Salesforce CPQ

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Manage Your Quotes with Salesforce CPQ

Use Salesforce CPQ to create, manage, and send your quotes. (Salesforce CPQ Managed Package)

Available in: All CPQ Editions

Important:

The Salesforce CPQ managed package continues to be available for existing customers, however, there is no longer any new feature development. We will continue to provide support and services for the duration of your contract. You can also add more user licenses to your Salesforce org during your current subscription term and renew existing subscriptions.

For a more comprehensive and robust CPQ solution, we recommend exploring Revenue Cloud.

- Salesforce CPQ Patch Notes

Salesforce CPQ patch notes contain high-level reviews of bug fixes included in each generally available patch for a CPQ package. We update patch notes after a new patch becomes available for a package. (Salesforce CPQ Managed Package)

- Getting Started with Salesforce CPQ

Review important CPQ concepts and learn how to set up Salesforce CPQ. (Salesforce CPQ Managed Package)

- Manage Products in Salesforce CPQ

Build and optimize your product catalog to accelerate your quote-to-cash cycle. (Salesforce CPQ Managed Package)

- Create and Edit Salesforce CPQ Quotes

Create a quote for your customers. After you add products to your quote, you can adjust their quantities, configuration, and pricing. (Salesforce CPQ Managed Package)

- Send Your Salesforce 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. (Salesforce CPQ Managed Package)

- Advanced Approvals for Salesforce CPQ (Managed Package)

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. (Salesforce CPQ Managed Package)

- Manage Your Salesforce 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. (Salesforce CPQ Managed Package)

- Manage Your Subscriptions and Assets in Salesforce CPQ

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 opportunities and orders. (Salesforce CPQ Managed Package)

- Amend Your Contracts and Assets in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Renew Your Contracts and Assets in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Printable Tip Sheets & User Guides — For Salesforce CPQ

Printable implementation guides for Salesforce Billing admins. (Salesforce CPQ Managed Package)

Salesforce CPQ Patch Notes

Salesforce CPQ patch notes contain high-level reviews of bug fixes included in each generally available patch for a CPQ package. We update patch notes after a new patch becomes available for a package. (Salesforce CPQ Managed Package)

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For a more comprehensive and robust CPQ solution, we recommend exploring Revenue Cloud.

- Salesforce CPQ Summer '23 Patch Notes
- Salesforce CPQ Spring '23 Patch Notes
- Salesforce CPQ Winter '23 Patch Notes
- Salesforce CPQ Summer '22 Patch Notes
- Salesforce CPQ Spring '22 Patch Notes
- Salesforce CPQ Winter '22 Patch Notes
- Salesforce CPQ Summer '21 Patch Notes
- Salesforce CPQ Spring '21 Patch Notes
- Salesforce CPQ Winter '21 Patch Notes
- Salesforce CPQ Summer '20 Patch Notes
- Salesforce CPQ Spring '20 Patch Notes
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- Salesforce CPQ Spring '19 Patch Notes
- Salesforce CPQ Winter '19 Patch Notes

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- Salesforce CPQ Summer ’17 Patch Notes
- Salesforce CPQ Spring ’17 Patch Notes
- Salesforce CPQ Winter ’17 Patch Notes
- Salesforce CPQ Summer ’16 Patch Notes
- Salesforce CPQ Spring ’16 Patch Notes
- Salesforce CPQ Winter ’16 Patch Notes

Getting Started with Salesforce CPQ

Review important CPQ concepts and learn how to set up Salesforce CPQ. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Important:

The Salesforce CPQ managed package continues to be available for existing customers, however, there is no longer any new feature development. We will continue to provide support and services for the duration of your contract. You can also add more user licenses to your Salesforce org during your current subscription term and renew existing subscriptions.

For a more comprehensive and robust CPQ solution, we recommend exploring Revenue Cloud.

- Salesforce CPQ Installation

Manage the setup and installation of Salesforce CPQ. (Salesforce CPQ Managed Package)

- Get Started with Salesforce CPQ Permissions

Salesforce CPQ ships with package-specific permission sets that you can assign to users based on their roles. (Salesforce CPQ Managed Package)

- Salesforce CPQ-Supported Languages

Salesforce CPQ supports English, Spanish (Mexican), French, German, Japanese, and Brazilian Portuguese. You can change the Salesforce language by editing company settings, but Salesforce CPQ-specific values are translated only for the six CPQ languages. (Salesforce CPQ Managed Package)

- View Salesforce CPQ Validations

Salesforce CPQ ships with package-specific validation rules on CPQ objects. Review validation rules to understand how CPQ objects interact with other objects and features within the package. (Salesforce CPQ Managed Package)

- Guidelines for Setting Up Salesforce CPQ

Once you've installed your CPQ package, review some common objects and features. (Salesforce CPQ Managed Package)

- Mapping of Custom Salesforce CPQ Fields Between Objects

Certain pairs of CPQ objects pass custom field values from the first object to the second object when the second object is created. The values pass if the custom fields are editable, have matching field types, and have matching API names. We call these field pairs "twin fields." (Salesforce CPQ Managed Package)

- Guidelines for Using Salesforce CPQ in Multicurrency Orgs

Review important guidelines for working with Salesforce CPQ with multicurrency enabled. (Salesforce CPQ Managed Package)

- OmniStudio and OmniStudio Document Generation with Salesforce CPQ+

With OmniStudio Document Generation, create complex documents such as quotes quickly, accurately, and consistently. With OmniStudio FlexCards, DataRaptor, and other OmniStudio features, create guided interactions and other rich user experiences without code. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Legacy Data Upload for Salesforce CPQ

Transform legacy data into CPQ objects to support renewals and amendments in a new or existing Salesforce CPQ implementation. Export your data and create a data import spreadsheet. In addition to legacy data migration, users often manually create on-demand records in the system. Migrated records with incorrect or missing CPQ data causes errors when renewing and amending contracts. You don't realize there's a problem until you begin to amend or renew a contract, so get that data imported correctly. Use the following guidelines for each object type to ensure that your data shape is accurate and formatted correctly, so the Salesforce Data Loader processes your imports successfully. (Salesforce CPQ Managed Package)

- Contracts Object Fields for Legacy Data Upload

Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the contracts object. (Salesforce CPQ Managed Package)

- Subscriptions Object Fields for Legacy Data Upload

Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the subscriptions object. (Salesforce CPQ Managed Package)

- Assets Object Fields for Legacy Data Upload

Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the assets object. (Salesforce CPQ Managed Package)

- Override Default Salesforce 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. (Salesforce CPQ Managed Package)

- Adding a Parameter to Lookup Field Searches

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. (Salesforce CPQ Managed Package)

- Translating Salesforce CPQ Records

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. (Salesforce CPQ Managed Package)

- Salesforce CPQ for Experience Builder Sites

Salesforce CPQ and Salesforce partners 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 site, allowing their own customers to self-service when they need to work on contracts or quotes. (Salesforce CPQ Managed Package)

- Salesforce CPQ Object Relationships

Review field lookup and master-detail relationships for CPQ objects. (Salesforce CPQ Managed Package)

- Salesforce CPQ Object and Term Glossary

When you're working with Salesforce CPQ, review important terms and definitions. (Salesforce CPQ Managed Package)

- Salesforce CPQ Account Fields

Salesforce CPQ provides various custom managed fields for the account object. (Salesforce CPQ Managed Package)

- Salesforce CPQ Page Layouts

Keep your CPQ records accurate and organized with these recommended page layouts. (Salesforce CPQ Managed Package)

- Salesforce CPQ Package Settings

Salesforce CPQ package settings control the properties of feature areas within Salesforce CPQ. (Salesforce CPQ Managed Package)

- Protect Your Data with Salesforce Shield

Salesforce Shield is a set of security tools that helps you comply with regulations on storing sensitive information. With Shield Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality. (Salesforce CPQ Managed Package)

- Salesforce CPQ: What's Different or Not Available in the Salesforce Mobile App

Not every Salesforce CPQ feature is in the Salesforce mobile app. Learn about the differences between desktop and mobile experiences in Salesforce CPQ. Additionally, the Salesforce mobile app uses your

Salesforce CPQ edition and your user profile and permission sets to determine the features you can access. (Salesforce CPQ Managed Package)

Salesforce CPQ Installation

Manage the setup and installation of Salesforce CPQ. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Important: As of November 1, 2020 (targeted date, subject to change), SFDC will no longer support legacy versions of the Salesforce CPQ managed package that are more than two releases behind the then-current generally available version of the managed package. For more information, see CPQ Legacy Version Retirement.

- Configure Salesforce Before Installing Salesforce CPQ

Before installing Salesforce CPQ, enable important settings in your Salesforce org. (Salesforce CPQ Managed Package)

- Install or Upgrade Salesforce CPQ

Install or upgrade Salesforce CPQ from your package installation link. (Salesforce CPQ Managed Package)

- Set Up Salesforce CPQ in Salesforce Professional Edition

Because Salesforce Professional Edition doesn't 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 Managed Package)

Configure Salesforce Before Installing Salesforce CPQ

Before installing Salesforce CPQ, enable important settings in your Salesforce org. (Salesforce CPQ Managed Package)

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 or Upgrade Salesforce CPQ

Install or upgrade Salesforce CPQ from your package installation link. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Important: As of November 1, 2020, SFDC no longer supports legacy versions of the Salesforce CPQ managed package more than two releases behind the then-current generally available version of the managed package. For more information, see CPQ Legacy Version Retirement.

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

1. From your installation link, click **Continue**. Installation links for Salesforce CPQ and other products can be found at Salesforce Quote-to-Cash.
2. Choose the security level to grant users upon installation, and then click **Install** (for new installations) or **Upgrade**.

   Your security level varies based on the types of permissions you want to grant to your users. For an overview of basic Salesforce permissions granted with each level, read the Custom Installation section of the Install a Package topic. If you choose **Install for Specific Profiles**, you must also set the Standard User profile to **Full Access**.

3. If you're installing Salesforce CPQ for the first time, a prompt appears asking you to approve access to third-party websites. Select the checkbox, and then click **Continue**.

   Salesforce sends you an email after your installation is finished.
4. After installation, if you installed 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**.

      When a user clicks Authorize New Calculation Service, Salesforce CPQ creates a token for the user. Salesforce CPQ uses the token and user combination to communicate with a Heroku service that manages asynchronous calculations using the Javascript Quote Calculator. If the calculation service hasn't been authorized, org admins will see an error during upgrade or installation of Salesforce CPQ.

      Due to this active user requirement, we recommend the user profile that authorizes the calculator is a non-human admin user. This way, you can avoid required maintenance and downtime if the admin user who authorized the calculator is later deactivated.

      The user profile that authorizes the calculator must have access to the CPQ quote and all related objects. They must also have access to objects updated by triggers, workflow rules, and process builders the quote and its related objects are created or updated. The user must also have Customize Application permission to access the menu to authorize the calculator.
5. Assign permission set licenses to your users.

If your post-install scripts initially fail, rerun them after installing the CPQ package. Post-install scripts aren't harmful to your org.

As of Winter '21, Salesforce CPQ manages user licensing with Permission Set Licenses instead of Managed Package Licenses. Fields and settings related to Managed Package Licenses in Salesforce CPQ have been deprecated. On the Installed Packages page, the Allowed Licenses and Expiration Date fields refer to managed packages. As a result of the deprecation, they now show "Unlimited" and "Doesn't Expire" respectively for Salesforce CPQ.

Related information
Assign a Permission Set License to a User

Set Up Salesforce CPQ in Salesforce Professional Edition
Because Salesforce Professional Edition doesn't 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 Managed Package)

Available in: All Salesforce CPQ Editions

To use Visualforce pages in any edition of Salesforce CPQ, assign the API Enabled user permission to the necessary user profiles. See API Usage.

Note: API Access Control, which manages access to your Salesforce APIs, is incompatible with Salesforce CPQ. If your organization wants to use API Access Control, we recommend exploring Agentforce Revenue Management for a more comprehensive and robust CPQ solution.

You can’t install Salesforce CPQ Winter ’21 and later directly on a Salesforce Professional Edition org. Install Salesforce CPQ Summer ’20, then upgrade your package to the version you want.

1. Add the fields that you want users to see on the page layouts for your objects. If a field isn’t on the page layout, it’s hidden from users everywhere in Salesforce and Salesforce CPQ. Included are 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 these 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.

Get Started with Salesforce CPQ Permissions

Salesforce CPQ ships with package-specific permission sets that you can assign to users based on their roles. (Salesforce CPQ Managed Package)

Salesforce CPQ Permission Sets

Review the different types of Salesforce CPQ permission sets. (Salesforce CPQ Managed Package)

Salesforce CPQ permission sets are organized by four user types.

User Type	Description	Permission Sets
Admin	For users who configure Salesforce CPQ features and settings for end users.	• Salesforce CPQ Admin User • Salesforce CPQ Admin User Access
User	For users who use Salesforce CPQ features to deliver services to a customer or end user.	• Salesforce CPQ User • Salesforce CPQ User Access
Partner	For partners who implement Salesforce CPQ as part of their own product offering.	• Salesforce CPQ Partner User • Salesforce CPQ Partner User Access
Customer	For customers and end users who use Salesforce CPQ services.	• Salesforce CPQ Customer User • Salesforce CPQ Customer User Access

Note: API Access Control, which manages access to your Salesforce APIs, is incompatible with Salesforce CPQ. If your organization wants to use API Access Control, we recommend exploring Agentforce Revenue Management for a more comprehensive and robust CPQ solution.

Default CPQ Permission Sets

Default permission sets consist of the Salesforce CPQ Admin User, Salesforce CPQ User, Salesforce CPQ Partner User, and Salesforce CPQ Customer User sets. We created them based on the types of permissions that help users in each role perform their tasks in Salesforce CPQ. You can't edit them, but you can clone them and customize the cloned versions as needed.

When you upgrade to a new version of Salesforce CPQ, the default permission sets receive updated permissions for new or revised features in the release. However, sets cloned from the default permission sets don't receive updated permissions. If you're using cloned permission sets, review the Salesforce CPQ release notes to find new or revised permissions, then edit your cloned permission sets as needed. You can find revised permission information in the New Objects, Fields, and Permissions knowledge article included with each set of Salesforce CPQ and Billing release notes.

Access-type CPQ Permission Sets

Access permission sets were introduced in Salesforce CPQ Summer '21. They contain a small collection of permissions that are important for Salesforce CPQ data security. While most CPQ admins clone and then edit default permission sets for org users, we designed Access sets to be assigned directly to users without any cloning or editing. This way, your users will never risk missing important data security updates for new releases.

Data restrictions for the Access permission sets won't be enforced until Salesforce CPQ Spring '22. Before then, you have some options for testing them in your org. When the CPQ package setting Perform Enhanced Data Access Checks is active, Salesforce CPQ enforces data restrictions for the Access permission sets. When Perform Enhanced Data Checks is inactive, the Access permission set restrictions aren't enforced. Perform Enhanced Data Access Checks is available in the Additional Settings tab of CPQ package settings.

You can turn Perform Enhanced Data Access Checks on and off as needed before Spring '22. In Spring '22, we will be removing the Perform Enhanced Data Access Checks setting and enforcing data restrictions for the Access permission sets.

Order and Order Product Standard Permissions

As of Salesforce CPQ Spring '22, CPQ users who use orders and/or create contracts from orders require Read and Write access to standard (non-CPQ) order and order product fields.

Visualforce User Permission

To use Visualforce pages in any edition of Salesforce CPQ, assign the API Enabled user permission to the necessary user profiles. See API Usage.

Guidelines for Salesforce CPQ Permissions

Review tips and guidelines for Salesforce CPQ permissions, and look at topic links for more permission information about specific features. (Salesforce CPQ Managed Package)

- To modify CPQ objects and fields, users must have a CPQ license.

- To map one field to another, a user must have Edit permission on the initial field.
- In Salesforce CPQ Spring '19 and earlier, the Salesforce CPQ User permission set doesn't have Read, Create, Edit, or Delete permissions for CPQ objects. Salesforce CPQ can't enable access to these objects in that permission set owing to backward compatibility requirements with earlier package versions. If you use one of these versions, we recommend that you create and assign a separate permission set with Read and Write access to quote, quote line group, quote line item, quote template, and quote document objects.
- The QuoteLine Delete permission is required to delete quote lines in the quote line editor.

For information on object-specific Read, Create, Edit, and Delete permissions for Salesforce CPQ actions, review these topics. They're helpful if you want to clone and customize one of the default Salesforce CPQ permission sets.

