orders based on the shipping locations or delivery dates of your quote lines.

EDITIONS

Available in: Salesforce CPQ+ Summer '16 and later

User Permissions Needed

To create orders:	Field-level permissions for the order fields Contracted, Payment Term, and Quote AND Field-level permissions for the order product fields Quote Line and Required By AND CPQ Admin User and CPQ User permissions for the Order Product field Unprorated Net Price

1. Make sure the CPQ Orders package setting **Allow Multiple Orders** is selected.
2. Click **Create Order** on your opportunity or quote.
3. Complete the detail fields, and then save your changes.
   The Select Products page displays the quantity per quote line that you have available to order.
4. Select the checkbox to include a quote line on your order.

   The Quoted Quantity field is equal to the total quantity of the quote line. You can order some, all, or none of a quote line. If you're ordering a partial quantity, enter that value in the Quantity field.

   Salesforce CPQ creates the order record and updates your quote lines with the new Ordered Quantity values.

You can also click **Ordered** on your opportunity or quote and then save your changes. This process creates an order with all remaining unordered quote lines from your quote.

Manage Dates for Your Orders and Order Products

Change the start dates and end dates on your order products during or after order creation.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Set Up Order and Order Product Dates

The Order package-level setting Default Order Start Date defines the default start date for your order on the New Order page. You can choose from the current day or your order's start date. You can change this date on the New Order page.

Salesforce CPQ sets an order product's start date relative to the order's start date. It then accounts for any offsets between your quote's start date and the quote line's start date. The length of time between your order product's start and end dates matches the length of time between your quote line's start and end dates. This process ensures that your order products always have the same date structure as your quote lines, even if the order starts after your quote. For example, let's say you have a quote that starts on 04/01/18. Your quote has the following quote lines.

Quote Line 1

Start Date: 04/01/18

End Date: 03/31/19

Quote Line 2

Start Date: 05/01/18

End Date: 12/31/18

Quote Line 3

Start Date: 06/01/18

End Date: 09/30/18

You order your quote and set its start date to 06/01/18. Your order products have the following dates.

Order Product 1

Start Date: 06/01/18

End Date: 05/31/19

Order Product 2

Start Date: 07/01/18

End Date: 02/28/18

Order Product 3

Start Date: 08/01/18

End Date: 11/30/18

The order's end date defaults to the latest end date of all its order products — in this case, 05/31/19.

Change Order and Order Product Dates

You can move the order start date forward or backward after order creation. When you change it, Salesforce CPQ adjusts order product dates according to the logic above. So if you change your order's start date from 06/01/18 to 08/01/18, your order product dates change as follows.

Order Product 1

Start Date: 08/01/18

End Date: 07/31/19

Order Product 2

Start Date: 09/01/18

End Date: 04/30/18

Order Product 3

Start Date: 10/01/18

End Date: 01/31/18

Ordering MDQ Products

When Salesforce CPQ creates an order product for an MDQ line, it evaluates whether you ordered a previous segment in an earlier order. If you did, the order product sets its start date to the latest date between the start date of your new order and the end date of the previous segment.

Edit Order Product Quantities

EDITIONS

Available in: Salesforce CPQ+ Summer '16 and later

Change the quantity of order products on your order.

You can edit order products only on unactivated orders that you create while Allow Multiple Orders is enabled.

The Edit Products page displays all the products from your original quote. The products currently on your order have a selected checkbox.

- Quoted Quantity: The total number of units on the quote line that created this order product.
- Ordered Quantity: The number of units you've ordered across all the orders you made from your quote.
- Available Quantity: The number of remaining units available to add to the order. This number changes based on edits you make to the Quantity field.
- Quantity: Enter the updated number of units that you would like on this order. You can deselect the checkbox to remove the entirety of this order product line from your order. You can also select an unselected checkbox to add the entire available quantity of order products to this order.

1. In your order, click **Edit Order Products**. Salesforce CPQ shows the Edit Products page.
2. Increase or decrease the quantity of your order products as needed.

   You can deselect an order product line to remove the entire quantity of that line from your order.

   Salesforce CPQ adjusts the available quantity on the related quote line.
3. Save your changes.

Generate Accurate Revenue Reports with Bookings

We added fields to orders and order products so that your company can report on bookings that exclude evergreen subscriptions on order products. Specify which order products are included or excluded from bookings and see the order product's calculated bookings amount and total price.

The process to add the fields to your page layout is the same for order and order products. For example, to add the Order Bookings field, find the page layout for Orders.

- If you're using Lightning Experience, from Setup, in the Quick Find box, enter `Object Manager`, and then select **Object Manager**. Next, click **Order**, and then scroll to the **Page Layouts** section.
- If you're using Salesforce Classic, from Setup, in the Quick Find box, enter `Orders`, and then select **Page Layouts**.

1. Next to CPQ Order Layout, click **Edit**.
2. From the top panel, enter `Order Bookings` into the Quick Find box.
3. Drag the field to an empty section, then save your changes.

Once enabled, all your revenue specialists have to do is set the Bookings Indicator field according to your reporting requirements.

Evergreen order products are not included in the bookings amount.

Set Up Tax Exemption on Your Account

EDITIONS

Available in: Salesforce CPQ Winter '18 and later

Create a tax exemption certificate in Salesforce CPQ and associate it with your account. When your account has an active tax exemption certificate, Salesforce CPQ changes the account's Tax-Exempt field from No to Yes. ISV tax providers can use this field as a flag to determine whether they want to apply tax to the account's transactions.

You may need to add the Tax Exemption Certificates related list to the account page layout.

- Salesforce Billing doesn't currently use the tax exempt field. We'll let you know when it does.
- ISV tax providers determine whether to evaluate Salesforce CPQ's tax exemption certificates when applying tax. Contact your tax provider of choice to confirm how they work with this feature.

1. Go to your account's Tax Exemption Certificates related list and click **New Tax Exemption Certificate**.
2. Provide a name, tax certificate details, and company information for your certificate.
3. Select the Active field.
4. Select the Default field.
   You can only select the Default field if the certificate is active, and you can only have one default certificate at a time on your account.
5. Click **Save**.
   Salesforce CPQ creates the tax exemption certificate for your account. If the certificate is active and default, Salesforce CPQ also changes your account's Tax-Exempt field from No to Yes.

- You can create multiple tax exemption certificates on a single account.
- Your account's Tax-Exempt field has a value of Yes as long the account contains at least one tax certificate that is default and active. When this is no longer the case, Salesforce CPQ changes tax-exempt to No.

Order Fields for CPQ and Billing

EDITIONS

CPQ fields available in Salesforce CPQ Summer '16 and later.

Salesforce Billing fields available in Salesforce Billing Winter '18 and later.

The CPQ Order object contains fields for both the CPQ and Billing packages. With certain page layout and field-level security settings, some fields aren't visible or editable.

Note: "SBQQ__" fields come with the Salesforce CPQ package, and "blng__" fields come with the Salesforce Billing package.

Field	API Name	Data Type	Definition
Billed Amount (without tax)	blng__BilledAmountwithouttax__c	Roll-Up Summary (SUM Order Product)	The sum of all the order products that you've billed from this order before applying tax. (Read only)
Billed Tax	blng__BilledTax__c	Roll-Up Summary (SUM Order Product)	The sum of tax on all the order products that you've billed from this order. (Read only)
Billing Account	blng__BillingAccount__c	Lookup(Account)	The name of the billing account that the order is linked to. You can enter the account name or select the account using the lookup icon.
Billing Day Of Month	blng__BillingDayOfMonth__c	Picklist	The date that Salesforce Billing

Field	API Name	Data Type	Definition
			evaluates this order for billing.
Billing Frequency	`SBQQ__BillingFrequency__c`	Picklist	The schedule that Salesforce CPQ uses to bill this order product. You can pick monthly, quarterly, semiannual, or annual.
Bill Now	`blng__BillNow__c`	Checkbox	Create an invoice for this order. Salesforce Billing creates invoices based on the billing and tax rules assigned to this order's order products.
Contracted	`SBQQ__Contracted__c`	Checkbox	If you're using contract-based renewals, selecting this field creates a contract, subscriptions, and assets from your order. If you're using asset-based, renewals, selecting this field creates assets from your order.
Contracting Method	`SBQQ__ContractingMethod__c`	Picklist	The contracting method field controls how Salesforce CPQ sets the start dates and end dates of contracts you create from order products. You can group your subscriptions into separate contracts based on their subscription end dates or place all your subscriptions in one contract.
Invoice Batch	`blng__InvoiceBatch__c`	Picklist	Invoice schedulers evaluate orders with matching numbers at the same time.
Order Bookings	`SBQQ__OrderBookings__c`	Roll-Up Summary (SUM Order Product Bookings)	Calculates the total amount of all order product bookings.
Payment Term	`SBQQ__PaymentTerm__c`	Picklist	Define the schedules for how your customers pay for the invoices you send, such as due on receipt, net 15, or net 30.
Price Calculation Status	`SBQQ__PriceCalcStatus__c`	Picklist	When you order a usage product, Salesforce CPQ converts the product's discount schedule into a price schedule, which inherits the discount schedule's prices and tiers. When you

Field	API Name	Data Type	Definition
			upload usage, Salesforce Billing prices the usage based on the rules and prices defined in the price schedule.
Price Calculation Status Message	SBQQ__PriceCalcStatusMessage	Text(255)	Shows the status of price calculation for usage order products on your order. Salesforce CPQ updates this field throughout the calculation process.
Quote	SBQQ__Quote__c	Lookup(Quote)	The quote that you ordered to create this order record.
Renewal Term	SBQQ__RenewalTerm__c	Number(16, 2)	By default, when this field is null, renewal opportunities made from this order match the original contract term. You can provide a value here to set your own renewal term.
Renewal Uplift (%)	SBQQ__RenewalUpliftRate__c	Percent(8, 3)	Define a percentage for price increases on renewal opportunities made from this order.
Invoice Group ID	blng__InvoiceGroupId__c	Text(100)	After Salesforce Billing groups your order products by their invoice group values, it assigns each group a unique ID. (Read only)
Total Amount (With Tax)	SBQQ__TotalAmount__c	Roll-Up Summary (SUM Order Product)	The sum of all the order product total amounts with tax included. (Read only)
Total Billings	blng__TotalBillings__c	Formula (Currency)	The sum of all invoice lines (including tax) created from this order. (Read only)

Order Product Fields for CPQ and Billing

The CPQ Order Product object contains fields for both the CPQ and Billing packages. With certain page layout and field-level security settings, some fields aren't visible or editable.

Note: "SBQQ__" fields come with the Salesforce CPQ package, and "blng__" fields come with the Salesforce Billing package.

EDITIONS

CPQ fields available in Salesforce CPQ Summer '16 and later.

Salesforce Billing fields available in Salesforce Billing Winter '18 and later.

Field	API Name	Data Type	Definition
Activated	SBQQ__Activated__c	Checkbox	Activate this order product. By default, this field inherits the value of the order's Activated field. You can contract and invoice only activated orders and order products. Deactivate to edit order product fields.
Activation Status	SBQQ__ActivationStatus__c	Picklist	The status of this order product. This field is set to Drafted when you create an order product. Change it to Activated by selecting the Activated field on the order product or on the parent order.
Asset	SBQQ__Asset__c	Lookup(Asset)	The asset that Salesforce CPQ created when you contracted this order product.
Billable Unit Price	blng__BillableUnitPrice__c	Currency(16, 2)	When you order a quote, Salesforce CPQ calculates the billable unit price for one-time and recurring order products on the order. The formula for this value is [(Amount / Prorate Multiplier) / Pricing Frequency] * Billing Frequency. (Read only.)
Billing Account	blng__BillingAccount__c	Lookup(Account)	The name of the billing account that the order

Field	API Name	Data Type	Definition
			is linked to. You can enter the account name or select the account using the lookup icon.
Billing Frequency	`SBQQ__BillingFrequency__c`	Picklist	The schedule that Salesforce CPQ uses to bill this order product. You can pick monthly, quarterly, semiannual, or annual.
Billing Type	`SBQQ__BillingType__c`	Picklist	The billing type defines when billing occurs. Billing in advance lets you bill your customers for products or services before you provide them. Billing in arrears lets you bill your customers after the products or services are provided.
Block Price	`SBQQ__BlockPrice__c`	Lookup(Block Price)	The block price that applied to the quote line that created this order product.
Bookings Indicator	`SBQQ__BookingsIndicator__c`	Picklist	Specifies whether the order product's total price is included or excluded from the bookings. Default is set to 'Include.'
Charge Type	`SBQQ__ChargeType__c`	Picklist	This field indicates whether you charge customers for this order product once, as a recurring charge, or based on customer usage. The charge type inherits its value from the quote line that created this order product.
Contract	`SBQQ__Contract__c`	Lookup(Contract)	The contract you created from this order product.
Contracted	`SBQQ__Contracted__c`	Checkbox	If you’re using contract-based renewals, selecting this field creates a contract, subscriptions, and assets from your order. If you’re using asset-based, renewals, selecting this field creates assets from your order.
Contract Method	`SBQQ__ContractingMethod__c`	Picklist	The contracting method field controls how Salesforce CPQ sets the start dates and end dates of contracts you create from order products. If this field has a value

Field	API Name	Data Type	Definition
			of Inherit, the order product inherits the order's contracting method. You can also choose not to contract this order product or to contract it separately when you contract the parent order.
Default Subscription Term	SBQQ__DefaultSubscriptionTerm__c	Number(5, 0)	Term length of the subscription, which only applies if the product is a subscription. It is copied from the Subscription Term of the related product when the line item is first generated.
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup(Discount Schedule)	The discount schedule that applied to the quote line that created this order product.
Hold Billing	blng__HoldBilling__c	Picklist	When this field is set to Yes on an active order product, invoice schedulers keep the order product active but do not evaluate it for billing.
Invoice Group	blng__InvoiceGrouping__c	Picklist	Use invoice groups to split an account's charges into multiple invoices based on user-defined values. When an invoice scheduler picks up its order products during an invoice run, it looks at each order product's invoice group value. It then groups those order products into invoices by their respective value. You can set any number of invoice group values on 1 order product.
Invoice Group ID	blng__InvoiceGroupId__c	Text(100)	After Salesforce Billing groups your order products by their invoice group values, it assigns each group a unique ID. (Read only)
Invoice Run	blng__InvoiceRun__c	Lookup(Invoice Run)	The invoice run that is evaluating this order product for billing.