- Contracting Permissions in Salesforce CPQ
- Order Permissions in Salesforce CPQ
- Pricing Permissions in Salesforce CPQ
- Product Configuration Permissions in Salesforce CPQ
- Quote Template Permissions in Salesforce CPQ

Salesforce CPQ-Supported Languages

Salesforce CPQ supports English, Spanish (Mexican), French, German, Japanese, and Brazilian Portuguese. You can change the Salesforce language by editing company settings, but Salesforce CPQ-specific values are translated only for the six CPQ languages. (Salesforce CPQ Managed Package)

View Salesforce CPQ Validations

Salesforce CPQ ships with package-specific validation rules on CPQ objects. Review validation rules to understand how CPQ objects interact with other objects and features within the package. (Salesforce CPQ Managed Package)

1. In Salesforce Lightning, from Setup, in the Quick Find box, enter `Object Manager`, and then select **Object Manager**. In Salesforce Classic, from Setup, in the Quick Find box, enter `Objects`, and then select **Object Manager**.
2. Select the CPQ object that you want to review, and then select **Validation Rules**.

Important: Editing or deactivating CPQ validation rules isn't supported.

Guidelines for Setting Up Salesforce CPQ

Once you've installed your CPQ package, review some common objects and features. (Salesforce CPQ Managed Package)

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.

General Tips

Salesforce CPQ doesn't inherit or integrate sales processes that were defined in Salesforce.

Related information

Install a Package

Mapping of Custom Salesforce CPQ Fields Between Objects

Certain pairs of CPQ objects pass custom field values from the first object to the second object when the second object is created. The values pass if the custom fields are editable, have matching field types, and have matching API names. We call these field pairs “twin fields.” (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Important:

- To map one field to another, you need Read access on the source field and Edit access on the target field.
- Standard fields can’t be mapped between objects.
- Remembering quote line twin field values for bundle parents or standalone products isn’t supported. However, if twin fields exist between the product and quote line, Salesforce CPQ copies the Product field value to the quote line when you add the favorite to a quote.
- Custom address fields aren’t supported for twin field mapping.

One-Way Mapping

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

Column 1	**Column 2**
Contract	Opportunities made from amending or renewing the contract
Service Contract	Opportunities made from amending or renewing the service contract
Opportunity Products	Quote Line Salesforce CPQ maps from opportunity products to quote lines only for standalone products and only when opportunity products have been created before a sales rep creates the opportunity’s first primary quote.
Product	Quote Line
Product Option	Quote Line If a product and product option both have the same field as a related quote line, the quote line field inherits the value of the product option field.
Quote	Order The quote’s Payment Terms field is an editable picklist field, while the order’s Payment Term field is restricted to a global picklist value set. If an admin adds a custom picklist value to the quote’s Payment Term field, and then a sales rep order the quote, Salesforce CPQ encounters an error.

Column 1	**Column 2**
Quote Line	Order Product
Quote Line	Opportunity Product Salesforce CPQ maps twin field values from the quote line to the opportunity product when the quote line is created and anytime that the quote line record is updated.
Quote Line	Subscription
Quote Line	Assets
Quote Line	Contract Line Item
Subscriptions	Quote Line On amendment quotes, quote lines inherit twin field values from the first subscription record, not any amended subscriptions made from that record.
Contract Line Item	Quote Line
Order Product	Invoice Line Salesforce Billing fields can't map a formula field that returns text to a text field.
Asset	Quote Line Salesforce CPQ maps from the asset back to the quote line only during amendment and renewal processes when quote lines are generated from assets.
Quote Line	Favorite Products for Child Products Standalone or parent products require a Configuration Attribute to retain a Quote Line field value.
Favorite Product	Quote Line Products added without a twin field on the Favorite Product but with a twin field from the Product will map the Product value to the Quote Line.

Mapping in the Configurator

When a bundle is configured, objects in Column 1 pass their custom field values to the resulting new quote lines. When you open the configurator to reconfigure the bundle, Salesforce CPQ sets product option and configuration attribute values based on matching field values from their related quote lines.

Column 1	Column 2
Configuration Attributes	Quote Line Configuration attributes always map to the bundle parent's quote line. They map to the bundle's child products only when the configuration attribute's Apply to Product Options field is enabled. Mapping occurs only for quote lines that are product options of the bundle containing the configuration attribute. Configuration attribute-to-quote line mapping includes quote line fields on segmented quote lines.
Product options	Quote Line

Guidelines for Using Salesforce CPQ in Multicurrency Orgs

Review important guidelines for working with Salesforce CPQ with multicurrency enabled. (Salesforce CPQ Managed Package)

- When you create an opportunity, the record defaults to the currency defined in their user profile. They can also edit the opportunity's Currency field.
- A primary quote must have the same currency as its parent opportunity.
- Pricebooks can contain multiple currencies. However, in order for a product to appear in the quote line editor's Product Selection page, the product must have a pricebook entry in the same pricebook and currency as the quote.
- When you create a primary quote from an opportunity, it inherits the opportunity's currency. Users can't change the currency of a quote that's related to an opportunity through the opportunity's Primary Quote field. Non-primary quotes default to the user's currency value upon creation.
- When you create a quote from an opportunity, it inherits the opportunity's currency. You can't change the currency of a quote that's related to an opportunity.
- Price books are required for all opportunities and quotes. When you create a quote from an opportunity, it inherits the opportunity's price book. Price books can hold prices for several currencies, but Salesforce CPQ shows prices only in the currency of the opportunity or quote on the Product Selection page.
- When you order a quote, the order inherits the quote's currency.
- When a product's price changes, or the currency conversion rate changes beyond an acceptable level for your customer, make sure that you update the product's price in the price book. You can also create a price book.
- Miscellaneous Product: Currency fields in Product Selection are displayed based on the raw field value, without applying currency Conversion Rate.

OmniStudio and OmniStudio Document Generation with Salesforce CPQ+

With OmniStudio Document Generation, create complex documents such as quotes quickly, accurately, and consistently. With OmniStudio FlexCards, DataRaptor, and other OmniStudio features, create guided interactions and other rich user experiences without code. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Winter ’24

Install the OmniStudio managed package to create applications and workflows with data from both Salesforce CPQ+ and external sources. To help keep your org up to date, choose to receive automatic push updates to the OmniStudio package.

Use these OmniStudio features with your Salesforce CPQ+ license.

OmniScripts	Design flexible, responsive interactions that give constituents a guided path for completing a business process.
Integration Procedures	Read and write data between Salesforce and external systems. Send emails, DocuSign envelopes, perform complex list processing, and use additional features.
FlexCards	Show contextual information in an at-a-glance format and provide access to relevant tasks to act on the data.
DataRaptors	Read, transform, and write Salesforce data.

Related concepts

OmniStudio Document Generation for Salesforce CPQ

The OmniStudio Document Generation license is available with Salesforce CPQ+. Install the OmniStudio Document Generation managed package to generate complex quotes quickly, accurately, and consistently. (Salesforce CPQ Managed Package)

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’16 and later

A favorite represents only a product or configured bundle. It doesn't contain pricing information from the quote where you created the favorite, such as discounts, markups, quantity changes, or custom field values.

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

- Save a Salesforce CPQ Favorite

Save a quote line or quote line group as a favorite. (Salesforce CPQ Managed Package)

- Add a Salesforce 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. (Salesforce CPQ Managed Package)

- Delete a Salesforce CPQ Favorite

Delete the favorite record for a quote line that you've saved as a favorite. (Salesforce CPQ Managed Package)

- Edit a Salesforce CPQ Favorite

Edit the name and description of a CPQ favorite record. (Salesforce CPQ Managed Package)

- Share a Salesforce CPQ Favorite

Share a CPQ favorite record with users and user groups. (Salesforce CPQ Managed Package)

Save a Salesforce CPQ Favorite

Save a quote line or quote line group as a favorite. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

1. In the quote line editor, click the star icon for the quote line or quote line group 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 line or group 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.
- Remembering quote line twin field values for bundle parents or standalone products isn't supported. However, if twin fields exist between the product and quote line, Salesforce CPQ copies the Product field value to the quote line when you add the favorite to a quote.
- When you add a favorite quote line group to a quote, Salesforce CPQ adds each of the group's lines but doesn't add the group itself.
- If you save a bundle as a favorite without any of its child products, you can't edit the favorite. To make a favorite editable, save at least one child products along with the bundle.

Add a Salesforce 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. (Salesforce CPQ Managed Package)

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.

   When you click **Add Favorites**, Salesforce CPQ runs quote-scoped product rules.
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.

   Note: If you add a favorite for a quote line group, Salesforce CPQ adds each line from the group, but doesn't add the group itself.

Delete a Salesforce CPQ Favorite
Delete the favorite record for a quote line that you've saved as a favorite. (Salesforce CPQ Managed Package)

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 Salesforce CPQ Favorite
Edit the name and description of a CPQ favorite record. (Salesforce CPQ Managed Package)

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 Salesforce CPQ Favorite
Share a CPQ favorite record with users and user groups. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

- If the Favorite object's default shared settings are private, users require the View All Records permission to share favorites.
- If an org has Experience Cloud site users who can't receive View All Records permissions on objects, they can share favorites only if their default external access is non-private.

1. From the quote line editor, click the down 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 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.

   Note: Favorites are shared with users and groups of Standard user type only. You can't share favorites with users in groups with the group member type All Internal Users or Roles and Internal Subordinates.
5. Click a user or group to add it to the list of people you're sharing with. You can add multiple users or groups to this list.
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '15 and later

- Define Import Formats

Create an import format record that provides the configuration for the importing process. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Define Import Formats

Create an import format record that provides the configuration for the importing process. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’15 and later

User Permissions Needed	
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’15 and later

Important:

- You can upload only standalone products, not product bundles.
- For Mac users, Salesforce CPQ supports importing lines from Excel saved only in the Comma Separated Values (.csv) or MS-DOS Comma Separated (.csv) formats.
- Salesforce CPQ may encounter errors when importing around 1,000 lines using the Import Lines button. The exact number will vary based on user org settings. To import large volumes of lines, we recommend using the Salesforce Data Loader or a batch loading tool.

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.

Legacy Data Upload for Salesforce CPQ

Transform legacy data into CPQ objects to support renewals and amendments in a new or existing Salesforce CPQ implementation. Export your data and create a data import spreadsheet. In addition to legacy data migration, users often manually create on-demand records in the system. Migrated records with incorrect or missing CPQ data causes errors when renewing and amending contracts. You don't realize there's a problem until you begin to amend or renew a contract, so get that data imported correctly. Use the following guidelines for each object type to ensure that your data shape is accurate and formatted correctly, so the Salesforce Data Loader processes your imports successfully. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ and Salesforce Billing Editions

Before you get started, note these requirements:

- Legacy upload is only available for contract-based renewal methods.
- See Salesforce CPQ has Removed Dependency on Quote Line Lookups for Assets and Subscriptions.
- You must populate several fields on your Contracts, Subscriptions, and Assets. Create your contract records first. Then, create all top-level bundle or standalone assets and subscriptions. Finally, create the children of those assets and subscriptions.
- All the subscribed assets of a percent of the total product require a populated Price field.
- Upload original subscriptions before you upload subscriptions intended to be the amendment subscriptions.

Related reference

Contracts Object Fields for Legacy Data Upload
Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the contracts object. (Salesforce CPQ Managed Package)

Subscriptions Object Fields for Legacy Data Upload

Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the subscriptions object. (Salesforce CPQ Managed Package)

Assets Object Fields for Legacy Data Upload
Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the assets object. (Salesforce CPQ Managed Package)

Contracts Object Fields for Legacy Data Upload

Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the contracts object. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ and Salesforce Billing Editions

Fields to Populate on the Contracts Object

Table 1: Contracts

Field API Name	Type	Description
AccountId	Lookup(Account)	Lookup to the contract's parent account.
StartDate	Date	Contract start date.
ContractTerm	Number(4,0)	Contract term in months. Leave the field blank for evergreen products.
Status	Picklist	Status of the contract. Contracts can't load as Activated. Update to Activated after the initial insert.
SBQQ__RenewalPricebookId__c	Text(18)	The 18-digit SF ID of the price book referenced during contract renewal. This field is optional.
SBQQ__AmendmentPricebookId__c	Text(18)	The 18-digit SF ID of the price book referenced during contract amendment. This field is optional.
SBQQ__RenewalTerm__c	Number	Renewal term of the contract in months. By default, this field matches the contract's term. If it's not populated, the contract renews for only 12 months.
SBQQ__AmendmentRenewalBehavior__c	Picklist	Latest End Date (CPQ default) or Earliest End Date. The basis for a Renewal Start Date and Amendment End Date is calculated based on the dates of the contract's subscriptions.

Table 2: Evergreen Contracts Additional Fields

Field API Name	Type	Description
SBQQ__Evergreen__c	Checkbox	Defines the contract as evergreen. Set to True if the contract is an evergreen contract.

Subscriptions Object Fields for Legacy Data Upload

Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the subscriptions object. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ and Salesforce Billing Editions

Fields to Populate on the Subscriptions Object

Table 3: Subscriptions

Field API Name	Type	Description
SBQQ__Account__c	Lookup(Account)	Lookup to the subscription's parent account. This relationship is used for volume discount calculations.
SBQQ__Contract__c	Lookup(Contract)	Lookup to the parent contract record. The contract that governs this subscription.
SBQQ__RootId__c	Text (18)	The 18-digit SF ID of a bundle parent's asset or subscription record. For bundles, the Root ID field on Subscriptions (SBQQ__RootID__c) must be populated with the 18-digit SF ID of the bundle parent's subscription or asset record. If RootID isn't populated, the bundle structure is lost or renewals and amendments fail during creation.
SBQQ__Product__c	Lookup(Product)	Lookup to the related product record.
SBQQ__Number__c	Number(5,0)	The field dictates the order the product is listed within its group or quote in the quote line editor. Any number can be used, but must be unique within the group or quote. Required if SBQQ__QuoteLine__c lookup isn't populated.
SBQQ__Quantity__c	Number(10,2)	The quantity of the subscription.
SBQQ__RenewalQuantity__c	Number(10,2)	The quantity of the subscription upon renewal, usually the same as SBQQ__Quantity__c.

Field API Name	Type	Description
SBQQ__PricingMethod__c	Picklist	The pricing method selected indicates how the price for the line item is calculated. List equals subtracting discount from list price. Cost equals adding markup to cost.
SBQQ__ListPrice__c	Currency(12,2)	Pricebook entry's unit price of the product sold.
SBQQ__CustomerPrice__c	Currency(12,2)	Unit price including any systematic and discretionary discounts.
SBQQ__NetPrice__c	Currency(12,2)	Unit price including any partner and distributor discounts.
SBQQ__ProrateMultiplier__c	Number(8,4)	Calculated ratio used to compute the prorated price. Contract term divisible by the product's default subscription term. The calculation depends on your Subscription Proration Settings.
SBQQ__RenewalPrice__c	Currency(12,2)	The non-prorated net unit price. This field is optional. 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. If your account uses Uplift renewal pricing, the uplift is applied directly to the Renewal Price field.
SBQQ__DiscountScheduleType__c	Picklist	The type of schedule that determines how a discount is calculated. Choices are Range or Slab. Required if the product has a discount schedule defined. The type must match the type from the discount schedule defined in the lookup.

Field API Name	Type	Description
SBQQ__DiscountSchedule__c	Lookup(Discount Schedule)	Required if the product has a discount schedule defined or is otherwise defined in a bundle, for example, a product option. Specifies discounts in terms of percent or amount are discounted off the product's price by using quantity purchased or term. Set quantity/term ranges in tiers of different discount percentages. The discount applies to the list price and the resulting total is stored in the regular price.
SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	Required if the product has a term discount schedule defined. The discount schedule for discounts is based on subscription terms. Used to show a breakdown of payments into separate groups for different terms with the discount reflected for the duration of the subscription. Leave Term Discount Level blank if you want discount schedules applied based on the term of each line item.
SBQQ__SubscriptionPricing__c	Picklist	The method for calculating the subscription price. Subscription products have two pricing types, controlled by the Subscription Pricing field. Fixed Price: The product gets its list price from a price book entry. Percent of Total: The product’s list price is a percentage of the quote, quote line group, or a bundle’s total price.
SBQQ__ProductSubscriptionType__c	Picklist	Set the value to the subscription type. This field is the value set on a product indicating whether the subscription type of the line is One-time, Renewable, or Evergreen.
SBQQ__SubscriptionType__c	Picklist	Same as ProductSubscriptionType, or a different value from product configuration. Indicates whether the subscription type of the line is One-time, Renewable, or Evergreen.

Field API Name	Type	Description
SBQQ__SubscriptionStartDate__c	Date	The start date of the subscription. This field is populated only when the quote line's start date and the contract's start date are the same. When the quote line's start date and the contract's start date are different, this field is blank.
SBQQ__SubscriptionEndDate__c	Date	The end date of the subscription. On the Subscription record, this field is populated with the quote line's end date if it doesn't match the contract. If the date matches the contract, this field is blank and looks up the contract for this date information. Leave this field blank for evergreen products.

Important: Amendments pull in the current list price. To retain an existing discount on an amendment quote, the additional discount percent off amount is taken from the subscription and applied. Expect the product price on the amendment quote to reflect the current list price, less the existing discounts from the subscription, when it's included with your data load.

Table 4: Top Level of a Subscription Bundle

Field API Name	Type	Description
SBQQ__Bundle__c	Checkbox	Required if the product is a parent to other products. Indicates that the product on the line item is bundled with another product in the quote or order.

Table 5: Subscription Bundle Children Additional Fields

Field API Name	Type	Description
SBQQ__OptionLevel__c	Number(5,0)	Indicates the nest level of this option: 1 for children of the parent product and 2 for grandchildren of the top-level bundle product. Applies only to lines generated from options.
SBQQ__BundledQuantity__c	Number(10,2)	The initial quantity of the option before it was multiplied by the parent's quantity. For items with calculated quantities, this field holds the original (user-entered) quantity.
SBQQ__ProductOption__c	Lookup(Product Option)	Lookup to the product option that joins the parent product reference to this subscription's product.

Field API Name	Type	Description
SBQQ__OptionType__c	Picklist	Indicates the option type from the related product options and determines how the quantity is calculated. Types are Component, Accessory, or Related Product. Option type must match the type of the referenced product option record.
SBQQ__RequiredByProduct__c	Lookup(Product)	The bundle parent's product record for the referenced product option.
SBQQ__ComponentSubscriptionScope__c	Picklist	This field overrides the subscription scope copied from the product and is set at the component level. Values are Package, Components, Package and Components, or Entire Hierarchy. If the child subscription is a percent of total priced product, this field must be populated to limit the percent of total scope to the bundle containing the product.
SBQQ__RequiredById__c	Text(18)	ID to the related parent product record in a bundle on the contract level (Subscription/Asset Id). Required for amendments.
SBQQ__DynamicOptionId__c	Text(18)	The Dynamic Option ID field contains a combination of the Feature ID and Product ID to identify the feature and product associated with the Dynamic Bundle. Required for dynamic bundles.

Table 6: Percent of Total Subscription Additional Fields

Field API Name	Type	Description
SBQQ__SubscriptionPricing__c	Picklist	Set the value to **Percent of Total**. This field is used for price calculation based on the value selected.
SBQQ__ProductSubscriptionType__c	Picklist	Set the value to **Renewable**, if the product is a renewable product. This field is the value set on a product that is copied over, indicating if the subscription type of the line is One-time, Renewable, or Evergreen.

Field API Name	Type	Description
SBQQ__SubscriptionType__c	Picklist	Same as ProductSubscriptionType, or a different value from product configuration. Indicates whether the subscription type of the line is One-time, Renewable, or Evergreen.

Note: Subscribed assets must be created if Percent of Total is included in your data load.

Table 7: MDQ Subscription Additional Fields

Field API Name	Type	Description
SBQQ__SegmentStartDate__c	Date	For multi-segmented products, the start date from the original segment's quote line.
SBQQ__SegmentEndDate__c	Date	For multi-segmented products, the end date from the original segment's associated quote line.
SBQQ__Dimension__c	Lookup	The 18-digit SF ID of the price dimension associated with this subscription.
SBQQ__SegmentIndex__c	Number	For multi-segmented products, the number represents the related quote line’s position in the segment table.
SBQQ__SegmentKey__c	Text	For multi-segmented products, a shared key is used to group multi-dimensional quote line items. Unique random number or characters for the MDQ product.
SBQQ__SegmentLabel__c	Text	Defines the column header label associated with the quote line, based on the type of price dimension. Value equals Type plus SegmentIndex. Select the value as follows for Month and the first segment - Month 1, then Month 2, and so on. For Quarter - Quarter 1, Quarter 2, and so on. For Year - Year 1, Year 2, and so on.
SBQQ__SegmentUplift__c	Percent	The uplift percentage from the original segment's line. This field is optional. Add lift percent or set to zero.

Field API Name	Type	Description
SBQQ__SegmentUpliftAmount__c	Currency	The uplift amount from the original segment's line. This field is optional. Add lift amount or set to zero.
SBQQ__SegmentQuantity__c	Number	For MDQ products, the quantity corresponds to the segment's original quote line quantity.

Table 8: Evergreen Subscription Additional Fields

Field API Name	Type	Description
SBQQ__ProductSubscriptionType__c	Picklist	Set the value to Evergreen. This field is the value set on a product that is copied over, indicating if the subscription type of the line is One-time, Renewable, or Evergreen.
SBQQ__SubscriptionType__c	Picklist	Set the value to Evergreen. Indicates whether the subscription type of the line is One-time, Renewable, or Evergreen.

Assets Object Fields for Legacy Data Upload

Create your Salesforce CPQ legacy data import file by defining and populating the fields required for the assets object. (Salesforce CPQ Managed Package)

Available in: All **Salesforce CPQ** and **Salesforce Billing** Editions

Fields to Populate on the Assets Object

Table 9: Assets

Field API Name	Type	Description
AccountId	Lookup(Account)	Lookup to the account that owns the subscription.
SBQQ__RootId__c	Text (18)	The 18-digit SF ID of bundle parent's asset record. Root Id must point to the top-most parent if the bundle is nested.
Product2Id	Lookup(Product)	Lookup to the product that the subscription represents.
SBQQ__Number__c	Number(5,0)	The field dictates the order the product is listed in the line editor. Any number can be used.
Quantity	Number(10,2)	The quantity of the asset.

Field API Name	Type	Description
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. See Product Pricing Methods.
SBQQ__ListPrice__c	Currency(12,2)	The list price for this asset. Pricebook entry's unit price of the product sold.
Price	Currency(12,2)	Unit price including any partner and distributor discounts.
SBQQ__DiscountScheduleType__c	Picklist	The type of schedule that determines how a discount is calculated. Choices are Range or Slab. Required if the product has a discount schedule defined. Type must match the type from the discount schedule defined in the lookup.
SBQQ__DiscountSchedule__c	Lookup(Discount Schedule)	Required if the product has a discount schedule defined or is otherwise defined in a bundle, for example a product option. Specifies discounts in terms of percent or amount discounted off the product's price by using quantity purchased or term. Set quantity/term ranges in tiers of different discount percentages. The discount applies to the list price and the resulting total is stored in the regular price.
SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	Required if the product has a term discount schedule defined. The discount schedule for discounts based on subscription terms. Used to show a breakdown of payments into separate groups for different terms with the discount reflected for the duration of the subscription. Leave Term Discount Level blank if you want discount schedules applied based on the term of each line item.

Field API Name	Type	Description
SBQQ__CombineKey__c	Text(18)	The combine key is used to tie one-per-unit assets together. The asset quantities are rolled together for amendments or renewals of all assets on an account with the same combine key value. Use combine keys if you're using one-per-unit product conversions. Set the combine key to LatestQuoteLine if LatestQuoteLine has a value. Otherwise, use QuoteLine. For data migration, the combine key is blank if there's one per Quote Line. Combine keys must have a unique value on the asset quantities that you want to be rolled together.
UsageEndDate	Date	CPQ uses this field to terminate an asset. Don't populate this field.

Important: Root Id must be null for records where Revised Asset lookup is populated when data loading an Original Asset and its revisions.

Table 10: Top Level of an Asset Bundle

Field API Name	Type	Description
SBQQ__Bundle__c	Checkbox	Required if the product is a parent to other products. Indicates that the product on the line item is bundled with another product in the quote or order.

Table 11: Asset Bundle Children Additional Fields

Field API Name	Type	Description
SBQQ__OptionLevel__c	Number(5,0)	Indicates nest level of this option: 1 for children of the parent product and 2 for grandchildren of the top-level bundle product (only applies to lines generated from options).
SBQQ__BundledQuantity__c	Number(10,2)	The initial quantity of the option before it was multiplied by the parent's quantity.
SBQQ__ProductOption__c	Lookup(Product Option)	Lookup to the product option that joins the parent product reference to this subscription's product.

Field API Name	Type	Description
SBQQ__OptionType__c	Picklist	Indicates the option type from the related product options and determines how the quantity is calculated. Option type must match the type of the referenced product option record.
SBQQ__RequiredByProduct__c	Lookup(Product)	The bundle parent's product record for the referenced product option.
SBQQ__RequiredByAsset__c	Text(18)	The 18-digit SF ID of the asset that's this asset's parent (Null if SBQQ__RequiredBySubscription__c is populated).
SBQQ__RequiredBySubscription__c	Text(18)	The 18-digit SF ID of the subscription that's this asset's parent (Null if SBQQ__RequiredByAsset__c is populated). If populated, this asset is a child in a bundle.
SBQQ__DynamicOptionId__c	?	Required for Dynamic Bundle. FeatureID:ProductID. This field contains the Feature ID and Product ID to identify the feature and optional SKU associated with this line.

Table 12: Subscribed Assets

Field API Name	Type	Description
SBQQ__Active__c	Boolean	Indicates whether the subscribed asset record is active or not. Set to True for assets still active for the account.
SBQQ__Asset__c	Lookup(Asset)	Lookup to the asset record related to this subscribed asset.
SBQQ__AssetRootId__c	Text(1300)	The 18-digit SF ID of the parent bundle asset or subscription record.
SBQQ__ContractId__c	Text(1300)	The 18-digit SF ID of the contract that generated this subscribed asset.
SBQQ__Subscription__c	Lookup(Subscription)	Lookup to the percent of total subscription record whose scope covers the related asset.

Override Default Salesforce 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. (Salesforce CPQ Managed Package)

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 primary 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

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '17 and later

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. The extra parameter search (on the lookup field) happens on the detailed search or on the details page and not by default. The default search (inline search) is always only on the Name 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

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

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. Salesforce CPQ translates values based off the User record's user locale. When Salesforce CPQ creates a quote document while translations are active, it evaluates the User record's user language instead to translate merge field values.
- 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

  Note:

  - If the org language and PDF document language are the same, Salesforce CPQ doesn't load translations on the PDF.
  - In the quote line editor, segmented line editor fields don't show overwritten label values from the Translation Workbench.
  - If a quote line field exists in multiple field sets under different objects, the translation workbench under both objects must be saved. For example, if the quote line (QL) field SBQQ__Optional__c is added to the layout via the QL Segmented Line Item Drawer field set and the quote line group's (QLG) Line Editor field set, Salesforce must override the labels for QL and QLG in the translation workbench.

- Localize a Salesforce CPQ Record

Define translations for text fields on certain types of CPQ objects. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Localize a Salesforce CPQ Record

Define translations for text fields on certain types of CPQ objects. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

You can define translated values for custom text, text area, long text area, and rich text area fields only on the Product Feature Name object.

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.

   Note: If the dynamic feature doesn't have a value specified for SBQQ__DynamicProductLookupFieldSet__c, the package defaults the Dynamic Option Lookup to the SBQQ__SearchResults field set. In this scenario, to see translated fields, add columns to the SBQQ__SearchResults field set under the Product field set.

   If the dynamic feature has the predefined value of ConfiguratorLookup set for SBQQ__DynamicProductLookupFieldSet__c, all fields in the Dynamic Option Lookup field set must be included in the Search Results field set under the Product field set for CPQ translations to work.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

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

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

Salesforce CPQ for Experience Builder Sites

Salesforce CPQ and Salesforce partners 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 site, allowing their own customers to self-service when they need to work on contracts or quotes. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’17 and later

You can configure Salesforce CPQ to enable your partners and customers to self-serve in a partner or customer site. All the business logic embedded into your CPQ application extends to the site 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 your customers 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 an Experience Builder Site and Enable Salesforce CPQ

Create an Experience Builder site and enable Salesforce CPQ within it. (Salesforce CPQ Managed Package)

- Allow Customer Site Users to Buy Net-New Products

Enable customers to purchase net new products and place new orders within a customer site. (Salesforce CPQ Managed Package)

- 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 site quote. (Salesforce CPQ Managed Package)

- Assign a Theme to New Customer Sites

Create a workflow rule that automatically assigns a theme to a new customer site. (Salesforce CPQ Managed Package)

Create an Experience Builder Site and Enable Salesforce CPQ

Create an Experience Builder site and enable Salesforce CPQ within it. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’17 and later

1. Create an Experience Builder site.
   a) From Setup, in the Quick Find box, enter `Digital Experiences`, and then click **All Sites**.
   b) Click **New**.
   c) Choose any Aura site template and follow the prompts, which take you to the Experience Builder.
      You can choose from any available Aura template or a Lightning Bolt that a Salesforce Partner created.

2. Enable Salesforce CPQ in your Experience Builder site.
   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 quotes.

Allow Customer Site Users to Buy Net-New Products
Enable customers to purchase net new products and place new orders within a customer site. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’17 and later

Note: CPQ customer site users don’t have access to opportunities or core quotes. If a CPQ quote references either object, the user can’t preview or generate a quote document.

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 Experience Builder, select Components, select Records, and 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 Experience Cloud site’s home page.

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 site quote. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’17 and later