Field	API Name	Data Type	Definition
Invoice Run Start Date	`blng__InvoiceRunStartDate__c`	Date/Time	The start date and time of the invoice run that is evaluating this order product.
Invoice Run Status	`SBQQ__InvoiceRunProcessingStatus__c`	Currency(12, 2)	The stage of the invoice run that is evaluating this order product for billing.
Last Charge To Date	`blng__LastChargeToDate__c`	Date	The date an order product was billed through. This date is equal to the end date of the last invoice line for this order product. Salesforce Billing sets this field automatically and users can't change it. It's used in the calculation of invoice charge amounts.
Last Invoice Target Date	`blng__LastInvoiceTargetDate__c`	Date	The target date of the most recent invoice run that generated an invoice line for this order product. Salesforce Billing sets this field automatically and users can't change it. It's used mostly for auditing purposes.
Legal Entity	`blng__LegalEntity__c`	Lookup(Legal Entity)	The legal entity that covers this order product. When you bill this order product, Salesforce CPQ uses the legal entity to apply billing rules, tax rules, revenue recognitions rules, and their related treatments.
Next Billing Date	`blng__NextBillingDate__c`	Date	The next date that Salesforce Billing evaluates and prices this product for billing. This is a system field that users and admins shouldn't change.
Next Charge Date	`blng__NextChargeDate__c`	Date	The next date that Salesforce Billing will charge this order product. Salesforce Billing sets this field based on this order product’s billing frequency, billing type, and date of invoice. Users can’t change it.
Order Product Bookings	`SBQQ__OrderProductBookings__c`	Formula	If the Bookings Indicator is set to 'Include,' this field shows the

Field	API Name	Data Type	Definition
			amount of the order product's total price. Otherwise, it's set to 0.
Ordered Quantity	SBQQ__OrderedQuantity__c	Number(16, 2)	The quantity of products that you ordered from a quote. If your Salesforce org allows multiple orders per quote, you can order a partial quantity of the quote line's total quantity.
Product Subscription Type	SBQQ__ProductSubscriptionType__c	Picklist	Order product's default subscription type. By default, this field value is mapped from the quote line. The admin should set up the proper page layout. For any legacy quote lines, this value will be null.
Quoted List Price	SBQQ__QuotedListPrice__c	Number(12, 2)	List unit price for the product quoted by this line item. The list price originates from the price book.
Quoted Quantity	SBQQ__QuotedQuantity__c	Number(10, 2)	The total quantity of the quote line used to create this order product. (Read only)
Quote Line	SBQQ__QuoteLine__c	Lookup(Quote Line)	The quote line where this order product originated. (Read only)
Required By	SBQQ__RequiredBy__c	Lookup(Order Product)	If this order product is part of a bundle, this field looks up to its parent product.
Revenue Recognition Rule	blng__RevenueRecognitionRule__c	Lookup(Revenue Recognition Rule)	The revenue recognition rule that defines whether Salesforce Billing creates a revenue schedule for and applies revenue recognition treatments to this order product.
Revenue Schedule Status	blng__RevenueScheduleStatus__c	Picklist	Salesforce Billing's status in recognizing the revenue for this order product.
Revised Order Product	blng__RevisedOrderProduct__c	Lookup(Order Product)	The order product that this order product has revised.

Field	API Name	Data Type	Definition
Segment Index	`SBQQ__SegmentIndex__c`	Number(2, 0)	The position of this MDQ order product's segment in the overall segment table.
Segment Key	`SBQQ__SegmentKey__c`	Text(30)	For MDQ products, this shared key groups quote line segments together on the order.
Segment Type	`SBQQ__DimensionType__c`	Text(8)	The type of price dimension for an MDQ order product, such as year, month, or quarter.
Subscription Pricing	`SBQQ__SubscriptionPricing__c`	Picklist	Indicates how Salesforce CPQ calculates subscription pricing for an order product. If this field is blank, the order product is not a subscription product.
Subscription Term	`SBQQ__SubscriptionTerm__c`	Number(18, 0)	The length of the term for a subscription order product.
Subscription Type	`SBQQ__SubscriptionType__c`	Picklist	Determines the contract's pricing and process. The value is mapped from the quote line. Used for reporting purposes. Admin should set up the page layout.
Tax Calculation Status	`blng__TaxStatus__c`	Picklist	Salesforce Billing's status in calculating tax for this order product.
Tax City (Override)	`blng__TaxCity__c`	Text(255)	The city of the address that Salesforce Billing uses to calculate tax for this order product.
Tax Code	`SBQQ__TaxCode__c`	Text(255)	The tax code that your tax rules use when calculating tax for your order product.
Tax Country (Override)	`blng__TaxCountry__c`	Text(255)	The country of the address that Salesforce Billing uses to calculate tax for this order product.
Tax County (Override)	`blng__TaxCounty__c`	Text(255)	The county of the address that Salesforce Billing uses to calculate tax for this order product.

Field	API Name	Data Type	Definition
Tax Engine	blng__TaxEngine__c	Picklist	The tax engine that you've configured to calculate tax for order products: an external engine or the Salesforce Billing tax engine. Define the tax engine in package-level settings.
Tax Error Message	blng__TaxErrorMessage__c	Text(255)	A message indicating that Salesforce Billing could not calculate tax for this order product.
Tax Percentage Applied	blng__TaxPercentageApplied__c	Percent(16, 2)	The amount of tax that Salesforce CPQ applied to your order product based on your tax engine's tax calculations.
Tax State	blng__TaxState__c	Text(255)	The state of the address that Salesforce Billing uses to calculate tax for this order product.
Tax Street	blng__TaxStreet__c	Text(255)	The street of the address that Salesforce Billing uses to calculate tax for this order product.
Tax Zip Code	blng__TaxZipCode__c	Text(50)	The ZIP code of the address that Salesforce Billing uses to calculate tax for this order product.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	The term discount schedule that applied to the quote line that created this order product.
Total Amount (With Tax)	SBQQ__TotalAmount__c	Currency(16, 2)	Total amount with tax included.
Upgraded Subscription	SBQQ__UpgradedSubscription__c	Lookup(Subscription)	The subscription that this order product's quote line is upgrading.
Terminated Date	SBQQ__TerminatedDate__c	Date	When you contract this order, Salesforce CPQ sets the subscription's terminated date to the date of the contracting.

Manage Your Subscriptions and Assets

Use subscriptions to keep records of subscription products you've quoted or sold. Use assets to keep records of stand-alone products you've quoted or sold. You can use these records later to manage amendments and renewals to your quotes and orders.

EDITIONS

Available in: Salesforce CPQ Winter '16 and later

The Renewal Model field gives you two ways to define how Salesforce CPQ tracks the products you quote and sell on your account.

Set your renewal model in your Subscriptions and Renewals package settings. Salesforce CPQ applies that value by default to the renewal model field on your accounts. You can also set the renewal model on your account to a different value, which overrides the package's renewal model.

When you contract an opportunity or order with at least one subscription product under a contract-based renewal model, Salesforce CPQ creates a contract record. It then creates subscription records for your subscription products and asset records for your products with asset conversion. Your contract contains lookups to subscription record for each subscription product on your quote or order. Use the contract record to track the following information for your subscriptions.

- Quantity
- Start Date
- End Date
- Renewal and amendment settings

Salesforce CPQ creates contracts as background processes by default. You can change the creation process to occur in the foreground by going to your Subscriptions and Renewals package settings and selecting **Contract in Foreground**.

Important: Salesforce CPQ does not generate contracts for quotes that contain only optional products.

Renewal Models	Use Case	Actions	What Salesforce CPQ Does
Contract-based	You sell many subscription products and want to keep detailed records of their start and end dates.	• To contract a quote, click **Contracted** on your opportunity. • To contract an order, click **Contracted** on your order.	• Creates a contract record. • Creates a subscription record for each subscription product on your quote or order and associates these records with your contract. • Creates an asset record for each nonsubscription product with asset conversion and associates these records with your account. • Creates a subscribed asset record for any product covered by a percent of total product. This record looks up to the subscription record for your percent of total product.

Renewal Models	Use Case	Actions	What Salesforce CPQ Does
Asset-based	You don't sell subscription products or you use only percent of total products to represent your subscription products.	• To create assets, click **Contracted** on your quote or order.	• Creates an asset record for each nonsubscription product with asset conversion and associates these records with your account. • Creates a subscription record for any percent of total subscriptions that cover an asset. The covered asset's Current Subscription field looks up to the subscription record.

Creating a Contract from an Opportunity
Create a contract from an opportunity to manage subscription products that you've quoted for your customers.

Creating a Contract from an Order
Create a contract from an order to manage subscription products that your customers have purchased.

Track Contracting Job Status
You can track the status of background contracting jobs. The spinner provides visibility by showing your contracting job progress.

Asset Guidelines
Assets are records of non-subscription products that you quoted or sold to your customers. You can amend or renew your assets on an amendment quote or renewal quote.

Subscription Guidelines
Subscription records contain information about subscription products on opportunities or orders that you've contracted.

CPQ Contract Fields
Contracts store information on the subscriptions that sales reps have quoted or ordered. They also contain fields that help customize your renewals and amendments.

CPQ Asset Fields
Salesforce CPQ provides various custom managed fields for the asset object.

Service Cloud for Salesforce CPQ
Salesforce CPQ's Service Cloud integration package provides sales contract features to Service Cloud users. When you enable the Service Cloud Integration package, Salesforce CPQ replaces contracts with service contracts and subscriptions with service contract line items.

Creating a Contract from an Opportunity

Create a contract from an opportunity to manage subscription products that you've quoted for your customers.

Salesforce CPQ requires the following objects and settings when you create a contract from an opportunity.

EDITIONS

Available in: **All** Salesforce CPQ Editions

- An opportunity with at least one subscription product
- A primary quote that looks up to your opportunity
- A contract-based renewal method on your opportunity's account

To contract your opportunity, select **Contracted** on your opportunity record, and then save your changes. The contract inherits its start and end dates from your quote's start and end dates. The contract is created in the background.

Salesforce CPQ then creates a subscription record for each of your subscription products. These records contain pricing and date values for each of the subscription products you quoted. You can access your subscription records from your contract's Subscription related list.

- By default, the subscription inherits its start and end dates from the quote line group's start and end dates.
- If the quote line group's dates are null, the subscription inherits its start and end dates from the quote line's start and end dates.
- If the quote line's dates are null, the subscription record inherits its start and end dates from the quote line's Effective Start Date value and Effective End Date value.

Subscriptions inherit the values of all other matching quote line fields.

Salesforce CPQ creates assets for your products that have One per Unit or One per Quote Line asset conversion. These records contain pricing values for the nonsubscription products you quoted. You can access your asset records from your account.

CPQ Opportunity Contracting Methods
You can adjust quote fields to control how Salesforce CPQ distributes subscription products on your contracts.

CPQ Opportunity Contracting Methods

You can adjust quote fields to control how Salesforce CPQ distributes subscription products on your contracts.

EDITIONS

Available in: All Salesforce CPQ Editions

The quote field Contracting Method controls how Salesforce CPQ sets the start dates and end dates of contracts you create from your opportunity.

- By subscription end date: Salesforce CPQ groups subscription products by end dates into separate contracts. The contract's start date is equal to the earliest start date among its subscription products. This value is the default contracting method value.
- Single contract: Salesforce CPQ creates one contract for all your opportunity's subscription products.
- The single contracting method is not available for evergreen quote lines. Evergreen and non-evergreen subscriptions must be managed on different contracts.

Example: You're contracting an opportunity containing a quote for several of your company's software subscriptions. Let's have a look at how Salesforce CPQ creates your contracts and assigns subscriptions to them based on your quote's contracting methods. For example, in Table 1, Contract 1 contains the MDM Subscription and the Data Security Subscription. You can access all these contracts from your opportunity's Contracts related list.