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

```
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 Sites
Create a workflow rule that automatically assigns a theme to a new customer site. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’17 and later

1. Create a theme that you want to use for your customer site.
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

Salesforce CPQ Object Relationships

Review field lookup and master-detail relationships for CPQ objects. (Salesforce CPQ Managed Package)

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

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 • Quote Line	none
Discount Tier	SBQQ__DiscountTier__c	none	Discount Schedule

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
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
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 • Opportunity • User	none
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

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
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	none
Quote Document	SBQQ__QuoteDocument__c	Opportunity	Quote
Quote Line	SBQQ__QuoteLine__c	• Asset • Subscription • Discount Tier • Block Price • Cost • Contracted Price • Discount Schedule • Product Option • Product • Quote Line	Quote

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
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
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

Object	Element Name	Required Lookup Relationship	Required Master-Detail Relationship
Web Quote Line	SBQQ__WebQuoteLine__c	• Asset • Block Price • Contracted Price • Cost • Discount Schedule • Discount Tier • Subscription • Web Quote Line	Web Quote

Salesforce CPQ Object and Term Glossary

When you're working with Salesforce CPQ, review important terms and definitions. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Batch Quantity

This feature allows you to price products component or accessory product options 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. Salesforce CPQ divides the product option's quantity by its batch quantity and uses that value for the resulting quote line's quantity. For example, a $500 App License product option has a batch quantity of 4, and your sales rep enters a quantity of 8 for that product option in the configurator. The resulting quote line has a quantity of 2 and a net total of $1000.

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. The number of active quote product rules affects performance of the Edit Lines screen and should be limited to avoid Salesforce 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.
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 ines, 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, start date, or 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.

Salesforce CPQ Account Fields

Salesforce CPQ provides various custom managed fields for the account object. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Salesforce CPQ doesn't support accounts with billing states that have the same name but different state codes.

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. This field has been deprecated and is no longer supported.
Combine Co-Termed Contracts	SBQQ__CoTermedContractsCombined__c	Checkbox	Control how Salesforce CPQ renews co-terminated contracts when you don't have a master 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.

Field	API Name	Data Type	Definition
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.

Field	API Name	Data Type	Definition
Taxable	SBQQ__Taxable__c	Checkbox	Indicates whether products in record related to this account are taxable. By default, enabling this field doesn't perform any actions in Salesforce CPQ. For example, selecting this field doesn’t prevent the product from being added to quotes and orders for non-taxable accounts.However, Avalara for Salesforce CPQ evaluates the Taxable field when performing tax calculations.

Salesforce CPQ Page Layouts

Keep your CPQ records accurate and organized with these recommended page layouts. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

- Salesforce 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. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Salesforce CPQ Contract Page Layout

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

- Salesforce 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. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Sections

Table 13: Salesforce CPQ Information

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

Table 14: Address Information

Column 1	**Column 2**
Billing Address	Shipping Address

Table 15: Renewal / Co-Term Information

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

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

Salesforce 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. (Salesforce CPQ Managed Package)

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 16: 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

Salesforce CPQ Contract Page Layout
To keep your contract records accurate and organized, it helps if the page layout has fields grouped into sections and includes several related lists. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Sections

Table 17: Sales Contract Information

Column 1	**Column 2**
Liability Cap	Renewal Language

Column 1	**Column 2**
Governing Law	SLA
Contract Start Date	Contract End Date
Contract Term (months)	Renewal Uplift (%)
Company Signed By	Customer Signed Title
Customer Signed Date	

Table 18: 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 19: 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 20: 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	

Salesforce 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. (Salesforce CPQ Managed Package)

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 21: Opportunity Information

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

Table 22: Salesforce CPQ Configuration

Column 1	**Column 2**
Expected Revenue	Amount

Table 23: Salesforce CPQ Configuration

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

Table 24: Salesforce CPQ Information

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

Table 25: Approval Information

Column 1	**Column 2**
Approval Status	Discount %

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

Related Lists

The titles represent the related list names, while the lists 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

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Sections

Table 26: 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 27: 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 28: 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 29: 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

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Sections

Table 30: Salesforce CPQ Information

Column 1	**Column 2**
Option Name	Configured SKU
Number	Optional SKU

Column 1	Column 2
Quantity	Feature
Quantity Editable	Type
Selected	Bundled
Required	Unit Price
Min Quantity	Discount (%)
Max Quantity	Discount (Amt)
Discount Schedule	

Table 31: Optional SKU Information

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

Table 32: 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	

Salesforce 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. (Salesforce CPQ Managed Package)

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 33: 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 34: 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 35: Partner Information

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

Table 36: 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

Column 1	Column 2
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 37: 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 38: Approval Information

Column 1	Column 2
Approval Level	Approval Needed From:

Table 39: 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 40: 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

Column 1	Column 2
Resource Location	Order By Quote Line Group
Quote Process ID	

Salesforce CPQ Package Settings

Salesforce CPQ package settings control the properties of feature areas within Salesforce CPQ. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

- Configure Salesforce CPQ Package Settings

Access the Salesforce CPQ Settings Editor to change settings across the entire package. (Salesforce CPQ Managed Package)

- Document Package Settings

Document page settings manage the creation, distribution, and storage of CPQ quote documents. (Salesforce CPQ Managed Package)

- Group Package Settings

Group package settings manage the naming and organization of your quote's quote line groups and solution groups. (Salesforce CPQ Managed Package)

- Line Editor Package Settings

Configure the line editor package settings to manage the organization, display, and sales rep accessibility of the quote line editor. (Salesforce CPQ Managed Package)

- Plug-in Package Settings

Plug-in package settings let you integrate Salesforce CPQ with optional plug-ins that expand CPQ features. (Salesforce CPQ Managed Package)

- Pricing and Calculation Package Settings

Pricing and calculation package settings manage price calculation on CPQ quotes. (Salesforce CPQ Managed Package)

- Subscription and Renewal Package Settings

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

- Salesforce CPQ Quote Package Settings

Quote package settings manage the creation and maintenance of quotes throughout Salesforce CPQ. (Salesforce CPQ Managed Package)

- Salesforce CPQ Order Package Settings

Order package settings manage the creation of CPQ orders. (Salesforce CPQ Managed Package)

- Additional Salesforce CPQ Package Settings

Additional package settings manage the operation of Salesforce CPQ. (Salesforce CPQ Managed Package)

Configure Salesforce CPQ Package Settings

Access the Salesforce CPQ Settings Editor to change settings across the entire package. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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
Document page settings manage the creation, distribution, and storage of CPQ quote documents. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field Name	Description
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.
Document Folder	Select the folder that contains quote documents after generation.
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.
Enable Multi-Language Translations	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.
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.
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	Click **Request Authorization** to allow Salesforce CPQ to generate and send quote documents on your behalf when you're not logged in to Salesforce. This setting appears only upon the first installation of Salesforce CPQ and disappears after a user selects it.

Field Name	Description
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.

Group Package Settings
Group package settings manage the naming and organization of your quote's quote line groups and solution groups. (Salesforce CPQ Managed Package)

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	Enter the API name of the object that you want to use as the basis of your solution group. For example, if you want to use quote line groups, enter `SBQQ__QuoteLineGroup__c`. 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
Configure the line editor package settings to manage the organization, display, and sales rep accessibility of the quote line editor. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field Name	Description
Hide Renewed Assets When Editing	Hides 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 the total product's final price. We recommend hiding them if you want your sales reps to focus only on editable quote lines.
Enable Column Width Resizing	Allows column width customization in the quote line editor.
Enable Compact Mode	Removes the empty spaces in the quote line editor for quote line drawer fields hidden by a page security plugin.
Visualize Product Hierarchy	Indents 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. The Product Name must be part of the quote line editor field set.
Preserve Bundle Structure	Maintains a bundle's hierarchy and product options in the same order on renewal quotes and amendments. This feature is useful if you organized your bundles with important or frequently edited product options at the beginning.
Keep Bundle Together	When you drag 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 field across your quote and shows the result in the quote line editor's Total field. Net total is the default value. The picklist also shows custom currency fields that you add to the quote object.
Line Subtotals Total 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. The picklist also shows custom currency fields that you add to the quote line object.

Field Name	Description
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. 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	Revises the quote line editor layout so sales reps have an easier time navigating large quotes. The large quote experience includes a single group view, an individual pricing table view with tabs for standard and segmented tables, a fixed quote footer, and locked column headers.
Validate Large Quotes	Evaluates validation rules while the large quote threshold is active and prevents sales reps from performing invalid actions in the quote line editor.
Actions Column Placement	Places the Delete and Edit actions to the left or right of quote lines in the quote line editor.
Enable Multiline 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 group field across your quote and shows the result in the quote line editor's Group Total field. Net total is the default value. This picklist also shows custom currency fields that you add to the quote line group object.
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.

Field Name	Description
Enable Expand/Collapse Bundles	Salesforce CPQ can expand or collapse a bundle in Large Quote Experience only if the Product Name field is part of the quote line editor field set.
Default Bundle Setting	This field appears when Enable Large Quote Experience, Keep Bundles Together, and Visualize Hierarchy are all set to True. Default Bundle Setting is set to Expanded, by default. Contact support to enable the Expand/ Collapse Bundle feature. After the feature is enabled, you can expand and collapse lines in the Quote Line Editor.

Plug-in Package Settings
Plug-in package settings let you integrate Salesforce CPQ with optional plug-ins that expand CPQ features. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Connect a plug-in to Salesforce CPQ by creating a custom script record that contains the plug-in script, and then reference the custom script name in the appropriate Salesforce CPQ plug-in package setting. For developer documentation on CPQ plug-ins, review Salesforce CPQ Plugins

Field Name	Description
Legacy Page Security Plug-in	Page security plug-ins let you override quote line field visibility and editability in the quote line editor.
Billing Plug-in	Implements plug-ins for Salesforce Billing 1.0. No longer supported.
Recommended Products Plug-in	Recommended products plug-ins let you recommend relevant products based on existing products on quotes.
Document Store Plug-in	Document store plug-ins let you integrate Salesforce CPQ with document-management providers.
Order Management Plug-in	Order management plug-ins let you customize how Salesforce CPQ calculates order start dates.
Electronic Signature Plug-in	Electronic signature plug-ins let you integrate Salesforce CPQ with electronic signature providers.
Product Search Plug-in	Product search plug-ins let you modify or add specificity to product filter searches and guided selling searches.

Field Name	Description
Legacy Quote Calculator Plug-in	Legacy quote calculator plug-ins are written in APEX. As of Winter ’17, Salesforce CPQ isn’t developing new features for the Legacy Quote Calculator Plug-in. Salesforce CPQ continues to support admin-related configuration cases for legacy calculator features. Salesforce Customer Support responds to bugs only for regressions from existing legacy calculator features.
Quote Calculator Plug-in	Extend the features of the Salesforce CPQ Quote Calculator by adding a Javascript quote calculator plug-in.
QLE Custom Action Plug-in	A custom action plug-in lets you run code before or after custom actions in Salesforce CPQ. Custom action plug-ins support only cloning actions.

Related information

Billing Rule Amendment Settings

Pricing and Calculation Package Settings

Pricing and calculation package settings manage price calculation on CPQ quotes. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field Name	Description
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.
Authorize New Calculation Service	Enable the Salesforce CPQ Advanced Quote Calculator. This setting appears only upon the first installation of Salesforce CPQ and disappears after a user selects it.
Calculate Immediately	Enable real-time calculations in the quote line editor. Sales reps can avoid clicking **Calculate** to see calculated values in the quote line editor after updating fields. However, they still must Save or Quick Save their quote for Salesforce CPQ to update the quote record and related records. Disabling this feature can improve quote line editor performance.
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.

Field Name	Description
Disable Background Calculation Refresh	In Salesforce Classic, the package setting Disable Background Calculation Refresh affects the results of a save action in the quote line editor. If the setting is active, Salesforce CPQ doesn't update standard object pages following a background quote calculation triggered by a save. This setting is always disabled in Lightning Experience and Salesforce1.
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
Unit Price Scale	Fractional unit prices round off to this many decimal places.
Use Inactive Prices	Use inactive product prices.
Use Integration User for Calculations	Access the external calculation service with an integration user and a short-lived access token. The existing refresh token is removed and the Salesforce CPQ Integration User permission set is created. The new permission set is then added to the CPQIntegrationUserPermSetGroup permission set group. Test by running a calculation from a quote. Verify that you can amend and renew a contract created from an opportunity. If the process finishes without errors, you're using the new access to the calculation service. If there's an error, grant the CPQIntegrationUserPermSetGroup permission set group integration user access to the custom fields or objects used during quote calculations. For example, add a permission set to the permission set group. By default, the CPQ Integration User has the modify all access to the Opportunity object. If you create a custom object with Private as the org-wide default sharing setting, and want to access the custom object for calculations, then grant the CPQ Integration User permission set the view all or modify all access to the custom object. **Note:** Assign additional object permissions to the CPQIntegrationUserPermSetGroup only when you need to allow object or field access for asynchronous calculations. Don't assign any other permissions to this permission set, because doing so can contribute to calculation errors.

Field Name	Description
Use Legacy Calculator	Enable the Salesforce CPQ Legacy Quote Calculator. Salesforce CPQ no longer offers support for this version of the calculator.

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

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. Upgraded assets for renewal quotes aren't added to the account after you contract a renewal opportunity.
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 in the background. This feature can improve performance but increases the risk of a CPU timeout during processing.

Field Name	Description
Enable Evergreen Subscriptions	Salesforce CPQ users can create contracts with subscriptions that don't have end dates. This open-ended term of service allows customers or providers to cancel or terminate the subscription at any point. Evergreen subscriptions let you quote, sell, and manage subscription products without an end date. Enable this setting to let users select Evergreen or Renewable/Evergreen as a product's subscription type. After selecting this setting, evergreen subscriptions can't be disabled. To prevent users from creating evergreen subscriptions, remove the Evergreen and Renewable/Evergreen picklist values from the Subscription Type field.
Use Legacy Amend/Renew Service	In Summer '19 and later, the Large-Scale Amendment and Renewal Service is enabled by default. The new service offers improved support of amendment and renewal actions for contracts with large volumes of related records. The Large-Scale Amendment and Renewal service has several minor feature differences compared to the legacy service. See Salesforce CPQ Large Scale Amendment and Renewal Service. To revert to the previous service's functionality, select **Use Legacy Amend/Renew Service**.

Field Name	Description
Disable Product Bundle Sub Type Checks	By default, Salesforce CPQ restricts the ability to change the subscription type for product setup so that bundles aren't created with a mix of Evergreen products and Renewable products. This validation keeps you from changing the product's subscription type. This feature allows you to bypass the bundle subtype validation. Disable the validation if you must change a type to One-time. If the validation is disabled, bundles can be incorrectly made with a mix of Evergreen and Renewable, which causes bad data. Use this setting only when Enable Evergreen Subscriptions is selected. This setting applies only when modifying a bundle product. It doesn't apply when adding product options to a bundle. While this setting is active, Salesforce CPQ bypasses the validation only for bundles made before the setting was activated. Salesforce CPQ still runs the validation for bundles made after activating the setting, and for new bundle products added to bundles made before activating the setting.
Disable Add Subscriptions	Removes the Add Subscriptions button from renewal quotes.
Subscription Term Unit	Salesforce CPQ determines subscription length by evaluating this field with the quote's subscription term.
Ignore Leap Year Day	The subscription package settings page shows Ignore Leap Year Day only when Subscription Prorate Precision has a value of Day, or Day with Calendar Month Weighted. When you use daily subscription proration precision, Salesforce CPQ evaluates your quote line's dates to see whether they're part of a leap year. If so, CPQ divides the subscription term length by 366 during prorate multiplier calculations on the quote line. CPQ also uses 366 days when calculating renewal terms for contracts that fall in a leap year. However, when Ignore Leap Year Day is active, Salesforce CPQ always uses 365 days for prorate multiplier and renewal term calculations.

Field Name	Description
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. The product fields Include in Percent of Total and Exclude from Percent of Total override the effects of this setting. For example, if this setting is active while a covered product with Exclude from Percent of Total is added to an amendment quote, Salesforce CPQ doesn't include it in percent of total calculations.
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.
PoT Renewals(Contracting from Orders)	Renew subscribed assets when contracting from orders. The Percent of Total subscription retains relationships with their covered assets on the renewal quote. Use this setting to continue updating the Percent of Total subscription with new covered products for the subscription's entire lifecycle. If the Order By field is used to create multiple orders, the covered assets on a renewal quote and Percent of Total subscriptions must be part of the same order and have the same value as the Order By field. Also, orders now show zero-quantity order products for covered assets from renewal quotes, so you no longer have to return to the initial quote for review. For this setting to work, you must also go to your Order Settings and select **Enable Zero Quantity Orders**.
Bypass Preserve Bundle Structure	The Bypass Preserve Bundle Structure setting removes the requirement to keep the original bundle structure. Your bundle products become individual quote lines on the amendment quote. When you enable this setting and deselect the Preserve Bundle Structure field on the contract, unexpected price changes or unforeseen product and price rule behavior changes can occur.

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

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 its opportunity products. When you enable this setting, Salesforce CPQ doesn't create quote lines for the opportunity products. When Salesforce CPQ creates a quote line from an opportunity product, the bundle products aren't included in the quote line because the bundle structure data isn't available in the opportunity product. When Salesforce CPQ creates a quote line from an opportunity product, MDQ products (multi-dimensional quoting products) aren't segmented because the MDQ product data isn't available in the opportunity product.
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.
Default Quote Validity (Days)	The quote's expiration date equals the quote's creation date plus the default quote validity value. For example, if a quote is created on June 1, 2021, and the default quote validity is 28, the quote's expiration date is June 29, 2021. If the default quote validity is null, the quote's expiration date is null. The quote's expiration date has no default functionality, but it can be used in custom automation.

Salesforce CPQ Order Package Settings
Order package settings manage the creation of CPQ orders. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field Name	Description
Allow Multiple Orders	Sales reps can split a quote's quote lines into multiple orders. This setting is available only in Salesforce CPQ+.
Create Orders Without Opportunities	Allow sales reps to create an order from a CPQ quote that doesn't have a parent opportunity.
Default Order Start Date	Orders start on this date by default.
Require Approved Quote	Sales reps can't order a quote until it has a Status field value of Approved.

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

Available in: All Salesforce CPQ Package Settings

Field Name	Description
Enable Large Configurations	Enable configuration to include more than 400 products in product bundles. Because enabling large configurations slows down processing for all bundles, enable this setting only if your org requires it.
Enable Product Option Drawer	Allow admins to create a set of configuration attributes that sales reps can assign to any number of product options.
External Configurator URL	Salesforce CPQ opens this URL when a sales rep configures a product marked as externally configurable.
Hide Features with Hidden Options	When a product with Option Selection Method Click has a feature with only hidden options, remove the warning No visible options in feature (X).
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.
OAuth Refresh Token	Salesforce CPQ runs Mass Document Generation batch processes under this user.
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.

Field Name	Description
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. Guided selling results don't display correctly when this setting targets a custom field.
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.
Quantity Scale	The scale of quantity fields in custom pages and quote documents.
Service Region	Operate advanced calculator and document generation web services in this Heroku Private Space region. Set the service region to **Default**.
Sort Products In Memory	Sorting products in memory during product search can improve CPQ page loading speeds for customers with large price books. We recommend using this setting only if you use large price books that cause slowdowns when you're showing and searching products in CPQ.
Theme	Apply this theme to Visualforce pages for all this org's users. User-assigned themes override this value.
Triggers Disabled	Disable CPQ triggers temporarily if you're migrating data or performing another action where you don't want to fire triggers. This setting also disables triggers in the Service Cloud for CPQ package.
Use Global Header Permission	Enforces a custom permission that admins can assign to users to hide the Salesforce header in custom pages. This permission only works in Aloha.

Protect Your Data with Salesforce Shield

Salesforce Shield is a set of security tools that helps you comply with regulations on storing sensitive information. With Shield Platform Encryption and Event Monitoring, you can monitor usage, prevent malicious activity, and protect data at rest while allowing full functionality. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Shield Platform Encryption

Shield Platform Encryption lets you encrypt your most sensitive information at rest so you can address requirements for storing protected data. Encryption enables you to meet both external and internal data compliance policies while keeping critical app functionality—like search, workflow, and validation rules. You keep full control over encryption keys, and can set encrypted data permissions to protect data from unauthorized users.

Event Monitoring

Event Monitoring gives you access to detailed performance, security, and usage data on all your Salesforce apps. Every interaction is tracked and accessible via the API, so you can view it in the data visualization app of your choice. See who is accessing critical business data when, and from where they're getting access. Understand user adoption across your apps. Troubleshoot and optimize performance to improve end-user experience. Event Monitoring data can be easily imported into any data visualization or application monitoring tool like CRM Analytics, Splunk, or New Relic. To get started, check out our Event Monitoring Trailhead module.

Related information

Strengthen Your Data's Security with Shield Platform Encryption

Salesforce CPQ: What's Different or Not Available in the Salesforce Mobile App

Not every Salesforce CPQ feature is in the Salesforce mobile app. Learn about the differences between desktop and mobile experiences in Salesforce CPQ. Additionally, the Salesforce mobile app uses your Salesforce CPQ edition and your user profile and permission sets to determine the features you can access. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Quotes

- Selecting primary contacts on quotes doesn't auto-populate the phone, fax, or email field of the contacts under quote details on the quote record home page.
- Creating quote documents isn't supported. You generate quote documents in the desktop app first. Your documents then show in the Quote Documents related list on the corresponding quote.
- The Clone with Related action lets you preview the related items, but the page isn't formatted for the mobile experience.
- To view a new quote after creating it, tap the quote from the opportunity's Quotes related list or the quote's list view.

Quote Line Editor

- Product search isn't available. Use the filter icon to find products based on Product Name and Product Code.
- On mobile, Salesforce CPQ doesn't use the product option drawer attributes. This also means that the compact mode setting isn't supported. The Standard Line Item Drawer field set is appended to the end of the Line Editor field set.
- To view the Actions column, close the quote line header details, and then swipe left on the header level quote line of the configurable product. The quote line's header must be closed for the swipe to work.
- The quote line editor doesn't show on one page, but instead has tabs separating the quote and quote line fields. Specifically, the quote's Line Editor field set appears on one tab, and the quote line's Line Editor field set appears on another tab.
- Rich Text Editor (RTE) isn't available, so RTE fields such as Description aren't editable.
- When adding products configured for multi-dimensional quoting, another Segment tab appears. This tab is for configuring quantity and pricing for each segment of the term.
- Grouping quote lines adds another set of tabs that replaces the standard tab with a Group tab. The standard tab moves to within the group, and a group-specific Detail tab is added at the group level.

- After quote line groups are added to a quote, you can't add products to the quote outside of quote line groups.
- The Product Results Group field in the Salesforce CPQ package level settings isn't supported. For this reason, products in the product selection screen appear chronologically, based on the Sort Order field, followed by Product Code.

Orders

- To create an order, use the opportunity or quote's Ordered checkbox.
- Orders can be contracted in the Salesforce mobile app.

Salesforce CPQ in the Salesforce Mobile App for Salesforce Admins

- Salesforce admins can't access Setup to configure or change Salesforce CPQ Package Settings in the Salesforce mobile app.
- Admins can do only a limited amount of configuration to the Price Rule, Product, Product Rule, and Summary Variable objects.

Salesforce CPQ Features Not Available in the Salesforce Mobile App

- Usage-based pricing isn't supported.
- Consumption rates, consumption schedules, and price books aren't available.
- You can't resize columns in the Salesforce mobile app. Column widths you set in the desktop site apply to the Salesforce mobile app. Resetting column widths to the default is available only in the desktop site.

Related information

Knowledge article: Enable Salesforce CPQ for the Salesforce App on Mobile Devices

Knowledge article: Salesforce CPQ Mobile Limitations and Usability Differences

Manage Products in Salesforce CPQ

Build and optimize your product catalog to accelerate your quote-to-cash cycle. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Important:

The Salesforce CPQ managed package continues to be available for existing customers, however, there is no longer any new feature development. We will continue to provide support and services for the duration of your contract. You can also add more user licenses to your Salesforce org during your current subscription term and renew existing subscriptions.

For a more comprehensive and robust CPQ solution, we recommend exploring Revenue Cloud.

Watch this introductory video to learn how to create and optimize a product catalog in Salesforce CPQ. Organize products, explore key fields on product records, and add a product to a quote from both sales and admin perspectives.

Ready to get started? Begin by exploring these resources:

- Types of Products in Salesforce CPQ

Configure your products to match your pricing and selling needs. (Salesforce CPQ Managed Package)

- Product Pricing Methods in Salesforce CPQ

Apply various discounts or markups to customize pricing on your products. (Salesforce CPQ Managed Package)

- Summary Variables

Summarize number field information about products into a single object called a summary variable. You can reference a summary variable in price conditions, price actions, product rule error conditions, quote term conditions, and other summary variables. (Salesforce CPQ Managed Package)

- Salesforce CPQ Product Fields

Salesforce CPQ provides custom-managed fields for products. (Salesforce CPQ Managed Package)

Types of Products in Salesforce CPQ

Configure your products to match your pricing and selling needs. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

- Product Bundles in Salesforce CPQ

A bundle is a product with optional features or components that you want to include on a single quote line. (Salesforce CPQ Managed Package)

- Multidimensional Quoting (MDQ) Products in Salesforce CPQ

You can show a fixed-price subscription product in the quote line editor as one quote line broken into segments. Each segment represents a unit of time (quarter, month, year, or custom) and has pricing and a quantity independent of the line's other segments. We call these products multi-dimensional quoting (MDQ) products. They're useful if you want your sales reps to have detailed control over pricing specific units of time within one subscription. (Salesforce CPQ Managed Package)

- Subscription Products in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Usage-Based Products in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Product Bundles in Salesforce CPQ

A bundle is a product with optional features or components that you want to include on a single quote line. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Note:

To learn about product bundles in Salesforce CPQ:

- Explore Configurable Bundles in Salesforce CPQ on Trailhead.

For a deep dive into product bundles, watch this video:

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.

Note: Bundles can't contain both products with a subscription type of Evergreen and products with a subscription type of Renewable. Products with a subscription type of Evergreen/Renewable can't be bundled.

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. (Salesforce CPQ Managed Package)

- Add Bundle-Specific Field Sets

Create field sets that display for only products in certain bundle products or product features. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Product Options in Salesforce CPQ

Product options are individual products that users can select from when configuring a bundle. (Salesforce CPQ Managed Package)

- Constraint Guidelines

Enable or disable a product option for selection relative to another product option. (Salesforce CPQ Managed Package)

- Configuration Attribute Guidelines

Use configuration attributes to set the value of multiple shared product option fields simultaneously. (Salesforce CPQ Managed Package)

- Guidelines and Considerations for Using Nested Bundles

A nested bundle lets users select from a subset of options within a single product option. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Related concepts

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. (Salesforce CPQ Managed Package)

Create a Bundle

Configure a bundle product using a combination of options and features. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All CPQ Editions

Review the following fields when creating a bundle feature.

Category	Assign a feature to a category if you want to group multiple features together under a single tab within the configurator.
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.
Discount Schedule	Lookup to a Discount Schedule that applies to all this feature's options. This value overrides any discount schedule defined on the product option's product record. However, it doesn't override a discount schedule on the product option record.
Dynamic Option Lookup Field Set	This field set lets you define fields that you can filter by in a dynamic feature and lets you define columns that return in the dynamic product lookup. The fields specified on this field set are available in the product selection page after you click **Add Options** under the dynamic feature. Define the field set specified in the Dynamic Option Lookup field set on the Product2 object, with the field set API name as the value.

	Fields in this field set don't filter unless they're in the field set. These fields must exist as product field sets, not product option field sets.
Feature Name	(Required) Provide a meaningful name for your feature
Max Options	Set the maximum number of options for this feature that can be selected as part of the product bundle
Number	(Required) Determine how this feature is ordered relative to other features in the parent product record's related list
Option Selection Method	Choose the way users can add products or options to the feature. • Click: Checkboxes appear next to each option • Add: Options don't 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. **Important:** When you're using features with the option selection method set to Dynamic, selected products aren't considered product options by product or price rules, unless the Dynamic feature is the child of a product option.
(Required) Min Options	Set the minimum number of options for this feature that must be part of the product bundle

Product Options in Salesforce CPQ
Product options are individual products that users can select from when configuring a bundle. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

- Considerations for Product Options

Keep these considerations in mind when you're working with product options. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Review the following fields when creating a product option.

Apply Immediately

Changes to this product option's fields take effect immediately in the configurator. When this field is inactive, Salesforce CPQ doesn't apply changes until the sales rep saves the bundle or navigates to a different bundle level. We recommend enabling this field sparingly to avoid a slow user experience. To give sales reps the option to run edit rules on demand, you can also use the Apply Rules custom action. The Apply Rules custom action is a button that allows users to run edit rules when changing a bundle.

Apply Immediately Context

If Apply Immediately is active, Salesforce CPQ applies product option changes in the configurator based on this field's values.

- Always: Salesforce CPQ applies new or changed fields after every field change.
- On Selection: Salesforce CPQ applies new or changed fields whenever one of the bundle's product options is selected.
- On Quantity Change: Salesforce CPQ applies new or changed fields whenever the product option's Quantity field changes.
- Null: Salesforce CPQ treats this field as if its value was On Selection.

If an Edit-type product rule evaluates a product option while this field is null, Salesforce CPQ treats its value as On Selection.

Bundled

Indicate that this product is bundled with a parent product. Bundled option prices are included in the bundle parent's price, so they have a fixed quantity, can't be discounted, and have a price of zero. Leave this field deselected if users manually add a price to their option.

Component Code & Component Code Position

The component code position is a placeholder value that you reference in the product's configured code pattern. When the bundle appears in the quote line editor, Salesforce CPQ shows this code on the bundle parent quote line's Package Product Code field. Package product codes are a useful way to quickly create SKUs for bundles with many possible configurations.

Component Description & Component Description Position

A bundle parent's package product description shows the product options that a sales rep chose in the configurator. It references the product's configured description pattern, which defines a template for the package product description appears. The product option's component description represents how this product option appears in the package product description. We recommend making it the same as your product option's Configured SKU. The package product description shows component descriptions if the component description position matches a value in the configured description pattern.

Configured SKU

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.

Default Pricing Table

Determines whether quote lines for MDQ product options appear in the quote line editor's Standard or Segmented pricing table.

Discount (%)

A percentage discount that applies to your configured SKU only when it's part of a bundle.

Discount (Amt)

An amount-based discount that applies to your configured SKU only when it's part of a bundle.