Table 39: Contracting Method: By Subscription End Date

Start Date (Quote Line)	End Date (Quote Line)	End Date (Quote Line)	Resulting Subscription Goes to	Contract Start Date	Contract End Date	Subscription Start Date	Subscription End Date
MDM Subscription	01/01/18	09/30/18	Contract 1	01/01/18	09/30/18	01/01/18	09/30/18

Start Date (Quote Line)	End Date (Quote Line)	End Date (Quote Line)	Resulting Subscription Goes to	Contract Start Date	Contract End Date	Subscription Start Date	Subscription End Date
Data Security Subscription	03/01/18	09/30/18	Contract 1	01/01/18	09/30/18	03/01/18	09/30/18
Service Desk Subscription	03/01/18	10/12/18	Contract 2	03/01/18	10/12/18	03/01/18	10/12/18
Data Backup Subscription	05/01/18	11/15/18	Contract 3	05/01/18	11/15/18	05/01/18	11/15/18
Data Backup Subscription	06/01/18	11/15/18	Contract 3	05/01/18	11/15/18	05/01/18	11/15/18
Infrastructure Management Subscription	06/01/18	11/15/18	Contract 3	05/01/18	11/15/18	06/01/18	11/15/18
Release & Deployment Subscription	06/01/18	11/30/18	Contract 4	06/01/18	11/30/18	06/01/18	11/30/18

Table 40: Contracting Method (Quote): Single Contract

Subscription Quote Line	End Date (Quote Line)	End Date (Quote Line)	Resulting Subscription Goes To	Contract Start Date	Contract End Date	Subscription Start Date	Subscription End Date
MDM Subscription	01/01/18	09/30/18	Contract 1	01/01/18	11/15/18	01/01/18	09/30/18
Data Security Subscription	03/01/18	09/30/18	Contract 1	01/01/18	11/15/18	03/01/18	09/30/18
Service Desk Subscription	03/01/18	10/12/18	Contract 1	01/01/18	11/15/18	03/01/18	10/12/18
Data Backup Subscription	05/01/18	11/15/18	Contract 1	01/01/18	11/15/18	05/01/18	11/15/18
Data Backup Subscription	06/01/18	11/15/18	Contract 1	01/01/18	11/15/18	06/01/18	11/15/18
Infrastructure Management Subscription	06/01/18	11/15/18	Contract 1	01/01/18	11/15/18	06/01/18	11/15/18
Release & Deployment Subscription	06/30/18	11/15/18	Contract 1	01/01/18	11/15/18	06/30/18	11/15/18

Creating a Contract from an Order

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Create a contract from an order to manage subscription products that your customers have purchased.

Salesforce CPQ requires the following objects and settings when you create a contract record from an order.

- An order with at least one subscription order product
- All the subscription order products you want to contract are activated
- A contract-based renewal method on your order's account
- An uncontracted opportunity for the quote you ordered from
- Order products must be related to the quote line of the quote the order was generated from

To contract your order, select **Contracted** on your order record, and then save your changes. By default, Salesforce CPQ creates a contract for each group of subscription order products with matching end dates. The contract is created in the background.

Salesforce CPQ sets the dates on each contract record based on the following settings.

- The contract start date inherits the order's Order Start Date field value.
- The contract end date inherits the shared end date of the order products on that contract.

Salesforce CPQ then creates a subscription record for each of your subscription order products. These records contain pricing and date values for each of the subscription products you quoted. You can access your subscription records from your contract's Subscription related list. Subscription records made from contracted order products set their start and end dates based on the order product's start and end dates. Finally, the subscription field on each of your order products receives a lookup to the related subscription record.

Salesforce CPQ also creates subscribed assets for any of the percent of total subscription products that you contracted.

Through the order record, you can create a contract for percent of total, covered, or bundle order products.

You can also contract a single order product on your order, even when the order record is unactivated. Go to your order product, activate it, select its **Contracted** checkbox, and then save your changes. Salesforce CPQ creates a contract and subscription record as if you had contracted an order with a single order product.

Tip: You can activate and contract an order product even if its parent order is unactivated. This feature is useful if you want to contract a few subscriptions on a large order and then contract the rest of the order from the order record.

Salesforce CPQ creates assets for your order products with related products that have One per Unit or One per Quote Line asset conversion. These records contain pricing values for the nonsubscription products you quoted. You can access your asset records from your account.

Note: As of Salesforce CPQ 210.13, the order contracting process respects the value of the Subscriptions and Renewals package setting Contract in Foreground.

Order Contracting Methods

You can adjust the contracting method fields on your order and order products to control how Salesforce CPQ distributes subscription products on your contracts.

Order Contracting Methods

You can adjust the contracting method fields on your order and order products to control how Salesforce CPQ distributes subscription products on your contracts.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Order Contracting Method

The order field Contracting Method controls how Salesforce CPQ sets the start dates and end dates of contracts you create from your order. The field inherits its value from the quote that created your order.

- By subscription end date: Salesforce CPQ groups subscription products by end dates into separate contracts. The contract's start date is equal to the earliest start date among its subscription products. This value is the default contracting method value.
- Single contract: Salesforce CPQ creates one contract for all this order's subscription products.
- The single contracting method is not available for evergreen quote lines. Evergreen and non-evergreen subscriptions must be managed on different contracts.

Order Product Contracting Method

Order products also have a Contracting Method field.

- Inherit: This order product follows the contracting method specified on its order. All order products have this value by default.
- Contract Separately: This order product receives its own independent contract when you contract its order.
- Do Not Contract: Salesforce CPQ doesn't contract this order product when you contract its order.

Example: You're contracting an order for several of your company's software subscriptions products. Let's have a look at how Salesforce CPQ creates your contracts based on the contracting methods of your order and order products.

Table 41: Contracting Method (Order): By Subscription End Date

Subscription Order Product	Start Date (Order Product)	End Date (Order Product)	Contracting Method (Order Product)	Resulting Subscription Goes To	Contract Start Date	Contract End Date	Subscription Start Date	Subscription End Date
MDM Subscription	01/01/18	09/30/18	Inherit	Contract 1	01/01/18	09/30/18	01/01/18	09/30/18
Data Security Subscription	03/01/18	09/30/18	Inherit	Contract 1	01/01/18	09/30/18	03/01/18	09/30/18
Service Desk Subscription	03/01/18	10/12/18	Inherit	Contract 2	03/01/18	10/12/18	03/01/18	10/12/18
Data Backup Subscription	05/01/18	11/15/18	Inherit	Contract 3	05/01/18	11/15/18	05/01/18	11/15/18
Data Backup Subscription	06/01/18	11/15/18	Inherit	Contract 3	05/01/18	11/15/18	06/01/18	11/15/18
Infrastructure Management Subscription	06/01/18	11/15/18	Contract Separately	Contract 4	06/01/18	11/15/18	06/01/18	11/15/18

Subscription Order Product	Start Date (Order Product)	End Date (Order Product)	Contracting Method (Order Product)	Resulting Subscription Goes To	Contract Start Date	Contract End Date	Subscription Start Date	Subscription End Date
Release & Deployment Subscription	06/01/18	11/15/18	Do Not Contract	None	None	None	None	None

Table 42: Contracting Method (Order): Single Contract

Subscription Order Product	Start Date (Order Product)	End Date (Order Product)	Contracting Method (Order Product)	Resulting Subscription Goes To	Contract Start Date	Contract End Date	Subscription Start Date	Subscription End Date
MDM Subscription	01/01/18	09/30/18	Inherit	Contract 1	01/01/18	11/15/18	01/01/18	09/30/18
Data Security Subscription	03/01/18	09/30/18	Inherit	Contract 1	01/01/18	11/15/18	03/01/18	09/30/18
Service Desk Subscription	03/01/18	10/12/18	Inherit	Contract 1	01/01/18	11/15/18	03/01/18	10/12/18
Data Backup Subscription	05/01/18	11/15/18	Inherit	Contract 1	01/01/18	11/15/18	05/01/18	11/15/18
Data Backup Subscription	06/01/18	11/15/18	Inherit	Contract 1	01/01/18	11/15/18	06/01/18	11/15/18
Infrastructure Management Subscription	06/01/18	11/15/18	Contract Separately	Contract 2	06/01/18	11/15/18	06/01/18	11/15/18
Release & Deployment Subscription	06/01/18	11/15/18	Do Not Contract	None	None	None	None	None

Track Contracting Job Status

You can track the status of background contracting jobs. The spinner provides visibility by showing your contracting job progress.

The spinner appears only when the contracting job is completed in the background.

Add this component to your existing order page layouts. First, find the page layouts for Orders.

- If you're using Lightning Experience, from Setup, in the Quick Find box, enter `Object Manager`, and then select **Object Manager**. Next, click **Order**, and then scroll to the **Page Layouts** section.
- If you're using Salesforce Classic, from Setup, in the Quick Find box, enter `Orders`, and then select **Page Layouts**.

1. Next to CPQ Order Layout, click **Edit**.
2. From the top panel, navigate to Visualforce Pages.
3. Drag the **Section** label to an empty section.
4. Name the new section `OrderContracting`.
5. Deselect **Detail Page** and **Edit Page**. In layout, choose **1-Column**. Save your changes.
6. From the Visualforce Pages menu, drag the OrderContracting label to the new section.
7. Click the wrench icon on the OrderContracting section.
8. To make sure that the page layout appears correctly, set **Width** to `100%` and **Height** to `22`. Deselect **Show scrollbars** and **Show labels**. Click **OK**.
9. Save your changes.

Asset Guidelines

EDITIONS

Available in: **All** Salesforce CPQ Editions

Assets are records of non-subscription products that you quoted or sold to your customers. You can amend or renew your assets on an amendment quote or renewal quote.

Salesforce CPQ creates assets when you click **Contracted** on an opportunity or order. The asset creation process varies based on your account's renewal model and the value of the asset conversion field on the product you're contracting.

Let's review all the options for your asset conversion field.

- One per unit: Salesforce CPQ creates one asset record for each unit of the quote line as indicated by its quantity. For example, a quote line with a quantity of five for a non-subscription product would create five asset records each with a quantity of one.
- One per quote line: Salesforce CPQ creates one asset record that represents the entire quantity of the quote line or order product. For example, a quote line with a quantity of five for a non-subscription product would create one asset record with a quantity of five.
- None: Salesforce CPQ doesn't convert this quote line to an asset. This setup is useful if you're selling a one-time product that you don't need to renew or track. For example, you could sell a software license subscription and then include a product that represents a user training class. Your customers continue to renew the subscription, but they don't need to renew or track the training class.

Renewal model	User action	Asset Conversion	Result
Contract-based	• Contract Opportunity • Contract Order	• One-per-quote-line • One-per-unit	Salesforce CPQ creates asset records based on this product's asset conversion. View these records on your quote's account.
Contract-based	• Contract Opportunity • Contract Order	None	Salesforce CPQ doesn't create an asset record for this product on your account.
Asset-based	• Contract Opportunity • Contract Order	• One-per-quote-line • One-per-unit	Salesforce CPQ creates asset records based on this product's asset conversion. View these records on your quote's account.

Renewal model	User action	Asset Conversion	Result
Asset-based	• Contract Opportunity • Contract Order	None	Salesforce CPQ doesn't create an asset record for this product on your account.

Asset Conversion on Parent Assets

Salesforce CPQ follows unique logic when contracting bundle parents with one-per-unit asset conversion and component product options with one per quote line asset conversion.

SEE ALSO:

Amend Your Contracts

Amend Your Assets

Upgrade Assets

Asset Conversion on Parent Assets

Salesforce CPQ follows unique logic when contracting bundle parents with one-per-unit asset conversion and component product options with one per quote line asset conversion.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

One per Unit Parent Assets

In this case, Salesforce CPQ splits the options equally among the parent assets on the account.

Remember, One per Unit conversion is useful when the assets you're contracting have license numbers or IDs that you want to track individually.

Let's say you have a bundle parent on a quote line with a quantity of two and a component product option with a quantity of 10. The parent has One per Unit conversion and the component has One per Quote Line conversion. When you contract your opportunity, you end up with the following assets on your account.

Parent Asset 1
Quantity: 1

Parent Asset 1's Component Option
Quantity: 5

Parent Asset 2
Quantity: 1

Parent Asset 2's Component Option
Quantity: 5

Combine Units with Combine Key

The asset field Combine Key matches the quote line ID for the quote line that generated the asset. When you renew a contract, Salesforce CPQ evaluates assets with matching combine keys and rolls them back into a single quote line on the renewal quote. This process lets you combine asset lines back into single quote lines for discounting and management. You can then split them again for future renewal quotes. When Salesforce CPQ combines assets that are part of a bundle, it uses the Required by Asset field to rebuild bundle structure on the renewal quote.

Let's say you have an IT Professional Pack bundle with a quantity of two and a Laptop product option with a quantity of 4. The parent has one-per-unit conversion and the component has one per quote line conversion. When you contract your opportunity, you end up with the following asset records on your account.

Asset	Quote Line	Combine Key	Required by Asset	
IT Professional Pack	1	a0j36000008xiJiAAI	null	
IT Professional Pack	1	a0j36000008xiJiAAI	null	
Laptop	2	a0j36000008xiJoAAI	IT Professional Pack	
Laptop	2	a0j36000008xiJoAAI	IT Professional Pack	

Salesforce CPQ doesn't provide combine key values for assets that you upload from an external source. In this case, you enter a value manually.

Virtual Parent Assets

We also have a system for one-per-unit bundle parents that contain options with a type of Accessory or Related Product. Remember that accessories and related products have static quantities that don't change relative to the quantity of their parent.

Consider the following bundle. The parent has one-per-unit asset conversion, while the children have one per quote line asset conversion.

	Parent (Asset)	Laptop (Component)	Monitor (Accessory)	Printer (Related Product)
Quantity	2	4	2	3

When you contract this bundle, Salesforce CPQ has no way of determining how to allocate the accessories and related products among the two asset records. Instead, the system creates on your account an asset record to serve as the bundle parent for the accessories and related products. This record exists until you renew the contract and roll the accessories and related products back into their respective quote lines on an amendment quote or renewal quote. We call this record a virtual asset so users know that it exists only on the contract. The virtual asset has a lookup to the same quote line and account as your parent asset. It also has a name equal to your parent asset's name with "(Virtual)" at the end. All its other fields are null.