Discounted By Package

If the bundle parent has a percentage-based Additional Discount, Salesforce CPQ also applies it to quote lines generated from this product option.

Discount Schedule

Applies this discount schedule to quote lines generated from this product option. The discount schedule overrides discount schedules on the product or feature related to this product option. This field is useful when you have a product sold standalone or as part of a bundle and want unique discount schedules for each type of sale.

Existing Quantity

The total quantity of assets related to this product option.

Feature

The feature that includes this option. This process depends on the configured SKU.

Max Quantity

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

Min Quantity

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

Number

Determines how this product option is ordered relative to other product options in the parent product record's related list.

Optional SKU

A lookup to the product that this option represents.

Percent of Total Scope

Selects the bundle parts covered by a Percent of Total product option.

- Package: Your percent of total product covers only the bundle parent.

- Components: Covers only other product options on the same level.
- Both: Covers the bundle parent, and other product options on the same level.
- Hierarchy: Covers the entire bundle configuration, including all parent and child bundles.

Quantity

The default quantity for this product option when a sales rep adds it to the quote. If this field is empty, sales reps can edit the product option’s quantity.

Quantity Editable

Allows sales reps to edit this product option’s quantity in the quote line editor if it already has a value in the Quantity field.

Quote Line Visibility

Hides this product option’s quote lines in quote documents, the quote line editor, or both. When this field’s value is Never or Document Only, quote lines created from the product option are numbered starting at 3000.

Renewal Product Option

When a sales rep renews a bundle containing the current product option, Salesforce CPQ replaces it with the product option record defined in this field.

Required

Make this product required on the bundle.

Selected

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

System

Sales reps can’t select or deselect this product option manually in the configurator. Only Salesforce CPQ system features and processes, such as product rules or process builders can change its selected status.

If a product feature’s Option Selection Method is set to Add, and either **Selected** or **Required** (or both) is selected, a product option where **System** is selected is added as an option and is available to be added again on the Add Options page in case the user wants to add more.

Type

Choose one of the following:

- Component: Salesforce CPQ multiplies this option's quantity by the quantity of the bundle parent. For example, a sales rep configures a server bundle product and adds a hard drive product option with a quantity of two. When they change the server bundle parent's quantity to two in the quote line editor, the child hard drive quote line changes its quantity to four.

  Note: If this option is a percent of total (POT) subscription product, Salesforce doesn’t multiply the option's quantity by the quantity of the bundle parent. The quantity of POT subscription products is always the default quantity or the quantity set during configuration.
- Accessory: The 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: The option is an independent product that can also be related to a bundle. Useful 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 isn'teditable 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.

Unit Price

Overrides the price book's price value for this product option.

Uplifted By Package

If this product option has a configured SKU with price dimensions, the resulting quote line inherits the Uplift or Uplift (Amt) value from the bundle parent's quote line.

System Fields

Product options inherit the following fields from their optional SKUs. Salesforce CPQ uses them for reference and users can't change them.

- Product Code
- Product Configuration Type
- Product Description
- Product Family
- Product Name
- Product Quantity Scale
- Product Subscription Pricing
- Price Editable

Related concepts

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. (Salesforce CPQ Managed Package)

Related tasks

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. (Salesforce CPQ Managed Package)

Considerations for Product Options
Keep these considerations in mind when you're working with product options. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

- When you save a bundle configuration, Salesforce CPQ lists the bundle options in the quote line editor according to their display order within the bundle's configuration. If you reconfigure the bundle later,

options selected during previous configurations are always present before options chosen during later configurations.

- For example, you have a bundle product with options A, B, C, and D. Option A is present before B in configuration, B is before C, and C is before D. During initial configuration, you select options A and C, so the configured bundle lists the options in the following order:

  1. A
  2. C

- Next, you reconfigure the bundle and select options B and D. The configured bundle now lists the options in the following order.

  1. A
  2. C
  3. B
  4. D

- 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 can't 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 isn't 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 don't 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 don't 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.
- When a product has Quantity Editable selected, and its related product option has a type of Related Product and Quantity Editable deselected, the resulting quote line has an editable quantity in the quote line editor but not in the configurator.
- When component-type quote lines are ordered, you must order the parent product.
- JSAR doesn't support bundles where the parent is designated as optional.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’18 and later

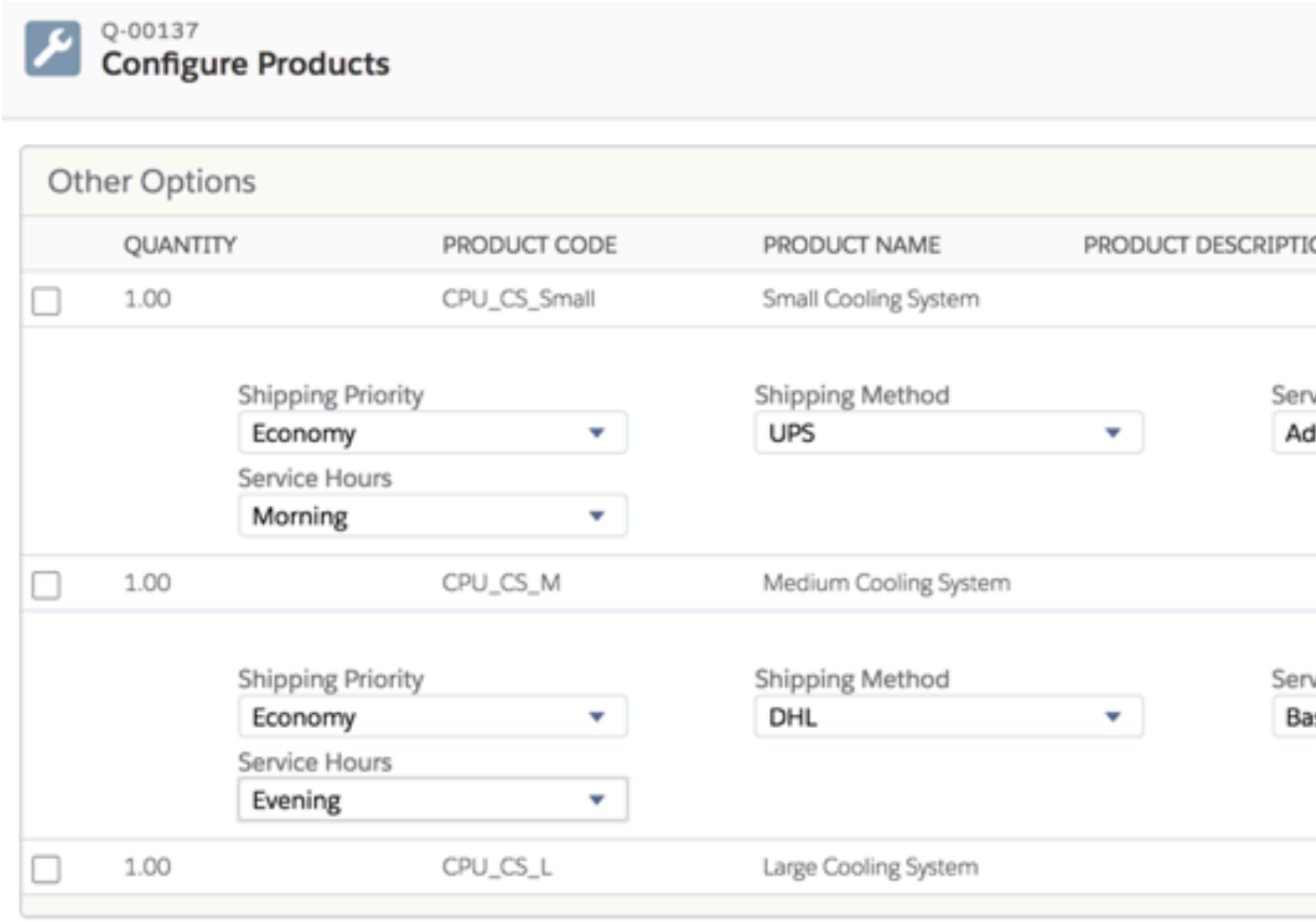
When you create a configuration attribute record, you can choose whether its record type is Configuration Attribute or Global Attribute. Choosing Global Attribute lets you create the record without assigning it to bundle product. That way, you can use the attribute across several different bundles, or 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.

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Considerations for Global Attributes

Keep a few things in mind when you're working with global attributes. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '18 and later

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 `Profiles`, and then select **Profiles**.
   b) Select **S**, and then select **System Administrator**.
   c) Under Custom Record Type Settings, select **Edit** for Configuration Attributes.
   d) In Available Record Types, select **Configuration Attribute**, and then select **Add**.
   e) In Available Record Types, select **Global Attribute**, and then select **Add**.
   f) Verify that Configuration Attribute is the default record type, and then save your changes.
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

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '18 and later

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 option fields 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) Enter a 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.

Product option drawers are visible only when the option selection method has a value of Click.

Considerations for Global Attributes

Keep a few things in mind when you're working with global attributes. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '18 and later

- Global attributes can't be used in product rule conditions.
- 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.
- Product option drawers aren’t supported in mobile devices. As a result, when you use the configurator in Salesforce CPQ mobile, the global attributes aren’t available.
- Global attributes inherit their values from the related product option. They don’t support default objects and default fields.

Constraint Guidelines
Enable or disable a product option for selection relative to another product option. (Salesforce CPQ Managed Package)

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.

In bundles with an Option Selection Method of Add, option constraints don't work inside Option Lookup.

When using option constraint groups, if values are separated by commas without spaces between each value, Salesforce CPQ connects each value using an OR operator. If values are separated by commas with spaces, Salesforce CPQ connects each value using an AND operator.

- Value1,Value2,Value3 = Value1 OR Value2 OR Value3
- Value1, Value2, Value3 = Value1 AND Value2 AND Value3

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**.

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

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

Use configuration attributes to set the value of multiple shared product option fields simultaneously. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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.
Auto-Select	When sales reps add a product to this bundle from a dynamic feature, Salesforce CPQ evaluates whether the product contains a field that matches one of the feature's configuation attributes. If the two fields match, and the product's field contains a value, the configuration attribute inherits that value.
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.

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 and Considerations for Using Nested Bundles

A nested bundle lets users select from a subset of options within a single product option. (Salesforce CPQ Managed Package)

Available in: All CPQ Editions

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. As of Spring '20, product bundles can be set as expanded or collapsed by default. To save screen space. In your installed package settings, on the Line Editor tab, check **Enable Expand/Collapse Bundles,**. If this setting is unavailable, ensure that you also check **Enable Large Quote Experience**, **Visualize Product Hierarchy**, and **Keep Bundles Together**. After the feature is enabled, you can choose the Default Bundle Setting.

"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."

Nested bundles can't be upgraded.

Contracting by subscription start date isn't supported end to end for bundled subscriptions with different start dates than their parent product has.

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.

Related concepts

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

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 41: 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

Related concepts

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

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.

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.

Related concepts

Product Option Fields

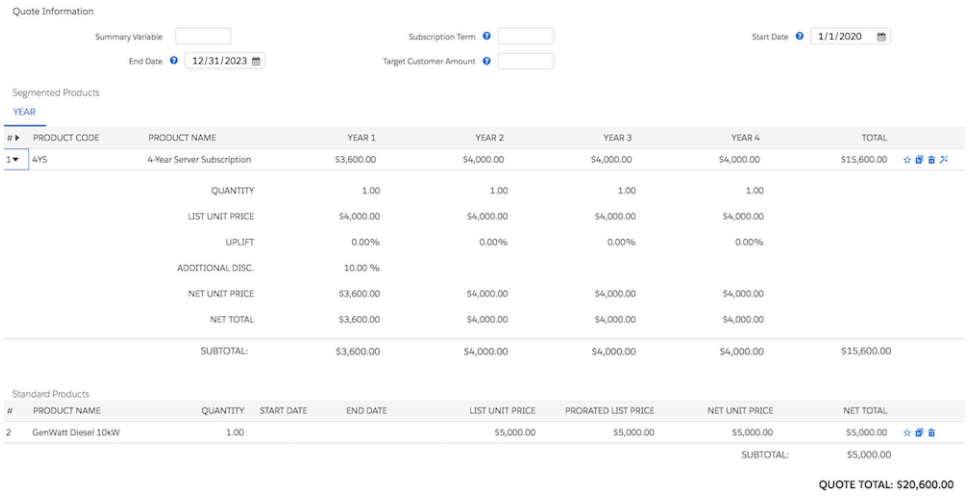
To create or modify a price action, enter the information in the appropriate fields. Some fields aren't visible or editable depending on the page layout and field-level security settings. (Salesforce CPQ Managed Package)

Multidimensional Quoting (MDQ) Products in Salesforce CPQ

You can show a fixed-price subscription product in the quote line editor as one quote line broken into segments. Each segment represents a unit of time (quarter, month, year, or custom) and has pricing and a quantity independent of the line's other segments. We call these products multi-dimensional quoting (MDQ) products. They're useful if you want your sales reps to have detailed control over pricing specific units of time within one subscription. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '15 and later

Here's a simple example of an MDQ product for a 12-month, $4,000 subscription quoted for four years.


Quote Information

Summary Variable | Subscription Term | Start Date 1/1/2020

End Date 12/31/2023 | Target Customer Amount

Segmented Products

YEAR

#	PRODUCT CODE	PRODUCT NAME	YEAR 1	YEAR 2	YEAR 3	YEAR 4	TOTAL
1	4YS	4-Year Server Subscription	$3,600.00	$4,000.00	$4,000.00	$4,000.00	$15,600.00
		QUANTITY	1.00	1.00	1.00	1.00	
		LIST UNIT PRICE	$4,000.00	$4,000.00	$4,000.00	$4,000.00	
		UPLIFT	0.00%	0.00%	0.00%	0.00%	
		ADDITIONAL DISC.	10.00 %				
		NET UNIT PRICE	$3,600.00	$4,000.00	$4,000.00	$4,000.00	
		NET TOTAL	$3,600.00	$4,000.00	$4,000.00	$4,000.00	
		SUBTOTAL:	$3,600.00	$4,000.00	$4,000.00	$4,000.00	$15,600.00

Standard Products

#	PRODUCT NAME	QUANTITY	START DATE	END DATE	LIST UNIT PRICE	PRORATED LIST PRICE	NET UNIT PRICE	NET TOTAL
2	GenWatt Diesel 10kW	1.00			$5,000.00	$5,000.00	$5,000.00	$5,000.00
							SUBTOTAL:	$5,000.00

QUOTE TOTAL: $20,600.00

Segments are repeated over the quote's term. In this case, our product has a subscription term of 12 months with yearly segments. So, Salesforce CPQ creates one segment for each year of the quote's four-year term. Thus we have four segments with an initial price of $4,000 each. Each segment can be discounted or marked up independently of other segments, so we've also given a 10% discount to the first segment.

Define segments on an MDQ product by creating a price dimension from your subscription product's Price Dimensions related list. The price dimension also lets you control whether sales reps can edit the cost, quantity, or discounts of segments or whether the segments inherit editability of these fields from their parent product record.

Quote lines for MDQ products appear by default in the Segmented Products table, while other quote lines in the Standard Products table. Sales reps can hide an MDQ line's segments and move it to the standard table by clicking the segmentation icon . Clicking the segmentation icon again moves the MDQ line back to the Segmented products table and shows its segments. The product field Default Pricing Table field also lets you control whether an MDQ product's quote line appears in the segmented or standard table when added to a quote.

Fixed-length MDQ products must use a subscription term that matches their dimension type. For example, a quarterly MDQ product must use a subscription term of 3, and a yearly MDQ product must use a subscription term of 12.

Tip: To add a one-time charge, such as an installation fee, create a price dimension with a Type value of One-Time. Then, set its unit price to your desired value. 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.

Your company sells generators and provides an installation service for $1,000 and an ongoing manual subscription service for $500. You can use MDQ pricing to create a subscription product that handles the one-time fee and the subscription service. For example, you can set up the Generator Service product as follows.

1. Create a product to represent the subscription.
   - Subscription Pricing: Fixed Price
   - Subscription Term: 12
   - List Unit Price: $500

2. Create a price dimension to represent the subscription service. From your Generator Service product, go to the Price Dimensions related list and click **New**. Give your price dimension the following values.
   - Dimension Name: Yearly Service
   - Type: Year
3. Create another price dimension to represent the one-time fee.

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

- Guidelines for MDQ Products

Consider a few points before you create MDQ products. (Salesforce CPQ Managed Package)

- MDQ Products in Quote Documents

Salesforce CPQ provides several methods for showing MDQ products in quote documents. (Salesforce CPQ Managed Package)

- Product Configuration Permissions in Salesforce CPQ

Depending on your settings and your company's internal processes, it can be necessary to customize product configuration permissions for your users. (Salesforce CPQ Managed Package)

Related concepts

Differences Between the Legacy and Large-Scale Amendment and Renewal Services

The Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service determine some data differently, such as renewal price and quote start dates. If you switch to the large-scale service, adjustments can be required, and an optional Visualforce component provides extra functionality. (Salesforce CPQ Managed Package)

Guidelines for MDQ Products

Consider a few points before you create MDQ products. (Salesforce CPQ Managed Package)

- General Guidelines for MDQ Products

Review general guidelines for MDQ products. (Salesforce CPQ Managed Package)

- Guidelines for MDQ Bundle Products

Review guidelines for using MDQ products with bundles. (Salesforce CPQ Managed Package)

- Guidelines for Percent of Total Products Covering MDQ Products

Review how Salesforce CPQ calculates the net total of Percent of Total products that cover MDQ products. (Salesforce CPQ Managed Package)

- Guidelines for Contracting, Amending, and Renewing MDQ Products

Review guidelines for contracting, amending, and renewing MDQ products. (Salesforce CPQ Managed Package)

Related concepts

Amending MDQ Products

Amend a contract containing multidimensional quoting (MDQ) products. This process is useful if you want to change a multiple-year contract partway through its term. (Salesforce CPQ Managed Package)

General Guidelines for MDQ Products

Review general guidelines for MDQ products. (Salesforce CPQ Managed Package)

- Quotes require start dates to calculate MDQ quote line prices correctly.
- Salesforce CPQ doesn't support more than one One-Time price dimension per product.
- Package-setting subscription term units for MDQ products support only month-based subscriptions. Subscriptions' prorate precision also impacts the pricing for MDQ products. See Salesforce Help for details.

- The Pricing & Calculation package setting Allow Non-Consecutive Custom Segments lets you create custom segments with start dates that are more than one day after the previous segment's end date.
- The start and end dates on non-custom segments of MDQ products aren't editable. The dates on custom segments are editable.
- MDQ products don't support usage pricing.
- You can't associate product options or configuration attributes with an MDQ product. If a configuration attribute or product option is associated, the standalone MDQ product appears on the standard table when you're adding it to the quote.
- 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 a full-year term, 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 could also move the prorated three-month term appearing in Year 4 to the first price dimension by adjusting the quote's First Segment Term End Date field. This field lets you ensure the last segment reflects the price of an entire year. Since all renewal terms are based on the last segment, this process lets you avoid undesirable renewal terms.
- 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.
- On MDQ products, either apply a price uplift to the quote line or edit a segment's list price. If you do both, the uplift isn't applied correctly.
- For quoted MDQ products, if the last segment's end date (or the quote's end date) is the last day of daylight savings time, Salesforce CPQ creates an extra pricing segment with a net total of zero.
- The quote field First Segment Term End Date isn't supported in add-on quotes and amendment quotes that contain a combination of non-custom MDQ price dimension types.
- MDQ segments with zero quantity don't create an order product, and prevents the order from being activated.
- MDQ segments are generated before the calculation process begins. Therefore, Price Rules and QCPs that change the End Date or Subscription Term after the calculation process has already started do not change the number of MDQ Segments that are generated on the current calculation pass.
- When you desegment an MDQ product in the quote line editor, the Uplift % field is cleared.

Guidelines for MDQ Bundle Products
Review guidelines for using MDQ products with bundles. (Salesforce CPQ Managed Package)

- MDQ products can't be bundle parents.
- You can't associate product options with an MDQ product.
- MDQ products aren't configurable and MDQ products can't have configuration attributes. You can relate a configuration attribute to a product with price dimensions, but you can't access the product or the attribute in the configurator. If a configuration attribute is associated, the standalone MDQ product appears on the standard table when you're adding it to the quote.
- 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 of the quantity of its bundle parent. You can edit the component's quantity in the quote line editor. Salesforce CPQ doesn't multiply it by the parent's quantity as it would for non-MDQ product options.
- Bundle products containing MDQ components must be ordered for the entire quote line quantity.

Note: Suppose that you de-segment a product option and then resegment it. The first year's segment applies the product option unit price. However, the remaining segments apply the price book price. To apply the unit price to the remaining segments, navigate to the parent bundle, click **Reconfigure**, and save. (Product option unit price is dependent on the SBQQ__Bundle__c field set to `True`. Clicking **Reconfigure** sets SBQQ__Bundle__c to `True`.) All segments then apply the product option unit price.

Guidelines for Percent of Total Products Covering MDQ Products
Review how Salesforce CPQ calculates the net total of Percent of Total products that cover MDQ products. (Salesforce CPQ Managed Package)

Salesforce CPQ uses the following formula to calculate the net total of a Percent of Total product that covers a segmented MDQ product.

```
(MDQ line subtotal * Percent of Total (%)) * Number of segments
```

For example, you have an MDQ quote line with five yearly segments. Each year's net total is $1200, and the line's subtotal is $6000. The Percent of Total line that covers the MDQ line has a Percent of Total (%) value of 10. To calculate the Percent of Total line's net total, Salesforce CPQ uses `($6000 * 10%) * 5 = $3000`.

If the MDQ line is unsegmented, Salesforce CPQ doesn't include the number of segments in the calculations. In this example, the Percent of Total line net total is $600.

Note: MDQ and Percent of Total aren't supported in Service Cloud.

Guidelines for Contracting, Amending, and Renewing MDQ Products
Review guidelines for contracting, amending, and renewing MDQ products. (Salesforce CPQ Managed Package)

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 42: 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

- When you contract the opportunity or order from that quote, Salesforce CPQ creates three subscriptions.

Table 43: 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

Considerations for Amending MDQ Products

- Before you can activate an amendment order, you must amend all the product segments.
- When the original quote line has an additional discount, uplift, or volume discount applied, and the amendment quote line's prorate multiplier isn't 1, refunds on amendment quotes aren't always calculated correctly.

Considerations for Renewing MDQ Products

Custom segments renew to the same length regardless of how the renewal term is set on the contract. Custom segments can't be effectively prorated, because their time is arbitrary. For example, if you have a custom segment on initial sale that has 6-month and 12-month segments, and then you try to renew to a year-long renewal term, the renewal quote lines for the custom segments are still 6 and 12 months, not 4 and 8.

Important: If you amend a contract that includes an MDQ product and you renew after the first term segment has completed, the segment information for that first term will be blank in the Quote Line Editor. To update the missing information, you must select **View/Edit** on the Quote Line Detail page.

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

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. (Salesforce CPQ Managed Package)

- Organize MDQ Products by Template Columns

Show price dimensions organized by template columns within your org's quote documents. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

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
Show price dimensions organized by template columns within your org’s quote documents. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’16 and later

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.

Product Configuration Permissions in Salesforce CPQ

Depending on your settings and your company's internal processes, it can be necessary to customize product configuration permissions for your users. (Salesforce CPQ Managed Package)

Product Configuration

Action Type	Read	Create	Edit	Delete	Notes
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
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

Subscription Products in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Subscription products have two pricing types, controlled by the Subscription Pricing field.

- 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.

The product's Subscription Type field lets you control how Salesforce CPQ handles renewals for your subscription product.

- Renewable: Salesforce CPQ includes this subscription in renewal quotes.
- One-Time: Salesforce CPQ won't include this subscription in renewal quotes.
- Evergreen: This subscription remains active until canceled and can't be renewed.
- Evergreen/Renewable: Users can define whether this subscription is renewable or evergreen on individual quote lines in the quote line editor. The subscription records created from the quote line inherit the quote line's subscription type.

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.

- Subscription Terms

A product’s subscription term is the default amount of time that a subscription lasts. The CPQ package setting Subscription Term Unit controls whether the term is in months or days, and defaults to months. (Salesforce CPQ Managed Package)

- Percent of Total Pricing in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Evergreen Subscriptions in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

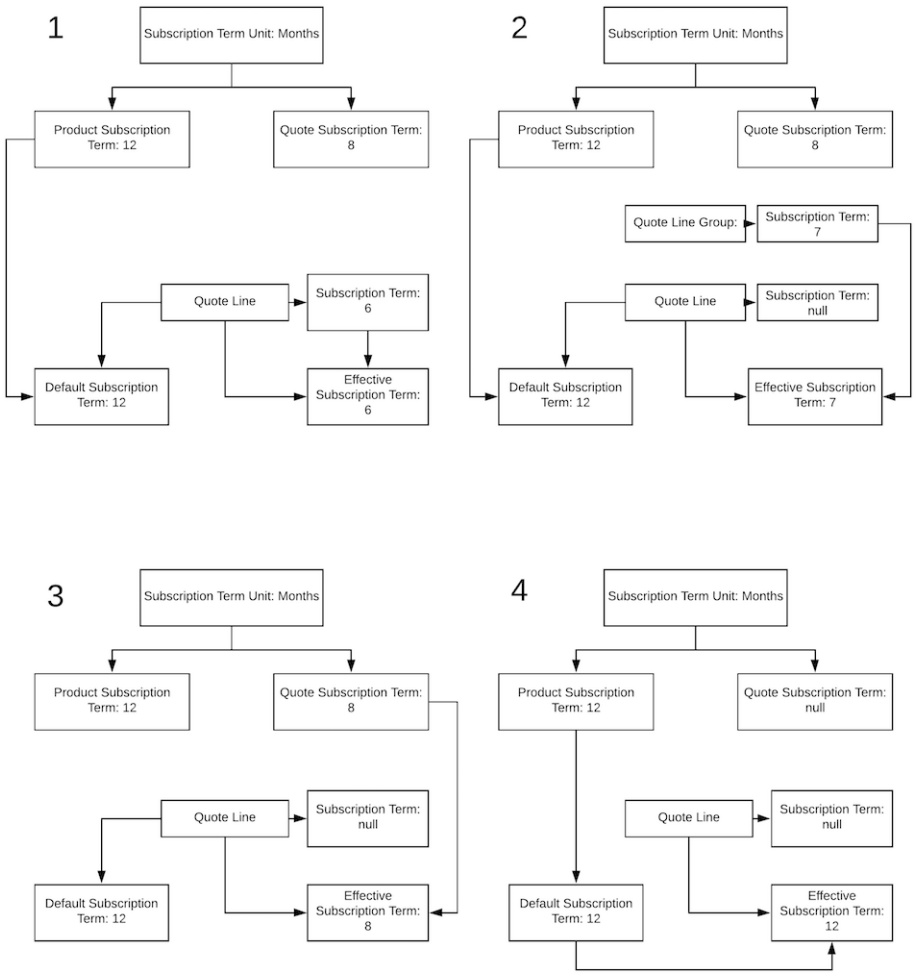
Subscription Terms

A product’s subscription term is the default amount of time that a subscription lasts. The CPQ package setting Subscription Term Unit controls whether the term is in months or days, and defaults to months. (Salesforce CPQ Managed Package)

Note: Daily subscription term units aren’t available in Salesforce Billing.

When a sales rep adds the product to a quote, the resulting quote line’s Default Subscription Term field inherits the value of the product’s subscription term. The default subscription term is an easy way to quickly see the parent product’s subscription term. Users can’t change it.

The quote line’s Effective Subscription Term field shows the quote line’s actual term length for use in proration. The value of this field varies based on whether you define a subscription term on your quote, quote line, or a quote line group.



- By default, the quote line's effective subscription term inherits the product's subscription term.
- If the quote line has a Subscription Term value, the effective subscription term inherits it. (1)
- If the quote line's subscription term is null and the quote line is part of a quote line group, the effective subscription term inherits the group's subscription term. (2)
- If the quote line's subscription term is null and the quote line isn't part of a quote line group, the effective subscription term inherits the quote's subscription term. (3)
- If the quote line and quote's subscription terms are null and the quote line isn't part of a group, the effective subscription term inherits the quote line's default subscription term. (4)

When a quote line's Effective Subscription Term field is different from its Default Subscription term field, Salesforce CPQ adjusts subscription quote line pricing to reflect the correct subscription term. The prorated price appears in the Prorated List Price field.

Related reference

Salesforce CPQ Subscription Fields

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 their field values from their subscription product quote line items or order products. (Salesforce CPQ Managed Package)

Percent of Total Pricing in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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

Important: Subscription Percent of Total products must have pricing methods set only to List. They don't work with pricing methods set to Percent of Total.

Products contain several other fields that let you customize the percent of total price calculation process, but you need only these 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 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 on 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 price of the percent of total product.

If you amend an order and add a percent of total product as a net new order item, then the price includes the entire order item quantity, not just the changed quantity.

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. Salesforce CPQ doesn't create subscriptions for contracted Percent of Total order products without any covered assets or subscriptions.

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.

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 these 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. (Salesforce CPQ Managed Package)

- Use Percent of Total Products in a Bundle

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. (Salesforce CPQ Managed Package)

- Allow Percent of Total Coverage for Net-New Products

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. (Salesforce CPQ Managed Package)

- Percent of Total Guidelines

Consider key guidelines when you're setting up a Percent of Total product. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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 to include it in price calculations for any percent of total products that cover it. Fixed price subscriptions are still included even when the Subscription package setting Include Net-New Products in Maintenance isn't selected. This field doesn't affect 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 Target	This field looks up to a product. When a covered asset has a Percent of Total Target value, the parent Percent of Total subscription product uses the target's list price rather than the covered asset's price. The percent of total subscription price calculation still includes other valid products on the quote. Salesforce CPQ supports percent of total target pricing only when the Percent of Total subscription product has a Percent of Total Base value of List. 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 diesel electrical generator'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.
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.

Use Percent of Total Products in a Bundle
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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

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.

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '15 and later

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
Consider key guidelines when you're setting up a Percent of Total product. (Salesforce CPQ Managed Package)

Available in: All CPQ Editions

General

Subscription Percent of Total products require a Subscription Type field of Percent of Total, and Pricing Method field of List. One-time Percent of Total products require a Pricing Method field of Percent of Total.

The prorate multiplier on the subscription for Percent of Total products is always 1.

Discounts

Non-Discountable Field	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.
Percent of Total Products with Contracted Percent Discount	When you add to a quote a Percent of Total product with a contracted percentage discount, Salesforce CPQ stores the discount value on the quote line's Special Price field.

Amendments and Renewals

Subscribed Asset Quantity on Renewal Quotes	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.
Percent of Total Constraint Support for Amendments	Salesforce CPQ doesn't support the Percent of Total Constraint field on amendment quotes.
Coverage of Asset Quote Lines When Contracts Are Amended or Renewed	When you amend or renew a contract, your original quote's percent of total subscriptions continue to cover their asset quote lines on the amendment or renewal quote. The amendment or renewal subscription still covers assets even if you changed a field on the asset product records that excluded them from the subscription's scope. For example, your amendment or renewal subscription still covers assets (that it covered on the original quote) if the

	assets had an active Exclude from Percent of Total field.
Additional Discounts on Quote Lines	Quote line additional discounts are also carried over to amendment quote lines. If a Percent of Total product's covered asset has an amount-based additional discount, the covered asset's amendment quote lines have negative total values on amendment quotes. If you use amendments, we recommend not applying amount-based additional discounts to any quote line that would become a covered asset.
Zero-Quantity Subscription Line	Suppose that an amendment causes a price change on a Percent of Total quote line. When you contract the amendment order's opportunity or quote, the resulting contract includes a subscription with a quantity of zero. This line indicates that the number of Percent of Total subscriptions didn't change.

Further Customization

You can use a few more fields to further customize your Percent of Total products.

Use of the Percent of Total Constraint Field	Percent of Total Constraint changes your Percent of Total product's price to its original list price when 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 have one quote where a customer orders many products that are used as the Percent of Total target.
Including and Excluding Subscriptions	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.
Use of the Percent of Total Scope Field	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.

Note: When a quote that contains a Percent of Total product is ordered using the Ordered checkbox, the estimated tax calculation is omitted on the order product. Activation doesn't fix the issue. The Tax Calculation Status is never set to Queued for Percent of Total products.

As a workaround, set Tax Status to Queued on the unactivated order product when it’s null. You can automate by using a platform event. The platform event that updates the Tax Status to Queued must also update another field on the order product at the same time to trigger the update. The Notes field is one example.

Evergreen Subscriptions in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ‘19 and later

- Set Up Evergreen Subscriptions

Enable evergreen subscriptions and create evergreen subscription products so that your sales reps can quote subscriptions without end dates. (Salesforce CPQ Managed Package)

- Quote and Manage Evergreen Subscriptions

You can manage your evergreen products and subscriptions to better report and track your evergreen business. (Salesforce CPQ Managed Package)

- Evergreen Subscription Fields

Your page layout and field-level security settings determine which fields are visible and editable on your contracted subscriptions. (Salesforce CPQ Managed Package)

- Guidelines for Evergreen Subscriptions

When working with evergreen subscriptions in Salesforce CPQ, consider the following. (Salesforce CPQ Managed Package)

Set Up Evergreen Subscriptions
Enable evergreen subscriptions and create evergreen subscription products so that your sales reps can quote subscriptions without end dates. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ‘19 and later

- Enable Evergreen Subscriptions

Configure Salesforce CPQ to support evergreen subscriptions. (Salesforce CPQ Managed Package)

- Create an Evergreen Subscription Product

Configure a product as an evergreen subscription product. (Salesforce CPQ Managed Package)

- Considerations for Setting Up Evergreen Products

When you set up evergreen products, keep these important considerations in mind. (Salesforce CPQ Managed Package)

Enable Evergreen Subscriptions
Configure Salesforce CPQ to support evergreen subscriptions. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ‘19 and later

1. In Salesforce CPQ package settings, select the Subscriptions and Renewals tab, and then select **Enable Evergreen Subscriptions**. Save your changes.

   Enabling this setting lets users select Evergreen or Renewable/Evergreen as a product’s subscription type. After selecting this setting, evergreen subscriptions can’t be disabled. If you want to prevent users from creating evergreen subscriptions, remove the Evergreen and Renewable/Evergreen picklist values from the Subscription Type field.

2. In Subscriptions and Renewals package settings, set or confirm your subscription term unit.

   You can use subscription term units of days or months. However, daily subscription term units aren't supported in Salesforce Billing.

   Salesforce CPQ automatically sets subscription terms to 1 on evergreen quote lines. This way, the quote line represents a daily or monthly unit price for your evergreen subscription.