Note: Salesforce CPQ doesn't create virtual asset parents for nested one-per-unit bundle parents that contain an accessory or related product as a child option.

When you contract your IT bundle, Salesforce CPQ creates an IT Professional Pack (Virtual) to serve as the parent for monitor and printer. You can see this relationship by their Required by Asset values. The laptops are distributed evenly between the two IT Professional Packs. Every asset in the bundle has a lookup to IT Professional Pack (Virtual) on their Virtual Asset field, except the virtual asset itself. This lookup reminds you that the bundle contains a virtual parent and allows you to reference it as needed.

Asset Name	Type	Quantity	Combine Key	Required by Asset	Virtual Asset
IT Professional Pack (Virtual)	Asset	null	null	null	null
IT Professional Pack	Asset	1	a0j36000008xiJiAAI	null	IT Professional Pack (Virtual)

Asset Name	Type	Quantity	Combine Key	Required by Asset	Virtual Asset
IT Professional Pack	Asset	1	a0j36000008xiJiAAI	null	IT Professional Pack (Virtual)
Laptop	Component	2	a0j36000008xiJoAAI	IT Professional Pack	IT Professional Pack (Virtual)
Laptop	Component	2	a0j36000008xiJoAAI	IT Professional Pack	IT Professional Pack (Virtual)
Monitor	Accessory	2	a0j36000008xiJpAAI	IT Professional Pack (Virtual)	IT Professional Pack (Virtual)
Printer	Related Product	3	a0j36000008xiJmAAI	IT Professional Pack (Virtual)	IT Professional Pack (Virtual)

Subscription Guidelines

Subscription records contain information about subscription products on opportunities or orders that you've contracted.

When you contract an opportunity or order, your subscriptions inherit the following field values from their subscription product quote lines or order products.

- List Price
- Net Price
- Customer Price
- Quantity
- Account

EDITIONS

Available in: **All** Salesforce CPQ Editions

Let's look at some standard subscription fields. Later, we'll review subscription fields that affect your renewal process.

Start Date
The first date this subscription is in effect. Your subscription inherits this value from the start date of its parent contract.

End Date
The last date this subscription is in effect. Your subscription inherits this value from the end date of its parent contract.

Subscription Start Date
To override the Start Date field with a date of your choosing, enter a value for this field.

Subscription End Date
To override the Start Date field with a date of your choosing, enter a value for this field.

Subscription Proration Settings

The package-level Subscription Prorate Precision setting controls how Salesforce CPQ prorates subscription pricing. Set this field to Day, Month, or Monthly & Daily.

Root ID Field on Subscriptions

Salesforce CPQ uses the Root ID field to identify related subscription products in a bundle when you renew or amend subscriptions across multiple contracts.

Subscription Proration Settings

EDITIONS

Available in: Salesforce CPQ **Spring '15** and later

The package-level Subscription Prorate Precision setting controls how Salesforce CPQ prorates subscription pricing. Set this field to Day, Month, or Monthly & Daily.

The prorate multiplier listed on both the quote line and the order product record apply to any subscriptions you generate from the order products.

Use daily proration to calculate a subscription based on the specific number of days in a month. For example, you quote a product for 830 days and have a default subscription term of 365 days. Salesforce CPQ calculates 830 divided by 365 = 2.2740 as your proration multiplier.

Use monthly proration if your products and quotes are always in terms of full months. If you quote a product for 35 months and have a default subscription term of 12, Salesforce CPQ calculates 35 divided by 12 = 2.9167 as your proration multiplier. If you quote a product with a partial number of months, Salesforce CPQ rounds the subscription term up to the nearest whole number before dividing by the default subscription term: Quoting a product from January 1, 2017 through January 10, 2018 produces 12.1 months rounded to 13 months.

You can prorate subscriptions by whole month plus a fraction calculated by the remaining days. Salesforce CPQ first calculates the whole months of the effective subscription term and then converts the number of remaining days into a decimal. Remaining days are calculated as follows.

- Remaining days decimal = (Number of remaining days) * (Number of days in current year divided by default subscription term in months).
- The number of days in the current year is 365, or 366 if the current year includes a leap day on February 29.

For example, a subscription term of 2/23/15 through 9/30/17 calculates as 31.263 months.

- 2/23/15 through 9/22/17 = 31 full months.
- 9/23/17 through 9/30/17 = 8 days: 8 divided by (365 divided by 12) = 0.263 months.

Use this setting if you sell and price products by month or year but don't regularly quote for specific periods of time.

Root ID Field on Subscriptions

EDITIONS

Available in: Salesforce CPQ Winter '18 and later

Salesforce CPQ uses the Root ID field to identify related subscription products in a bundle when you renew or amend subscriptions across multiple contracts.

Salesforce CPQ gives a value to the Root ID field on a net-new (nonrevision) subscription product when you add it to a quote. Net-new subscription children of that product inherit their parent's root ID. In other words, for any net-new subscription in a bundle, Root ID always references the bundle parent that you first added to the quote.

You don't have to interact with this field. Salesforce CPQ references it when you renew or amend subscriptions across multiple contracts. In Salesforce CPQ Summer '17, when you picked a child subscription, Salesforce CPQ evaluated every available subscription to find other subscriptions in that bundle and pull them in for the renewal or amendment. This process often caused processing slowdowns for users with many subscriptions. Salesforce CPQ now uses the root ID to identify the original parent of your subscription immediately, which typically improves performance.

Example: You have a bundle with a bundle parent, child, and grandchild. All three products are subscriptions. A configuration rule on the bundle includes one child subscription for every unit of the parent subscription, while the grandchild is optional. You add this bundle to a quote without adding the grandchild subscription. Salesforce CPQ gives each subscription the same Root ID value as follows.

Table 43: Quote

Subscription	Root ID
Parent Subscription	a0t610000024BPCAA2
Child Subscription	a0t610000024BPCAA2

Contract your opportunity and amend the contract so you have an amendment opportunity and amendment quote. Go to your amendment quote and reconfigure your bundle to add a grandchild subscription, and then add another unit of the parent subscription. Your contract now has three more subscriptions. The grandchild you added has a Root ID value because it's a net-new subscription. The revised parent and child aren't net-new subscriptions, so they don't have a root ID.

Table 44: Contract

Subscription	Root ID	Revised Subscription
Parent Subscription	a0t610000024BPCAA2	N/A
Child Subscription	a0t610000024BPCAA2	N/A
Grandchild Subscription	a0t610000024BPCAA2	N/A
Parent Subscription		SUB-0000031
Child Subscription		SUB-0000032

CPQ Contract Fields

Contracts store information on the subscriptions that sales reps have quoted or ordered. They also contain fields that help customize your renewals and amendments.

EDITIONS

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Active Contract	SBQQ__ActiveContract__c	Formula (Number)	Select whether this contract is in effect.
Amendment & Renewal Behavior	SBQQ__AmendmentRenewalBehavior__c	Picklist	Determines how Salesforce CPQ calculates Renewal Start Date and Amendment End Date: • Latest End Date • Earliest End Date
Amendment Opportunity Record Type ID	SBQQ__AmendmentOpportunityRecordTypeId__c	Text(18)	The record type of a related amendment opportunity.
Amendment Opportunity Stage	SBQQ__AmendmentOpportunityStage__c	Text(60)	The opportunity stage for amendment

Field	API Name	Data Type	Definition
			opportunities created from this contract.
Amendment Owner	SBQQ__AmendmentOwner__c	Lookup(User)	Owner of the original opportunity from which the amendment was created.
Amendment Pricebook ID	SBQQ__AmendmentPricebookId__c	Text(18)	The ID of the pricebook associated with an amendment related to this contract.
Amendment Start Date	SBQQ__AmendmentStartDate__c	Date	The start date for amendment quotes created from this contract. If left blank, Salesforce CPQ uses the date of the amendment's creation.
Combine Subscription Quantities	SBQQ__SubscriptionQuantitiesCombined__c	Checkbox	Combine quantities of subscriptions for the same product into one line on renewal quotes and amendment quotes.
Default Renewal Contact Roles	SBQQ__DefaultRenewalContactRoles__c	Checkbox	Include contact roles from the original opportunity in the renewal opportunity.
Default Renewal Partners	SBQQ__DefaultRenewalPartners__c	Checkbox	Include the original opportunity partners in a renewal opportunity.
Disable Amendment Co-Term	SBQQ__DisableAmendmentCoTerm__c	Checkbox	Ignore the value of the Amendment and Renewal Behavior field on this record, and do not calculate an End Date for the amendment quote. If unchecked, Salesforce CPQ sets the amendment quote's end date according to the value of the Amendment Renewal & Behavior field on this record.
Evergreen	SBQQ__Evergreen__c	Boolean (Checkbox)	Indicates if the contract is evergreen or not.
Expiration Date	SBQQ__ExpirationDate__c	Formula (Date)	Contract end date for use in time-based workflows.
Master Contract	SBQQ__MasterContract__c	Checkbox	Designate this contract as the master contract for this account. Upon renewal, Salesforce CPQ rolls all contracts into this one.

Field	API Name	Data Type	Definition
MDQ Renewal Behavior	SBQQ__MDQRenewalBehavior__c	Picklist	Define how segmented subscription products appear on renewal Quotes. • De-Segmented: De-segmented poducts renew as a standard quote line with the last segment's data.
Opportunity	SBQQ__Opportunity__c	Lookup(Opportunity)	The opportunity that a sales rep contracted to create this contract.
Opportunity Pricebook ID	SBQQ__OpportunityPricebookId__c	Formula (Text)	The ID of the pricebook that the parent opportunity uses.
Order	SBQQ__Order__c	Lookup(Order)	The order that a sales rep contracted to create this contract record.
Preserve Bundle Structure	SBQQ__PreserveBundleStructureUponRenewals__c	Checkbox	Bundles on the renewal quote appear as you last configured them on the quote you're renewing. If you don't select this field, your bundles appear on the renewal quote as if you added them to the quote for the first time.
Quote	SBQQ__Quote__c	Lookup(Quote)	If a sales rep contracted an opportunity to create this contract, this field references that opportunity's primary quote.
Renewal Forecast	SBQQ__RenewalForecast__c	Checkbox	Create a renewal opportunity for forecasting purposes. This action does not create a renewal quote.
Renewal Opportunity	SBQQ__RenewalOpportunity__c	Lookup(Opportunity)	The renewal opportunity that tracks the renewal of this contract's subscriptions.
Renewal Opportunity Stage	SBQQ__RenewalOpportunityStage__c	Text(60)	Override the default stage of opportunities created by renewing this contract. Do this before selecting Renewal Forecast in order for the override to take effect on the renewal opportunity.

Field	API Name	Data Type	Definition
Renewal Owner	SBQQ__RenewalOwner__c	Lookup(User)	The owner of the original opportunity.
Renewal Pricebook ID	SBQQ__RenewalPricebookId__c	Text(18)	Choose a pricebook ID for renewal opportunities if you don't want to use the original opportunity's pricebook ID.
Renewal Quoted	SBQQ__RenewalQuoted__c	Checkbox	Create a renewal quote and renewal opportunity.
Renewal Term	SBQQ__RenewalTerm__c	Number(18, 0)	Set the length of the renewal. By default, the renewal term matches the contract's term.

CPQ Asset Fields

Salesforce CPQ provides various custom managed fields for the asset object.

EDITIONS

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Additional Disc. (%)	SBQQ__Discount__c	Percent(9, 2)	Percentage-based discount for this asset. Sales reps can edit this field in the quote line editor.
Additional Disc. (Amt)	SBQQ__AdditionalDiscountAmount__c	Currency(12, 2)	Amount-based discount for this asset. Sales reps can edit this field in the quote line editor.
Bundled	SBQQ__Bundled__c	Checkbox	This asset's product is part of a bundle.
Combine Key	SBQQ__CombineKey__c	Text(18) (External ID)	Assets with the same combine key are rolled up into a single quote line upon amendment or renewal. The combine key is equal to the related quote line's quote line ID.
Component Discounted By Package	SBQQ__ComponentDiscountedByPackage__c	Checkbox	If this asset is related to a component product, the component inherits its parent's additional discount.

Field	API Name	Data Type	Definition
Credit Product ID	SBQQ__CreditProductId__c	Formula (Text)	ID of upgrade credit product for this asset
Current Subscription	SBQQ__CurrentSubscription__c	Lookup(Subscription)	Subscription that covers this asset. Automatically populated if only one subscription covers this asset. Renewals overwrite this value with the new subscription
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup(Discount Schedule)	The discount schedule that covers this asset.
Discount Schedule Type	SBQQ__DiscountScheduleType__c	Picklist	The type of discount schedule that covers this asset.
Distributor Discount	SBQQ__DistributorDiscount__c	Percent(3, 2)	Salesforce CPQ applies distributor discounts instead of partner discounts.
Dynamic Option ID	SBQQ__DynamicOptionId__c	Text(40)	Contains feature ID and Product ID to identify the feature and optional SKU associated with this line.
From Service Cloud	SBQQ__FromServiceCloud__c	Checkbox	Indicates whether this asset was created in the service cloud.
Latest Quote Line	SBQQ__LatestQuoteLine__c	Lookup(Quote Line)	Lookup to a quote line record.
List Price	SBQQ__ListPrice__c	Currency(12, 2)	The list price for this asset.
Markup (%)	SBQQ__MarkupRate__c	Percent(6, 2)	Percentage-based discount for this asset. Sales reps can edit this field in the quote line editor.
Markup (Amt)	SBQQ__MarkupAmount__c	Currency(12, 2)	Amount-based discount for this asset. Sales reps can edit this field in the quote line editor.
Number	SBQQ__Number__c	Number(5, 0)	This line's position within its quote or quote line group.
Option Discount (%)	SBQQ__OptionDiscount__c	Percent(3, 2)	If this line is for an optional SKU, this field captures any percentage-based discount given to the package and extended to the option.
Option Discount (Amt)	SBQQ__OptionDiscountAmount__c	Currency(10, 2)	If this line is for an optional SKU, this field captures any amount-based discount given

Field	API Name	Data Type	Definition
			to the package and extended to the option.
Option Level	SBQQ__OptionLevel__c	Number(5, 0)	Indicates nest level of this option (only applies to lines generated from options)
Option Type	SBQQ__OptionType__c	Picklist	Option types determine how this child product quantities are calculated relative to the quantity of the bundle parent. This value is copied from the asset's related product option.
Order Product	SBQQ__OrderProduct__c	Lookup(Order Product)	The order product related to this asset.
Original Quantity	SBQQ__BundledQuantity__c	Number(10, 2)	For assets with calculated quantities, this field holds the original user-entered quantity.
Original Unit Cost	SBQQ__OriginalUnitCost__c	Currency(12, 2)	This asset's original unit cost at the time of purchase, before cost schedules were applied.
Package	SBQQ__Bundle__c	Checkbox	Indicates whether this asset's related line item is part of a bundle.
Parent Product	SBQQ__RequiredByProduct__c	Lookup(Product)	Lookup to this asset's bundle parent.
Partner Discount	SBQQ__PartnerDiscount__c	Percent(3, 2)	Partner discounts are applied after automatic discount. Salesforce CPQ shows the result of partner discounts in the quote line's partner price.
Price Dimension	SBQQ__Dimension__c	Formula (Text)	If this asset is related to an MDQ product, this field shows the price dimension for its MDQ segment.
Pricing Method	SBQQ__PricingMethod__c	Picklist	Indicates how the price for this line item is calculated. List pricing subtracts discounts from a list price. Cost pricing adds markups to a cost price.
Product Option	SBQQ__ProductOption__c	Lookup(Product Option)	If this asset is related to a quote line that's part of a bundle, this

Field	API Name	Data Type	Definition
			field looks up to the quote line's product option record.
Quote Line	SBQQ__QuoteLine__c	Lookup(Quote Line)	The quote line that created this asset.
Regular Price	SBQQ__RegularPrice__c	Currency(12, 2)	Regular price for this Asset
Renewal Uplift (%)	SBQQ__RenewalUpliftRate__c	Percent(8, 3)	Percentage rate of renewal price increases
Required By Asset	SBQQ__RequiredByAsset__c	Lookup(Asset)	This Asset's parent Asset. If populated, this Asset is a child in a bundle
Required By Id	SBQQ__RequiredById__c	Text(18)	The ID of the parent record that requires this record.
Required By Subscription	SBQQ__RequiredBySubscription__c	Lookup(Subscription)	This Asset's parent Subscription. If populated, this Asset is a child in a bundle
Revised Asset	SBQQ__RevisedAsset__c	Lookup(Asset)	When you increase or decrease asset quantity on an amendment, Salesforce CPQ creates a revision asset record to represent the change in quantity.
Root Asset (CPQ)	SBQQ__RootAsset__c	Lookup(Asset)	The top-level bundle parent for this asset.
Segment Index	SBQQ__SegmentIndex__c	Number(2, 0)	For MDQ products, this value represents this asset's position in the MDQ segment table.
Segment Key	SBQQ__SegmentKey__c	Text(30)	This value is shared between MDQ Product segments and used to group related segments together in the Quote Line Editor
Segment Label	SBQQ__SegmentLabel__c	Text(25)	For MDQ products, this value represents the column header label (for example, "Year 1") associated with this line
Subscribed Product	SBQQ__Subscription__c	Lookup(Product)	If a percent of total product covers this asset, this field looks up to the record for that product.

Field	API Name	Data Type	Definition
Subscription End Date	SBQQ__SubscriptionEndDate__c	Date	The end date for the percent of total product that covers this asset.
Subscription Quote Line	SBQQ__SubscriptionQuoteLine__c	Lookup(Quote Line)	Lookup to a related subscription quote line
Subscription Start Date	SBQQ__SubscriptionStartDate__c	Date	The start date for the percent of total product that covers this asset.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	The discount schedule for discounts based on subscription term. Setting this to "Group" applies the discount rate for the group term, while setting it to "Quote" applies the discount rate for the entire quote term, regardless of the different terms in your groups.
Virtual Asset	SBQQ__VirtualAsset__c	Lookup(Asset)	Salesforce CPQ uses virtual assets when a One Per Unit Bundle contains a component asset for an accessory or related product. The virtual asset serves as the bundle parent for the accessories and related products until a user renews the contract and rolls them back into their respective quote lines.

Service Cloud for Salesforce CPQ

EDITIONS

Available in: Service Cloud for Salesforce CPQ 2.1 and later with Salesforce Spring '16 25.0.13 and later

Salesforce CPQ's Service Cloud integration package provides sales contract features to Service Cloud users. When you enable the Service Cloud Integration package, Salesforce CPQ replaces contracts with service contracts and subscriptions with service contract line items.

With the Service Cloud Integration package enabled, Salesforce CPQ creates service contracts and contract line items when users perform the following actions in an org with contract-based renewals.

- Contracting an opportunity that contains a primary quote with subscription products, a start date, and a subscription term or end date
- Contracting an order that contains subscription order products and an uncontracted opportunity for the quote the user ordered from

Feature Availability

The Service Cloud for Salesforce CPQ package contains the following limitations.

- Summary variables in price rules can't target contract line items.
- Users can't perform asset-based renewals.

As of Service Cloud Integration Package 2.1 and Salesforce CPQ Spring '16 version 25.0.13, all other Salesforce CPQ Sales Contract amendment, renewal, and contracting features are available for service contracts.

The current Service Cloud for Salesforce CPQ version is 210.3, which requires Salesforce CPQ Winter '18 or later.

Enable Entitlements in Salesforce CPQ
Enable entitlements so you can use service contracts with a Service Cloud-integrated CPQ org.
Entitlement Creation in Service Cloud for Salesforce CPQ
Manage the entitlement generation process when working with Service Cloud for Salesforce CPQ.

Enable Entitlements in Salesforce CPQ

Enable entitlements so you can use service contracts with a Service Cloud-integrated CPQ org.

EDITIONS

Available in: Service Cloud for Salesforce CPQ 2.1 and later with Salesforce Spring '16 25.0.13 and later

1. From Setup, in the Quick Find box, enter `Entitlement Settings`, then select **Entitlement Settings**.
2. Select Enable Entitlement Management.
   Salesforce CPQ shows the Entitlement Management Settings page.
3. Select the entitlement features you want to activate or deactivate.
4. Save your changes when you're finished.

When you contract an order, or an opportunity with a primary quote containing subscription products, a start date, and subscription term or end date, Salesforce CPQ creates a service contract with contract line items instead of a sales contract and subscriptions. You can also access service contracts within the Salesforce Build menu or Tabs menu, and create service contracts from opportunities.

Entitlement Creation in Service Cloud for Salesforce CPQ

Manage the entitlement generation process when working with Service Cloud for Salesforce CPQ.

EDITIONS

Available in: Service Cloud for Salesforce CPQ 2.1 and later with Salesforce Spring '16 25.0.13 and later

The Service Cloud Integration package controls entitlement generation with the Entitlement Conversion product field, which contains the following values.

- None
- One per Quote Line
- One per Unit

The value you choose has a different effect on your entitlement conversion process based on the product's type and its asset conversion value.

Type of Product	Asset Conversion	Entitlement Conversion
Subscription	None. Subscriptions do not create assets.	• None: No entitlement generated • One per Quote Line: Salesforce CPQ creates an entitlement for each quote line. The entitlement's

Type of Product	Asset Conversion	Entitlement Conversion
		contract line item looks up to the subscription's contract line used to generate the entitlement • One per Unit: Salesforce CPQ creates one entitlement for each unit of quantity. Each entitlement asset field looks up to the asset used to generate the entitlement.
Subscription Percent of Total	None. Subscriptions do not create assets.	• None: Salesforce CPQ does not create an entitlement for the percent of total product or any of its covered assets. • One per Quote Line: Salesforce CPQ creates an entitlement for each quote line. The entitlement's contract line item looks up to the subscription's contract line used to generate the entitlement • One per Unit: Salesforce CPQ creates one entitlement for each unit of quantity. Each entitlement asset field looks up to the asset used to generate the entitlement.

Amend Your Contracts and Assets

Add products or edit product quantities on your contracts. If you're using an asset-based renewal model, you can change the assets on your quotes and orders.

Your account's renewal model and your use case determine the way you perform amendments. Regardless of your method, Salesforce CPQ creates an amendment opportunity and an amendment quote. The amendment quote contains all the products from your original quote. You can also add products to the amendment quote.

EDITIONS

Available in: **All** Salesforce CPQ Editions

We'll review amendment methods and some key fields at a high level here. Later, you can check out our tasks for step-by-step explanations and examples.

Renewal model	Use case	Actions	Results
Contract Based	You made a contract from your opportunity. Your customer wants to change their contract.	To create an amendment quote, click **Amend** on your contract or **Amend Contract** on your opportunity.	• Salesforce CPQ creates an amendment opportunity and amendment quote. • The amendment quote contains all the products from your original quote. You can adjust the quantities of these products or add new products. • The amendment opportunity reflects the product and quantity differences between your original quote and your amendment quote.
Contract Based	You made a contract from your order. Your customer wants to change their contract.	To create an amendment quote, click **Amend** on your contract or **Amend Contract** on your opportunity.	• Salesforce CPQ creates an amendment opportunity and amendment quote. • The amendment quote contains all the products from the order you contracted. You can adjust the quantities of these products or add new products. • The amendment opportunity reflects the product and quantity differences between your original quote and your amendment quote. • Order your amendment quote to resume the ordering process.
Asset Based	You created assets by contracting your opportunity or order. Your customer wants to change their quote or order.	To amend assets, click **Amend Assets** on your account or opportunity.	• Salesforce CPQ creates an amendment opportunity and amendment quote. • The amendment quote contains all the products from your quote or order. You can adjust the quantities of these products or add new products.

Renewal model	Use case	Actions	Results
			• The amendment opportunity reflects the product and quantity differences between your original quote and your amendment quote.

CPQ Amendment Field Guidelines

Salesforce CPQ provides several fields that let you automate and customize the amendment process. You can find these fields on your account records and contract records.

Amend Your Contracts

Amend your contracts when a customer wants to add new products or change products that you've quoted or sold.

Guidelines for Amending from a Contract with Multiple Subscription End Dates

If your contract contains subscriptions with different end dates, you can control how Salesforce CPQ sets the start and end dates of your amendment quotes. This feature is useful if you don't want an amendment quote to coterminate with the original contract.

Amend Your Assets

You can amend your assets from your account. Use this process in accounts with asset-based renewal models. You can also use it in a contract-based account if you want to amend an asset and you're unsure of its location on your contract.

Create an Add-On Opportunity

Add more products to a contract and ensure that they terminate on the same date. While these products exist on a separate opportunity record, Salesforce CPQ matches their termination dates to the termination date on the contract's original opportunity.

Amendment Processes

Salesforce CPQ offers several ways to manage the subscriptions and assets you're amending.

CPQ Amendment Field Guidelines

Salesforce CPQ provides several fields that let you automate and customize the amendment process. You can find these fields on your account records and contract records.

EDITIONS

Available in: **All** Salesforce CPQ Editions

Account Fields

Contract Co-Termination

Define how Salesforce CPQ sets the end dates of amendment quotes you create through an add-on opportunity. These actions happen after you create and save your add-on opportunity.

- Prompt: Salesforce CPQ shows an Existing Contracts page that lists all active contracts on your account. Your amendment quote inherits the end date of the contract you choose.
- Always: Salesforce CPQ sets your amendment quote's end date to the earliest end date of all contracts on your account.
- Never: Salesforce CPQ does not provide a value for your amendment quote's end date.

Preserve Bundle Structure

Bundles on the amendment quote appear as you last configured them on the quote you're amending. If you don't select this field, your bundles appear on the amendment quote as if you added them to the quote for the first time.

Contract Fields

Amendment Start Date

Define a start date for amendment quotes created from this contract. If you leave this field blank, the amendment quote starts on the day you perform the amendment.

Disable Amendment Co-Term

Prevent Salesforce CPQ from setting an end date for your amendment quote. If you don't select this field, Salesforce CPQ sets an end date based on the value of your contract's Amendment & Renewal Behavior field.

Amendment & Renewal Behavior

Define how Salesforce CPQ determines your amendment quote's end date.

- Latest End Date: Your amendment quote inherits its end date from the latest end date among all subscriptions on the contract you're amending.
- Earliest End Date: Your amendment quote inherits its end date from the earliest end date among all subscriptions on the contract you're amending.

Some of the contracts you amend might have different end dates among all their subscription records. Use this field if you don't want the amendment quote to have the same end date as your contract.

Amend Your Contracts

EDITIONS

Available in: **All** Salesforce CPQ Editions

Amend your contracts when a customer wants to add new products or change products that you've quoted or sold.

- Make sure that your account has a contract-based renewal model. If you want your bundle configurations to carry over from the quote you're amending, make sure **Preserve Bundle Structure** is selected on your account.
- You can amend from an active contract or from a contracted opportunity related to an active contract. If you're amending from a contracted opportunity, make sure that its Contracted field has been selected.

1. Click **Amend** on your contract, or click **Amend Contract** on your opportunity. Both records provide the same amendment workflow. Amending a contract from an opportunity is available for users who don't have access to the contract object.
   - Amending from your contract takes you to the Amend Contract page, which shows your contract's amendable active subscriptions and amendable evergreen subscriptions.
   - Amending from your opportunity takes you to the Existing Contracts page, which shows your account's amendable active contracts and amendable evergreen contracts. Choose a contract, then click **Select**.
2. Review your subscriptions, and then click **Amend**.
   Salesforce CPQ creates the following records.
   - An amendment opportunity with a close date equal to your contract's start date. The amendment opportunity has a name of "Amendment for contract #[your contract ID]."
   - An amendment quote with start and end dates equal to your contract's start and end dates. This quote contains all the subscriptions and assets from your original quote.
3. Adjust the quantity of the quote lines from your original quote or add new products, and then save your changes.

   You can amend assets to have a lower quantity only if their related product record has an asset amendment behavior of Allow Refund.

Salesforce CPQ calculates product quantity and price on your amendment opportunity based on the difference of the original quote and the amendment quote. The amendment opportunity updates its Amended Contract and Primary Quote fields with links to the contract you amended and your original quote.

SEE ALSO:

Asset Guidelines

Guidelines for Amending from a Contract with Multiple Subscription End Dates

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

If your contract contains subscriptions with different end dates, you can control how Salesforce CPQ sets the start and end dates of your amendment quotes. This feature is useful if you don't want an amendment quote to coterminate with the original contract.

Select the contract field **Disable Amendment Co-Term** to prevent amendment quotes on the contract from inheriting the contract's end date. When you amend your contract, Salesforce CPQ evaluates the contract field Amendment and Renewal Behavior to set the start and end dates of the contract's renewal quotes. The value of Amendment and Renewal Behavior affects amendment quotes made from your contract as follows.

- Latest End Date: Amendment quotes on this contract set their end dates to the latest end date among all the contract's subscriptions.
- Earliest End Date: Amendment quotes on this contract set their end dates to the earliest end date among all the contract's subscriptions.

Example: Let's say you sell IT maintenance licenses as 12-month subscription products. You always want to capture a full year of pricing for each license you sell when you make the sale.

You sell 10 licenses with 12-month terms on January 1, 2018, and create a contract for these subscriptions. Then you sell another five licenses on March 1 and plan on amending your contract. By default, the five new subscriptions on the amendment quote inherit the contract's end date of 12/31/2018. However, to cover a full year of pricing, those licenses have to run through 2/28/2019.

Before you make your amendment, select **Disable Amendment Co-Term** in your contract, and then set Amendment and Renewal Behavior to Latest End Date. When you amend the contract and add your five subscriptions, you'll end up with an amendment quote that runs from 3/1/2018 through 2/28/2019. This process ensures that you quote the whole year of subscriptions up front for your five other licenses.

When the original quote comes up for renewal on 12/31/2018, Salesforce CPQ renews all 15 subscriptions onto the same renewal quote.

Example: You have a contract with a start date of 01/01/2018, an end date of 12/31/2018, and several subscription products.

Table 45: Contract

Subscription	Start Date	End Date
Bronze Maintenance	01/01/2018	12/31/2018
Silver Maintenance	02/01/2018	08/31/2018
Gold Maintenance	05/01/2018	12/01/2018

When you're ready to amend this contract, you have a few options based on your contract's amendment and renewal behavior.

If your amendment and renewal behavior is the latest end date, your amendment quote has a start date of 01/01/2018 and an end date of 12/31/2018. Your quote lines then have the following dates.

Table 46: Amendment Quote

Quote Line	Start Date	End Date
Bronze Maintenance	01/01/2018	12/31/2018
Silver Maintenance	02/01/2018	12/31/2018
Gold Maintenance	05/01/2018	12/31/2018

If your amendment and renewal behavior follows the earliest end date, your amendment quote has a start date of 01/01/2018 and an end date of 08/31/2018. The quote lines for your subscription products then have the following dates.

Table 47: Amendment Quote

Quote Line	Start Date	End Date
Bronze Maintenance	01/01/2018	08/31/2018
Silver Maintenance	02/01/2018	08/31/2018
Gold Maintenance	05/01/2018	08/31/2018

Amend Your Assets

You can amend your assets from your account. Use this process in accounts with asset-based renewal models. You can also use it in a contract-based account if you want to amend an asset and you're unsure of its location on your contract.

EDITIONS

Available in: **All** Salesforce CPQ Editions

1. Make sure that your account has an asset based renewal method.
2. Click **Amend Assets** on your account.
   Salesforce CPQ displays the Asset Selection page. This page displays all the assets you created when you contracted the opportunities or orders related to primary quotes on your account.
3. Select the assets you want to amend and click **Amend**.
   Salesforce CPQ creates an amendment quote and opens it in the quote line editor. This amendment quote looks up to an amendment opportunity on your account.
4. Amend your quote as needed and then click **Save**.

   You can add new products, increase quote line quantities, or decrease quote line quantities. If the product you're amending has its asset amendment behavior set to Allow Refund, you can reduce its quantity to zero. You cannot apply discounts to an asset that you're amending.

   Salesforce CPQ calculates product quantity and price on your amendment opportunity based on the difference of the original quote and the amendment quote. The amendment opportunity updates its Primary Quote fields with a link to your original quote.

SEE ALSO:

Asset Guidelines

Create an Add-On Opportunity

Add more products to a contract and ensure that they terminate on the same date. While these products exist on a separate opportunity record, Salesforce CPQ matches their termination dates to the termination date on the contract's original opportunity.

EDITIONS

Available in: **All** CPQ Editions

1. Go to your account and set the contract co-termination fields to allow users to create add-on quotes.
   a. Set contract co-termination to Prompt or Always.
   b. Set the co-termination event to Add-on.
2. On the same account, find the contract that you want to co-terminate with. Click **Activate** if it's not yet activated.
3. Create an opportunity on your account. We recommend naming it something like "Add-on Opportunity" so you can clearly identify it.
4. Set a close date in the future somewhere within the timeframe of your original contract.
5. Set the opportunity's stage to Proposal/Price Quote.
6. From the opportunity's quotes related list, **New Quote**. Select your quote's primary quote field.
7. Since you enabled co-termination in Step 1, Salesforce CPQ shows the existing contracts page after you save your quote. This page shows all the active contracts and evergreen contracts on your account. Select the contract you want to include in your add-on opportunity.
   Salesforce CPQ shows the product selection page.
8. Add products on the product selection page. You can also adjust the quote's start date if needed. Moving the start date forward prorates your quote's subscription products. The proration calculation uses the end date of the contract you selected in Step 4. We call this process co-termination, because all your new products inherit the end date of the contract that you associated with this add-on opportunity.
9. When you're done adding products, go back to your account and review the contract you associated with your add-on opportunity. In the Subscriptions related list, you'll see the subscriptions that you just added and the contract's original subscriptions. The subscriptions you added have your new quote's start date, but all subscriptions have the same end date.

Amendment Processes

Salesforce CPQ offers several ways to manage the subscriptions and assets you're amending.

EDITIONS

Available in: **All** Salesforce CPQ Editions

Amending MDQ Products
Amend a contract containing MDQ products. This process is useful if you want to change a multiple-year contract partway through its term.

Terminating Subscriptions
Remove a subscription when making an amendment.

Upgrade Assets
Replace an asset with a different asset from within the quote line editor. This feature is useful for processing upgrades.

Amending MDQ Products

Amend a contract containing MDQ products. This process is useful if you want to change a multiple-year contract partway through its term.

EDITIONS

Available in: **All** CPQ Editions

When you amend a contract that contains MDQ products, your amendment quote contains only future MDQ segments. Past segments aren't available for amending.

You can amend any editable field on each segment of your amended MDQ product.

Follow these guidelines when amending an MDQ product.

- Segment quantities on an amended MDQ product match segment quantities from the original quote and any prior amendments. You can change any of these segment quantities.
- The product record for an amended MDQ subscription record contains a lookup to the subscription record it was amended from.
- You can change the uplift amount on an MDQ product's first segment by amending the segment into a different discount schedule or block pricing tier.

Terminating Subscriptions

Remove a subscription when making an amendment.

EDITIONS

Available in: **All** CPQ Editions

To terminate a subscription, reduce the quantity of the related quote line to zero on your amendment quote. When you contract the opportunity containing that quote, Salesforce CPQ sets the Terminated Date value of the new subscription record to one day before the amendment quote's start date.

When you amend a contract containing terminated subscriptions, the amendment quote doesn't contain lines for the terminated subscriptions.

Upgrade Assets

Replace an asset with a different asset from within the quote line editor. This feature is useful for processing upgrades.

EDITIONS

Available in: **All** CPQ Editions

1. Select **Enable Asset Upgrades** in your line editor package settings.
2. Create a product to represent the price difference between your original product and the product you're upgrading to.

   We refer to this product as the upgrade product. We recommend naming it to indicate that it's the price difference and not the upgrade product itself. For example, "Standard-to-Professional Edition Upgrade."

3. Find your upgrade product and create a record in its Upgrade Source related list. Set your upgrade source record's Source Product field to the product you want to upgrade from.

   Upgrade products can come from multiple upgrade sources. For example, you can upgrade a Standard Edition or a Professional Edition to an Enterprise Edition. The Upgrade Source related list contains a record for each possible source on an upgrade product.

4. Enter a value for your upgrade product's Upgrade Target field. This value is a lookup to the product that replaces the upgrade product when you create an asset.
5. Click **Upgrade Assets** in the quote line editor or **Show Available Upgrades** in the configurator. These selections show the Asset Selection page.
6. If the asset you want to upgrade is part of a bundle, click **Show Available Upgrades**.
7. The Asset Selection page lists all upgradable assets on the account and radio selection buttons for each of their available upgrade products. Select the upgrades you want, and then click **Select**.

Salesforce CPQ replaces the upgrade sources with the upgrade products you selected and adjusts your quote's total accordingly. When you renew a quote containing upgrade products, Salesforce CPQ replaces them with their upgrade targets on the renewal quote.

Upgrade Assets Through an Amendment

Amend an upgrade onto an asset. This procedure lets you change or upgrade licenses, add more licenses, and add new products all through the amendment process.

Upgrade CPQ Products by Ratios

Configure your upgrade products so that the upgrade target changes its quantity by a ratio relative to the upgrade source's quantity.

Upgrade a Bundle

Upgrade a bundle within the CPQ quote line editor. When you upgrade a bundle that has matching product options in the upgrade source and upgrade target, Salesforce CPQ maps the source's configuration, product option quantity, and attribute field values to the corresponding options on the upgrade target.

SEE ALSO:

Asset Guidelines

Upgrade Assets Through an Amendment

EDITIONS

Available in: **All** CPQ Editions

Amend an upgrade onto an asset. This procedure lets you change or upgrade licenses, add more licenses, and add new products all through the amendment process.

Let's say you're a sales rep who wants to update a Bronze Widget asset to a Silver Widget asset. You start with the following.

- A quote with 5 Bronze Widgets
- A percent of total subscription that is 10 percent of the Bronze Widget line's net price.
- A Bronze-to-Silver upgrade option.

1. Make sure you've enabled the Subscriptions and Renewals package setting Include Net-new Products in Maintenance. This setting ensures that Salesforce CPQ considers any products added during a renewal or amendment when calculating the new price of a percent of total product from the original quote.
2. Contract the opportunity containing your asset, then navigate to the new contract. This contract contains your percent of total subscription as a subscription item and your Bronze Widget as a subscribed asset.
3. On the contract, click **Amend**. On the Amend Contract page, you see your percent of total product.
4. Click **Amend** on the Amend Contract page. You see the quote line editor.
5. Reduce the quantity of the Bronze Widgets from 5 to 2, and then save your changes.

   A reduction triggers an error message because of a Salesforce CPQ validation rule on amendments that prevents users from amending products with a negative quantity change. You can override this rule by upgrading assets so the overall asset total in the quote line has at least one new upgraded asset line item. You'll create this asset in the following steps.
6. Click the down arrow next to Add Products, and then click **Upgrade Assets**. You see all the assets in your account, which include your Bronze Widgets. Select the checkbox next to the Bronze Widget, and then click **Select**.
7. On the page with your available upgrades, select **Bronze-to-Silver Upgrade**, and then click **Select**.
8. In the quote line editor, change the quantity of the new line item containing the Bronze-to-Silver Upgrade to 3.

The total quantity of the remaining Bronze Widgets and the Bronze-to-Silver Upgrade don't have to add up to the original value of five. By default, Salesforce CPQ allows any number of upgrade items above zero. You can also configure rules for a nonzero minimum or maximum upgrade quantity.

9. Click **Calculate**. The percent of total product increases its price accordingly to cover the price of the upgrade product. If you configured your upgrade product to include an upgrade credit product, that product also appears in your quote.
10. Save the quote and contract your amendment.
11. Navigate to your account and look at the Assets related list. It shows the following.
    - A quantity of 5 for your Bronze Widgets, a historical record of the original purchase
    - A quantity of 3 for your Silver Widgets, the upgraded widgets
    - Another Bronze Widget listing with a quantity of -3, the asset reduction

    The subscriptions related list shows a new subscription that represents the increase to the overall price on your percent of total product.

Upgrade CPQ Products by Ratios

Configure your upgrade products so that the upgrade target changes its quantity by a ratio relative to the upgrade source's quantity.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Make sure that your upgrade source page layout has the Upgrade Conversion Rate field.

Select **Enable Multi Line Delete** in your line editor package settings.

The value of Upgrade Conversion Rate creates a ratio of quantity conversion from your upgrade source to your upgrade product. For example, a value of 5:1 means that five units of your upgrade source convert to one unit of the upgrade product.

You can perform a ratio-based upgrade only on an amendment quote.

Tip: Remember that your assets have to be covered by a percent of total product if you want to amend them on an amendment quote.

1. In your upgrade product, create an upgrade source.
2. On your upgrade source, provide a value for the Upgrade Conversion Rate field. For example, 3:1.
3. Open an amendment quote that contains the product you want to upgrade.
4. Click **Upgrade Assets** if you're upgrading a stand-alone product, or configure a bundle and click **Show Available Upgrades**.
5. Choose the asset you want to upgrade, and then choose your upgrade product.
   On the quote line editor, you see your source product and one unit of your upgrade product adjusted based on your conversion rate. If you have a ratio of 3:1 and your source product has a starting quantity of 100, your source product updates its quantity to 97.
6. Increase or decrease the quantity of your source product and your upgrade product. Salesforce CPQ adjusts their quantities accordingly.

Example: You sell a Bronze IT Support package and a Silver IT Support package. Both products are assets in Salesforce CPQ. Bronze package customers can order an upgrade to the Silver package, which you provide as an upgrade product called Upgrade Bronze to Silver. All your IT support packages are covered by a percent of total subscription.

Your company wants a system where users can upgrade five bronze packages to one silver package. To start out, you need the following products.

- Bronze IT Package
  - Contains the Silver IT Package product record in the Target Upgrade related list.
- Upgrade Bronze to Silver

  - Upgrade Source with an upgrade conversion ratio of 5:1 and source product that looks up to your bronze IT package

- Percent of Total

You contract an opportunity for 100 bronze packages. Your customer then wants to upgrade to 20 silver packages.

1. Go to your contract and amend it.
2. Open your amendment quote and click **Amend Assets**.
3. Select your bronze package and then your upgrade bronze to silver product.
4. Change the quantity of your Upgrade Bronze to Silver product from 1 to 4. Salesforce CPQ reduces the quantity of your Bronze IT Package to 80.
5. Save your amendment quote and contract it. Your contract contains 80 Bronze IT Packages and 20 Silver IT Packages.

Upgrade a Bundle

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

Upgrade a bundle within the CPQ quote line editor. When you upgrade a bundle that has matching product options in the upgrade source and upgrade target, Salesforce CPQ maps the source's configuration, product option quantity, and attribute field values to the corresponding options on the upgrade target.

Admins can easily create an upgrade target bundle with the same product options as the source bundle.

1. Go to the upgrade target that you want sales reps to upgrade toward and click **Clone With Related**.
2. Rename the cloned parent product to a name that your sales reps can easily recognize.
3. Go to the upgrade product's Upgrade Source related list and create a new upgrade source. The new upgrade source defines the relationship between the source and the target you specified.
4. Price the parent product's price book entry to represent the price that Salesforce CPQ quotes when upgrading from the upgrade source to the upgrade target.

Your contracted primary quote should already have the source product bundle. To upgrade a bundle, you'll have to amend the contract.

1. From your amendment quote, click **Upgrade Assets**.
2. Select the standard or source parent product that you want to upgrade.
3. Select your upgrade parent product.
   Salesforce CPQ compares your upgrade source bundle's configuration to the upgrade product's configuration. It then adds quote lines for any product options that match the upgrade source. Your upgrade product options inherit the configuration attributes, quantity, and quote line field values from the source product options.
4. You can also configure product bundles so that you can add options unique to the upgrade target, and upgrade previously purchased source product options to their related upgrade products.
5. When you contract the amendment quote, Salesforce CPQ creates assets and subscriptions for the upgrade bundle product's upgrade target and all of the target's children. If the child is an upgrade product, you'll need to do two things.
   - Swap the product with the upgrade target product
   - Swap the product option to the upgrade target's product option. This way, users can reconfigure the bundle on future renewals and amendments.

Example: Your amendment quote contains a small business server bundle that you want to upgrade to an enterprise server bundle. Both bundles contain the same product options.

Small Business Server
: Document CAL
: Maintenance SKU

Enterprise Server
: Document CAL
: Maintenance SKU

1. In the quote line editor, click **Upgrade Assets**.
2. In the upgrade asset selection page, select the SMB Server as the parent product that you want to upgrade.
3. In the upgrade product selection page, select the SMB to Enterprise Server upgrade product.

When you return to the quote line editor, the SMB Enterprise Server Upgrade bundle automatically added ten document CALs and one maintenance SKU. If your upgrade source and upgrade target have a 1:1 conversion ratio, Salesforce CPQ reduces the quantity of the small business server and its product options to zero. You can also configure the small business to enterprise server upgrade product to add product options that are unique to the enterprise server bundle. From here, you can contract the amendment.

1. Go to the quote's amendment opportunity and contract the amendment.
2. Go to your parent account and review the assets related list. You should see the small business server and its children with negative values, as these products were removed and upgraded. Likewise, the enterprise server and its children will have positive values.

When you contracted the upgrade amendment, Salesforce CPQ decommissioned previously purchased assets, then made new assets for the upgraded product options. Assets with negative quantities and the small business server asset itself have the same usage end date. Salesforce CPQ mapped the usage end date field values from the source product to the upgrade product, just like it mapped quantity values when upgrading the bundle.

Renew Your Contracts and Assets

Renew a contract when your subscriptions are about to reach their end date. If you're using an asset-based renewal model, you can renew a percent of total product and its covered assets.

Your account's renewal model and your use case determine the way you perform renewals. Regardless of your method, Salesforce CPQ creates a renewal opportunity and renewal quote. The renewal quote contains all the products you're renewing. You can also add new products to the renewal quote.

EDITIONS

Available in: **All** Salesforce CPQ Editions

We'll review renewal methods at a high level here. Later, you can check out our tasks for step-by-step explanations and examples.

Renewal model	Use case	Actions	Results
Contract-based	The subscriptions on one contract are near their end dates and your customer wants to renew them for another term of service.	To create a renewal quote from your contract, click **Renewal Quoted** on your contract record.	• Salesforce CPQ creates a renewal opportunity and renewal quote. • The renewal quote contains all the subscriptions and

Renewal model	Use case	Actions	Results
			covered assets from your contract.
Contract-based	The subscriptions on several of your account's contracts are near their end dates. Your customer wants to renew them, and you want to move all the renewed subscription products into a single renewal opportunity.	To renew contracts from your account, go to your account's Contracts related list, select all the contracts to renew, and then click **Renew Contracts**.	• Salesforce CPQ asks you to pick a master contract. The renewal quote inherits its end date from the master contract's end date. • Salesforce CPQ creates a renewal opportunity and renewal quote. • The renewal quote contains products for all the subscriptions and covered assets from the contracts you renewed.
Asset-based	You have a percent of total asset that represents a subscription and at least one covered asset.	To renew assets, click **Renew Assets** on your account.	• Salesforce CPQ creates a renewal opportunity and renewal quote. • The renewal quote contains your percent of total asset product and all the asset products it covered. • The covered products on the renewal quote have a net total price of $0 to show that your customers paid for them.

Renewal Field Guidelines
Salesforce CPQ provides several fields that let you automate and customize the renewal process. You can find these fields on your account, contract, and subscription records.

Renew from the Contract Record
Renew one of your contracts directly from the contract record. This process is useful if you don't need to renew several contracts into the same renewal quote.

Renew Contracts from an Account
Renew two or more contracts at the same time from your account. Renewing multiple contracts from an account is useful if you want all the subscriptions and assets from these contracts to go to one renewal opportunity.

Guidelines for Renewing a Contract with Multiple Subscription End Dates
If your contract contains subscriptions with different end dates, you can control how Salesforce CPQ sets the start and end dates of your renewal quotes. This feature is useful if you don't want an amendment quote to coterminate with the original contract.

Renew Assets in Asset-Based Accounts

If you're using asset-based renewals, you can renew from your account assets that are covered by a percent of total product.

Use a Single Renewal Quote for All of an Account's Subscriptions

Keep all your customer's renewed subscriptions on a single quote and contract. This makes it easier to manage renewals and align them to end on the same date.

Combine Subscriptions on Renewal Quotes

Configure your contract to combine subscriptions for the same product onto a single renewal quote line, as long as the subscriptions have matching end dates.

Guidelines for Renewed Products

A product's type determines how it moves through the renewal process. Use key renewal fields on your product records to customize this process.

Renewal Field Guidelines

Salesforce CPQ provides several fields that let you automate and customize the renewal process. You can find these fields on your account, contract, and subscription records.

EDITIONS

Available in: **All** Salesforce CPQ Editions

Account Fields

Renewal Pricing Method

- Same: Subscription product quote lines on this account's renewal quotes inherit their prices from the related subscription records on the contract you're renewing.
- List: Subscription product quote lines on this renewal quote use their product's list price as defined in your price book.
- Uplift: Subscription product quote lines on this renewal quote inherit their subscription record's price and update it based on the subscription record's Renewal Uplift (%) field.

Combine Asset Quantities

Combine multiple asset records for the same product into one quote line on your renewal quote. If you contracted a quote containing assets with one-per-unit asset conversion, you have several asset records for the same product.

Combine Co-Termed Contracts

Combine multiple asset or subscription records for the same product across several contracts into one quote line on the renewal quote. If your contracts end on the same date, you can use this feature. If you don't select this field, each set of matching products receives its own quote line group on the renewal quote. You can use this field when you renew multiple contracts at the same time from the account record.

Preserve Bundle Structure

Bundles on the renewal quote appear as you last configured them on the quote you're renewing. If you don't select this field, your bundles appear on the renewal quote as if you added them to the quote for the first time.

Contract Fields

Renewal Term

Set the term of renewal quotes made from this contract. By default, this value matches the contract's term. For example, let's say you have a contract with a start date of 12/01/17 and an end date of 11/30/18 in an org that uses monthly subscription term units. Your renewal term by default is 12. If you want your renewal quotes to run for six months instead, you give this field a value of 6.

Renewal Uplift

Define an uplift percentage to apply to your contract records if your account has an uplift-based renewal pricing method. All subscription record on the contract inherit this value unless they have a different value defined in their own Renewal Uplift field. For MDQ products, the uplift value applies to all segments on the contract that don't already have a renewal uplift percentage specified.

Subscription Fields

Renewal Quantity

Define the quantity of subscription products that appear on the renewal quote when you renew this subscription. For example, if you set this field to 4, Salesforce CPQ creates a quote line with a quantity of 4. This field defaults to 1.

Renewal Uplift

Define an uplift percentage to apply to your renewed subscription product quote lines if your account has an uplift-based renewal pricing method.

Renewal Price

Define the price of quote lines that appear on the renewal quote when you renew this subscription. This field overrides the result of price calculations from your account's renewal pricing method.

Renew from the Contract Record

EDITIONS

Available in: **All** Salesforce CPQ Editions

Renew one of your contracts directly from the contract record. This process is useful if you don't need to renew several contracts into the same renewal quote.

1. Make sure that your account has a contract-based renewal model.
2. Click **Renewal Forecast** on your contract, and then save your changes.
   Salesforce CPQ creates a renewal opportunity on your account. The renewal opportunity contains opportunity products for all the subscriptions on your original quote. It has a close date equal to your contract's end date.
3. Click **Renewal Quoted** on your contract.
   Salesforce CPQ creates a renewal quote and associates it with the renewal opportunity. The renewal quote starts one day after the renewal opportunity's close date and has an end date based on your contract's renewal term. It contains all the subscription products and subscribed assets from the quote you renewed.

Example: You have a contract that runs from 01/01/2018 through 12/31/2018, with a renewal term of 12. The contract contains the following subscriptions.

Subscription	Start Date	End Date
Cloud Storage	01/01/2018	12/31/2018
Data Security	01/01/2018	12/31/2018
Server Management	05/01/2018	12/31/2018

When you made your quote, your customer decided not to start your server management coverage until May. However, they now want to renew all three subscriptions for a full year of service.

When you click **Renewal Quoted**, Salesforce CPQ creates a renewal opportunity with a close date of 12/31/2018. Your renewal quote has a start date of 01/01/2019. Because your contract had a renewal term of 12 months, your renewal quote has an end date of 12/31/2019.

You can also skip clicking **Renewal Forecast** and click **Renewal Quoted** to create your renewal opportunity and renewal quote at the same time. However, we recommend using Renewal Forecast so you can track pipeline opportunities for record-keeping purposes before finalizing the renewal quote.

Your renewal opportunity's Renewal Contracts related list also contains a lookup to the contract or contracts that initiated the renewal.

Renew Contracts from an Account

Renew two or more contracts at the same time from your account. Renewing multiple contracts from an account is useful if you want all the subscriptions and assets from these contracts to go to one renewal opportunity.

EDITIONS

Available in: **All** Salesforce CPQ Versions

When you renew several contracts, Salesforce CPQ requires that one contract acts as the master contract. Your renewal opportunity inherits its close date from the master contract's end date. This process also means that your renewal quote has a start date set one day after your master contract's end date.

We recommend that the contract with the earliest end date becomes your master contract. This process ensures that you don't have gaps in subscription between a contract with an early end date and a contract with a later end date.

1. Make sure that your account has a contract-based renewal model.
2. In an account with multiple active contracts, in the Contracts related list, select the checkboxes of the contracts to renew. Salesforce CPQ shows the Renew Contracts page.
3. Click **Renew Contracts**.
4. Choose a contract to serve as the master contract. Your renewal opportunity inherits its end date from the master contract's end date.
5. Save your changes.
   Salesforce CPQ creates the following records.
   - A renewal opportunity with a close date equal to your master contract's end date.
   - A renewal quote with a start date set one day after your renewal opportunity's close date. The renewal quote bases its end date off the master contract's renewal term.
   - The renewal quote contains all the renewable products from all the contracts you renewed.

Example: You have 4 contracts on your account. Each contract contains a subscription that you sold at a different date during the year.

Contract	Start date	End date	Renewal term	Subscription
Contract 1	03/01/2018	12/31/2018	10	Mobile Device Management
Contract 2	03/06/18	09/05/18	6	Service Desk Management
Contract 3	04/29/18	11/28/18	7	System Performance Management
Contract 4	07/01/18	12/31/18	6	Release & Deployment Management

Your customer decides to renew the first three subscriptions for a full year of service. Because Contract 2 ends the earliest, you set it as your master contract.

1. Change the renewal term of Contract 2 to 12.
2. Select all 3 contracts on your account, and then click **Renew Contracts**.
3. Choose Contract 2 as your master contract. Salesforce CPQ creates a renewal opportunity with a close date of 09/05/2018 and the following renewal quote.

Start Date
09/06/2018

End Date
09/05/2019

Quote Lines
Mobile Device Management

Service Desk Management

System Performance Management

Your renewal quote's quote lines have the following information.

Quote lines on your renewal quote	Start Date	End Date
Mobile Device Management	01/01/2019	09/05/2019
Service Desk Management	09/06/2018	09/05/2019
System Performance Management	11/29/2018	09/05/2019

Guidelines for Renewing a Contract with Multiple Subscription End Dates

If your contract contains subscriptions with different end dates, you can control how Salesforce CPQ sets the start and end dates of your renewal quotes. This feature is useful if you don't want an amendment quote to coterminate with the original contract.

EDITIONS

Available in: Salesforce CPQ Summer '16 and later

When you renew your contract, Salesforce CPQ evaluates the contract field Amendment and Renewal Behavior to set the start and end dates of the contract's renewal quotes. The value of Amendment and Renewal Behavior affects the start date on renewal quotes made from your contract.

- Latest End Date: Renewal quotes on this contract set their start dates to one day after the latest end date among all the contract's subscriptions.
- Earliest End Date: Renewal quotes on this contract set their start dates to one day after the earliest end date among all the contract's subscriptions.

Important: The Amendment and Renewal Behavior field affects the start date of only your renewal quote record. It doesn't determine a value for any of the renewal quote's lines. By default, renewal quote lines set their start dates to one day after their parent subscription's end date. If the renewal quote's start date and the day after the subscription's end date are the same value, the quote line has a null start date instead.

Example: You have a quote with a start date of 01/01/2018, an end date of 12/31/2018, and several subscription products. You contract the quote to create the following subscriptions.

Table 48: Contract

Subscription	Start Date	End Date
Bronze Maintenance	1/1/2018	12/31/2018
Silver Maintenance	2/1/2018	8/31/2018
Gold Maintenance	5/1/2018	12/01/2018

When you're ready to renew this quote, you have a few options based on the value of Amendment and Renewal Behavior.

If your amendment and renewal behavior is the latest end date, your renewal quote has a start date of 01/01/2019 and an end date of 12/31/2019.

If your amendment and renewal behavior follows the earliest end date, your renewal quote has a start date of 09/01/2018 and an end date of 08/31/2019.

Renew Assets in Asset-Based Accounts

If you're using asset-based renewals, you can renew from your account assets that are covered by a percent of total product.

The assets on renewal quote receive a net total price of zero to show that your customer paid for them. Your percent of total product uses the list price of your covered assets to calculate the cost of another year of coverage.

EDITIONS

Available in: Salesforce CPQ Summer '15 and later

1. Go to an account with an asset-based renewal method and click **Renew Assets**.
   The Asset Selection page lists the assets on this account that are covered by a percent of total product.
2. Select the assets you want to renew, and then click **Renew**.
   Salesforce CPQ creates a renewal quote, associates it with a renewal opportunity, and opens the quote line editor.
3. Edit the quantities of the assets from your original quote as needed. You can also add new products. Remember to save your changes.
   Salesforce CPQ updates your renewal opportunity to reflect the assets you added or removed on your renewal quote.

Example: You're working with an asset-based account and sold a quote that contained five software licenses. The licenses are covered by a percent of total IT maintenance product. The percent of total maintenance product has a price that's 10% of its covered assets.

Table 49: Quote

Product	Quantity	List Price	Net Total
Software License	5	$200	$1,000
Percent of Total Maintenance	1	$0	$100

Your customer decides to renew their licenses and maintenance coverage after 1 year. In this case, you click **Renew Assets** on your account and choose all five of your licenses for renewal. Your renewal quote looks like this example.

Table 50: Renewal Quote

Product	Quantity	List Price	Net Total
Software License	5	$20	$0
Percent of Total Maintenance	1	$0	$100

Use a Single Renewal Quote for All of an Account's Subscriptions

Keep all your customer's renewed subscriptions on a single quote and contract. This makes it easier to manage renewals and align them to end on the same date.

EDITIONS

Available in: All Salesforce CPQ Editions

1. Go to an account.
2. Click **New Opportunity**.
3. Enter the opportunity details. Select the Renewal option, and then save the opportunity.
4. From the new opportunity, click **New Quote**.
5. Enter the quote details. Set the Type field to Renewal, and then save the quote.
   The quote line editor opens automatically.
6. In the quote line editor, select **Renew Subscriptions**from the Add Products dropdown list.
7. On the Subscription Selection page, choose the subscriptions you want to renew, and then click **Select**.
   Salesforce CPQ creates a renewal quote containing all the subscriptions you selected.

Combine Subscriptions on Renewal Quotes

Configure your contract to combine subscriptions for the same product onto a single renewal quote line, as long as the subscriptions have matching end dates.

EDITIONS

Available in: Salesforce CPQ Summer '15 and later

1. Add the Combine Subscription Quantities field to your contract page layout.
2. Create an add-on opportunity on your account.
3. On the Existing Contracts page, select the contract that you want your add-on opportunity to coterminate with.
4. Create a quote for your add-on opportunity and add at least one of a subscription product that exists on the contract you picked for cotermination.
5. On your add-on opportunity, click **Contracted**.
6. Return to your contract and select Combine Subscription Quantities.
7. Select Renewal Forecast and Renewal Quoted.
8. Find your renewal opportunity and open its quote.
   Salesforce CPQ combined subscriptions with matching end dates for the same product into one quote line. For example, if your contract contained 8 MDM subscriptions and your add-on opportunity contained 2 MDM subscriptions, the renewal quote contains one MDM subscription quote line with a quantity of 10.

When you're combining matching subscriptions, consider the following guidelines.

- Subscriptions don't roll up on amendment quotes, even when you've selected the contract's Combine Subscription Quantities field.

- Salesforce CPQ doesn't preserve bundle structure when Combine Subscription Quantities is active and the same subscription product exists within multiple bundle levels.

Guidelines for Renewed Products

A product's type determines how it moves through the renewal process. Use key renewal fields on your product records to customize this process.

EDITIONS

Available in: **All** Salesforce CPQ editions

Renewing Your Percent of Total Products

When you renew a contract, your original quote's percent of total subscriptions continue to cover their asset quote lines. Your original quote's percent of total subscriptions can also cover products that were added in only the renewal quote.

EDITIONS

Available in: **All** CPQ Editions

For example, let's say you renewed a contract containing four mobile device management licenses and a tech support subscription. The tech support subscription is a percent of total product that covers the software licenses on your quote. On your renewal quote, your subscription continues covering the licenses. The renewal subscription still covers the licenses even if you changed a field on the license product records that would exclude them from the subscription's scope on the renewal quote. For example, your renewal subscription would still cover your licenses if they had an active Exclude from Percent of Total field.

By default, that subscription doesn't consider in its scope any new software licenses that you add on the renewal quote. You can change this process by selecting **Include Net-new Products in Maintenance** in your Subscriptions and Amendments package settings. While this setting is active, your percent of total product also considers any products added on the renewal quote that still fall under their scope. In this example, let's say you added to the renewal quote a system performance management license that falls under the subscription's scope. Your subscription would cover the four mobile device management license and the system performance management license.

Important: You can't reduce the quantity of subscribed assets on a renewal quote. Use amendments to reduce the quantity of your subscribed assets or assets instead.

Guidelines for Bundle Renewals

You can change the configuration of your bundle when you renew it.

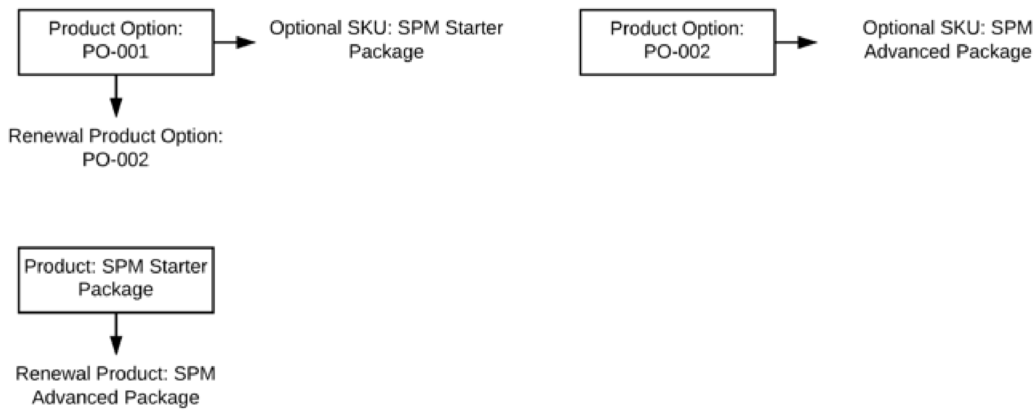
EDITIONS

Available in: **All** CPQ Editions

Renewing Product Options

To replace a product option upon renewal, you'll have to define a replacement for both the product option record and the product that it references through its optional SKU. The product option field Renewal Product Option looks up to your replacement product option. The product's Renewal Product field looks up to the replacement product. Your replacement product option's optional SKU and your product's Renewal Product field must look up to the same product. For example, let's say your company sells a bundle with various SaaS licenses. When a customer renews the bundle, you want Salesforce CPQ to replace your SPM Basic Package product option with a product option for your SPM Advanced Package. Here's how you can set this up.

Important: Make sure that you always use renewal product option when renewing a product that's part of a bundle. Otherwise, Salesforce CPQ changes only the product upon renewal, which may cause errors when you reconfigure your renewed bundle.



Re-Evaluate Bundle Logic on Renewals

Select the Subscriptions and Renewals package setting Re-evaluate Bundle Logic on Renewal to automatically reconfigure a bundle upon renewal. Renewing a bundle while this setting is active runs all configuration rules and automatically adds all required products. This setting provides the same features as a user manually finding the renewal quote, reconfiguring the bundle, and then saving it.

Re-evaluate Bundle Logic on Renewal is disabled by default. You can leave it disabled when you renew a quote where the renewal bundle's configuration has changed, because the new bundle has different configuration logic. Enabling the setting causes new options to automatically add to the bundle, which prevents you from manually reconfiguring the bundle as needed.

Renewing MDQ Products

EDITIONS

Available in: **All** CPQ Editions

Renew your MDQ products so you can quote a new set of segments on your renewal quote.

MDQ products renew the same way as standard products renew. You also have a few other options.

- You can desegment an MDQ product into a standard quote line on the renewal quote. Enable this feature by setting your contract's MDQ Renewal Behavior field to De-segmented. When you renew that contract, all the contract's segmented MDQ products convert to a single quote line on their renewal quotes. Salesforce CPQ uses pricing information from the last segment to calculate pricing on the renewed desegmented quote line. Change the renewal price manually only if you want to override this default behavior.
- The subscription of the first segment represents the entire contract term from start date to end date. When you renew an MDQ product, the renewal product inherits its renewal price from the first segment's subscription record. You can renew at a different price by using price rules or changing your account's renewal price method. You can also renew at a different price updating the renewal price on the first segment's subscription record.
- You can assign a renewal uplift to the first segment of a subscription MDQ product. Set your MDQ product's renewal pricing method to Uplift and update the corresponding subscription record's Renewal Uplift % field with the value that you need.
- You can assign a renewal uplift to all quote lines on the contract. For MDQ products, either the first segment is uplifted for all segments are uplifted. When the renewal uplift applies to all the segments on the renewal contract, the price increases over the term of the quote.

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