3. Add the following picklist values to the product's Subscription Type field.
   - `Evergreen`
   - `Renewable/Evergreen`
4. Add the Subscription Type field to the quote line's Line Editor field set.

   When a product has a Renewable/Evergreen subscription type, sales reps can change the Subscription Type field between Renewable and Evergreen in the quote line editor.
5. Add the Evergreen field to your contract page layout.

   When a sales rep contracts an order or opportunity containing evergreen subscription products, Salesforce CPQ groups each evergreen subscription into its own contract. If a contract contains an evergreen subscription, Salesforce CPQ selects the contract's Evergreen field so that users can quickly see that the contract renews indefinitely until canceled.

Create an Evergreen Subscription Product

Configure a product as an evergreen subscription product. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '19 and later

1. Create a product and define its prices as needed.
2. Set the subscription term to 1.
3. In the Subscription Type field, select **Evergreen** or **Renewable/Evergreen**.
4. In the Subscription Pricing field, select **Fixed Price**.

Considerations for Setting Up Evergreen Products

When you set up evergreen products, keep these important considerations in mind. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '19 and later

- 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.
- If the Subscription Type field is set to Renewable/Evergreen, sales reps have to enter the default subscription term when switching from Evergreen to Renewable on the quote line.

Quote and Manage Evergreen Subscriptions

You can manage your evergreen products and subscriptions to better report and track your evergreen business. (Salesforce CPQ Managed Package)

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.

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.

If the Default Subscription Type field on Quote Line is Renewable/Evergreen from the Product2 record, the Subscription Type field on Quote Line defaults to Evergreen. If a sales rep changes the Subscription Type field from Evergreen to Renewable, they have to enter the appropriate subscription term. Otherwise it defaults to 1.

Note:

- Users can set the subscription term to null so it inherits the value from the quote. This action forces the effective subscription term to recalculate.
- If your product's subscription type is Renewable/Evergreen, the quote line's subscription type defaults to Evergreen. If it is changed to Renewable, the Subscription Term must also be set to null or to the actual subscription length for the quote line to recalculate correctly. (If Subscription Term or End Date are in the Quote Line Editor field set, the calculation happens correctly, and switching from Renewable to Evergreen works as expected.)
- If the product's Subscription Type field is left null and Subscription Pricing is populated, the product behaves as if it were a renewable subscription.

Evergreen products don't have end dates.

Salesforce CPQ sets an evergreen quote line's subscription term to 1. This way, based on your subscription term unit package settings, the quote line represents a daily, monthly, or yearly unit price that you can use for forecasting purposes. If you plan to invoice your evergreen subscriptions, remember that Salesforce Billing doesn't support daily subscription term units.

Manage Evergreen Order Products and Subscriptions

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

- Evergreen subscriptions are managed on their own contract. Evergreen and non-evergreen subscriptions can't be on the same contract.
- Standard renewable contracts have end dates, terms, and an option to renew. However, evergreen contracts don't have end dates.
- 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.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ‘19 and later

Fields Used for Evergreen Subscriptions

Master Evergreen Contract	This quote field determines which evergreen contract is tied to the quote. Used only in Salesforce CPQ for Sales Cloud.Use this field when adding net new subscriptions to an existing contract. Don’t use this field when combining multiple contracts into a single contract.
Master Evergreen Service Contract	This quote field determines which evergreen service contract is tied to the quote. Used only with Salesforce CPQ for Service Cloud. Use this field when adding net new subscriptions to an existing contract. Don’t use this field when combining multiple contracts into a single contract.
Evergreen	This field 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.
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 Term	Evergreen subscription products must have a subscription term of 1.
Subscription Type	This field 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

Product Subscription Type	Available Subscription Type
Renewable/Evergreen	Renewable Evergreen
Evergreen	Evergreen

Guidelines for Evergreen Subscriptions
When working with evergreen subscriptions in Salesforce CPQ, consider the following. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’19 and later

- Evergreen and Renewable products can’t coexist in a bundle.
- Products with a subscription type of Renewable/Evergreen can't be bundled.
- Before saving a new product option for a bundle, make sure that the Optional SKU has a valid subscription type.
- Standard subscriptions can’t have evergreen subscriptions as their renewal products.
- Price dimensions can’t be created for Evergreen and Renewable/Evergreen subscriptions.

Evergreen subscriptions don't support the following.

- The ability to partially amend a subscription. Evergreen subscriptions support only canceling or swapping subscriptions.
- Dynamic bundles with evergreen products.
- Renewals for asset-based models.

When you contract a quote with evergreen subscriptions, the evergreen subscription products are placed on the same contract. This organization takes precedence over the quote line group’s Separate Contract field.

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.

When you contract multiple opportunities at once, if each opportunity contains only evergreen subscriptions, Salesforce CPQ creates only one contract. If you want to create separate contracts for each opportunity, contract the opportunities individually.

Related concepts
Usage-Based Products in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Related information

Ordering Consumption Schedules with Evergreen Subscriptions

Usage-Based Products in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '19 and later

Salesforce CPQ and Salesforce Billing let you manage usage-based products with either consumption schedules or price schedules. For more information on managing usage with price schedules, check out Rating Usage with Price Schedules.

A product requires several field values to work with a consumption schedule. Several CPQ fields are required by default, and several Billing fields are also needed if you plan to invoice usage based on your consumption schedule in Salesforce Billing. The Billing fields are available only if you have the Salesforce Billing packaged installed.

CPQ Fields	• Subscription Pricing: Fixed Price • Charge Type: Recurring • Billing Type: Arrears • Subscription Term populated • Billing Frequency populated
Billing Fields	• Billing Rule populated • Tax Rule populated • Revenue Recognition Rule populated

- Defining Consumption Schedule Price Rates

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. (Salesforce CPQ Managed Package)

- Consumption Schedule Data Flow

Usage pricing begins when you associate a consumption schedule with a product. This association allows sales reps to review pricing in the quote line editor during quote development. As they move through the CPQ workflow, Salesforce CPQ creates unique consumption schedules each associated with the quote line, subscription, and order product made from that product. When you upload usage to a usage summary, Salesforce Billing rates and prices it based off the rates of the order product consumption schedule. (Salesforce CPQ Managed Package)

- Consumption Schedule Relationships

Salesforce uses a linking object, called a product consumption schedule, to define a relationship between the product and the consumption schedule. The product consumption schedule has a one-to-many relationship with products, which lets you associate multiple schedules with the same product. You can also associate one consumption schedule with several products. (Salesforce CPQ Managed Package)

- Enable Consumption Schedules for Salesforce CPQ and Billing

To use consumption schedules in Salesforce CPQ, enable them in Salesforce CPQ package settings. (Salesforce CPQ Managed Package)

- Create a Basic Usage Pricing Setup

Create a consumption schedule with one consumption rate, then link it to a usage product. (Salesforce CPQ Managed Package)

- Usage Pricing Guidelines

When you're setting up usage pricing for your products, consider key guidelines. (Salesforce CPQ Managed Package)

- Use Cases for Usage-Based Pricing

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. (Salesforce CPQ Managed Package)

- Viewing Consumption Schedules in the Quote Line Editor

When your quote line looks up to a consumption schedule, you can review the related schedule and its rates within the quote line editor. (Salesforce CPQ Managed Package)

- Contracting Products with Consumption Schedules

Contract an order to create subscription records for all of its order products that have consumption schedules. Salesforce CPQ also creates a subscription consumption schedule for each subscription. The subscription consumption schedule contains a lookup to the original product's consumption schedule. (Salesforce CPQ Managed Package)

- Amending Products with Consumption Schedule

When you amend a contract containing order products with consumption schedules and order the amendment quote, Salesforce Billing updates your usage summaries to reflect cancelations or new usage periods. (Salesforce CPQ Managed Package)

- Renewing Products with Consumption Schedules

When you renew a quote line for a usage-based subscription product, Salesforce CPQ creates a renewal quote with a quote line consumption schedule. The quote line consumption schedule looks up to the same consumption schedule as the original quote line. (Salesforce CPQ Managed Package)

- Consumption Rate Fields

Salesforce CPQ provides custom-managed fields for consumption rates. Consumption rates describe the billing rate for a tier in a consumption schedule. Page layout and field-level security settings determine whether fields are visible or editable. (Salesforce CPQ Managed Package)

- Consumption Schedule Fields

Salesforce CPQ provides various custom managed and standard fields for consumption schedules. A consumption schedule organizes a set of consumption rates by which usage-based products are quoted and billed. With certain page layout and field-level security settings, some fields aren’t visible or editable. (Salesforce CPQ Managed Package)

Related concepts

Guidelines for Evergreen Subscriptions

When working with evergreen subscriptions in Salesforce CPQ, consider the following. (Salesforce CPQ Managed Package)

Related information

Rating Usage Summaries With a Consumption Schedule

Invoicing Usage Summaries with Consumption Schedules

Defining Consumption Schedule Price Rates

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

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 uses to invoice this product.

You can create several rates on a schedule to represent increasing usage quantity boundaries with different prices.

A consumption rate’s lower bound represents the lowest quantity of usage that fits within the rate. A consumption rate’s upper bound is up to but not including the highest quantity of usage that fits within the rate. Lower bounds are inclusive, and upper bounds are exclusive. To set an unlimited upper bound for the last tier, set the upper bound to null.

In this example, a quantity of 251 is rated at $0.40 per unit (not the Rate 1 rate of $0.50, because upper bounds are exclusive). A quantity of 500.99 is also rated at $0.40 per unit (not the Rate 3 rate of $0.30, because lower bounds are inclusive).

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

Related information
Rating Usage Summaries With a Consumption Schedule
Invoicing Usage Summaries with Consumption Schedules

Consumption Schedule Data Flow
Usage pricing begins when you associate a consumption schedule with a product. This association allows sales reps to review pricing in the quote line editor during quote development. As they move through the CPQ workflow, Salesforce CPQ creates unique consumption schedules each associated with the quote line, subscription, and order product made from that product. When you upload usage to a usage summary, Salesforce Billing rates and prices it based off the rates of the order product consumption schedule. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

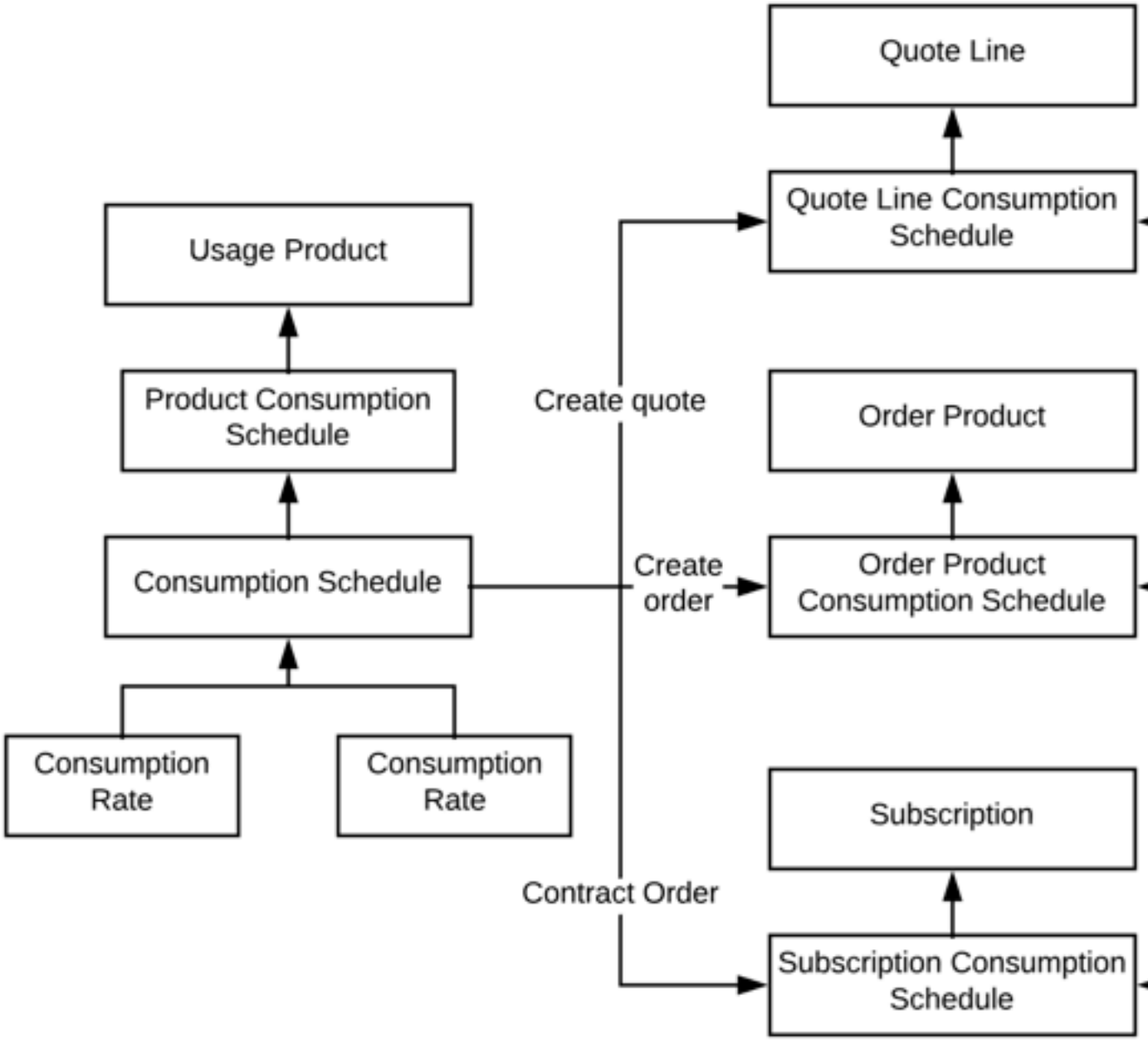
Consumption schedules are associated with a product through a linking object called the Product Consumption Schedule. You can create one from your product's Product Consumption Schedule related list, then give it a lookup to your desired consumption schedule. The product consumption schedule has a one-to-many relationship with products, which lets you associate multiple schedules with the same product. You can also associate one consumption schedule with several products. For more information, check out Consumption Schedule Relationships.

When you quote your usage product, Salesforce CPQ creates a quote line consumption schedule and quote line consumption rates and relates them to the resulting quote line.

When you order your quote, and when you contract an order, Salesforce CPQ also creates unique consumption schedules and rates for the resulting subscriptions and order products from your usage product. Each schedule and rate inherits its field values from the original consumption schedule and rates

related to your product. This way, you can track the values of the schedules and rates during each stage of your transaction.

Important: For changes to order product consumption rates and subscription consumption rates, you must use a custom action plugin. For existing quote line consumption rates, you can make inline edits or use a custom action plugin. Be aware that custom script changes do override any manual edits.



Note: Consumption schedules, consumption rates, and product consumption schedules are Salesforce objects. Quote line consumption schedules, order product consumption schedules, and subscription consumption schedules are Salesforce CPQ objects.

Related information

Rating Usage Summaries With a Consumption Schedule
Invoicing Usage Summaries with Consumption Schedules

Consumption Schedule Relationships

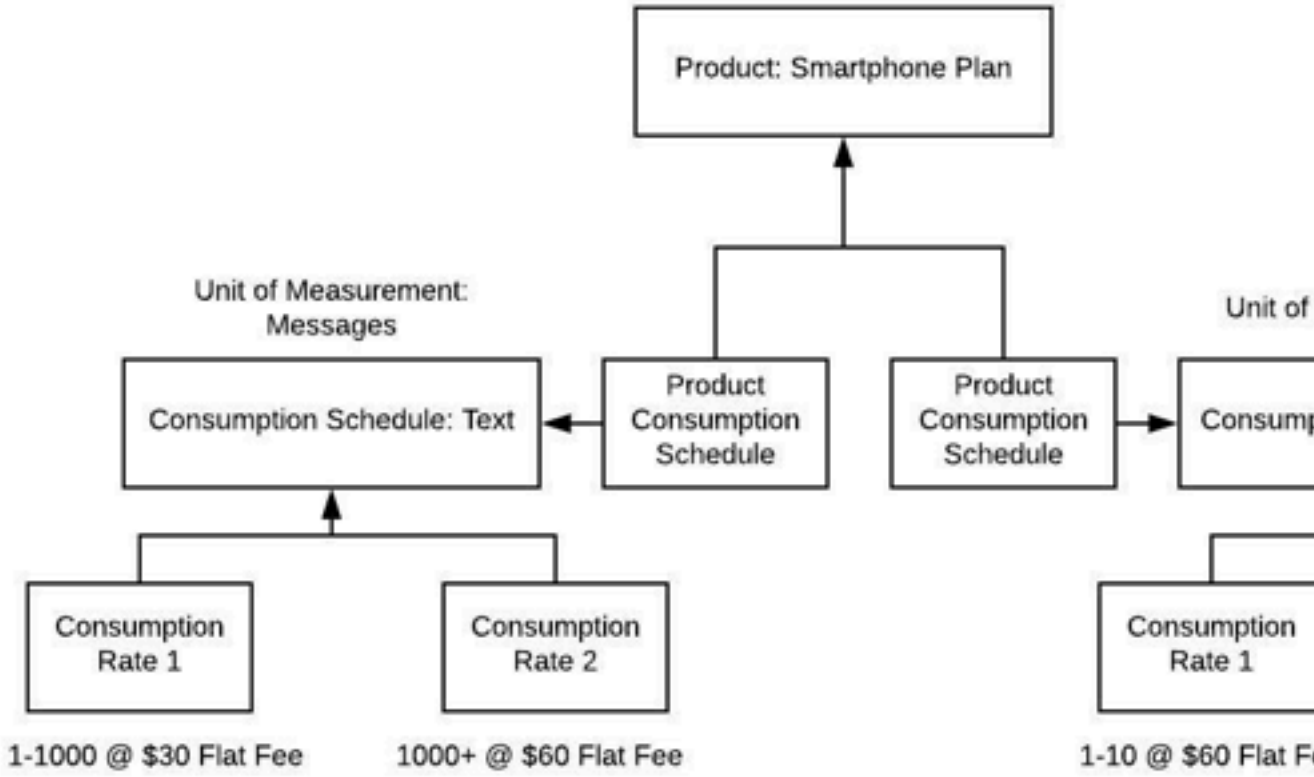
Salesforce uses a linking object, called a product consumption schedule, to define a relationship between the product and the consumption schedule. The product consumption schedule has a one-to-many relationship with products, which lets you associate multiple schedules with the same product. You can also associate one consumption schedule with several products. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

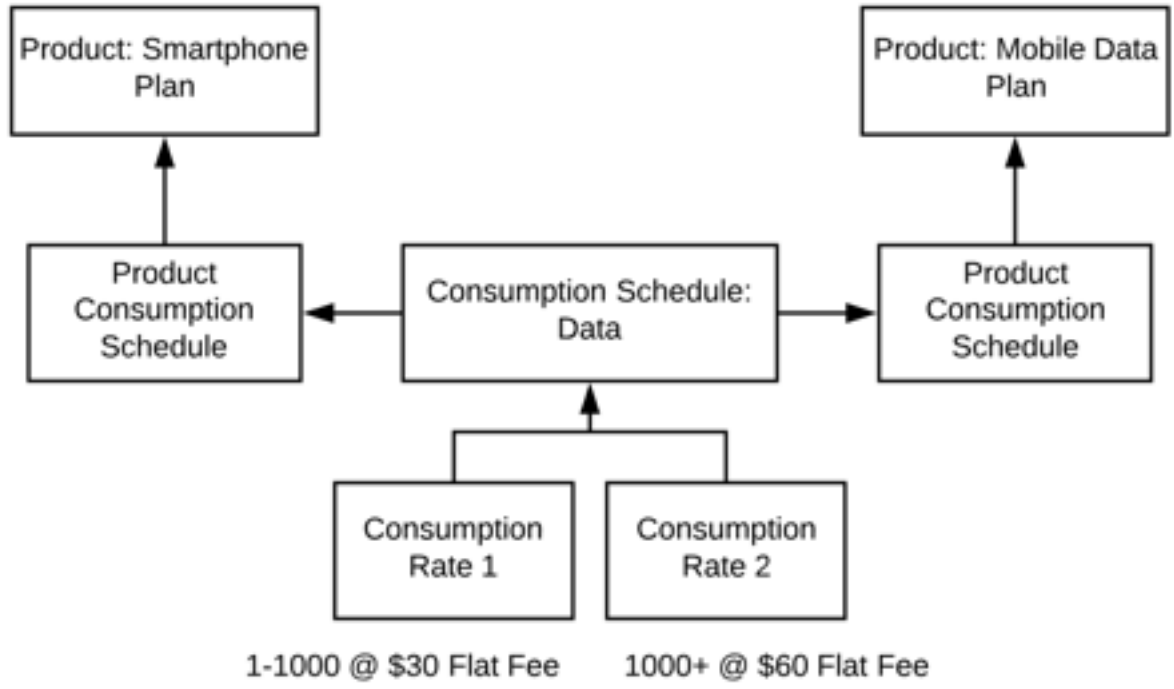
These limits apply to consumption schedules:

- A consumption schedule can include up to 100 product consumption schedules
- A product can include up to 100 product consumption schedules

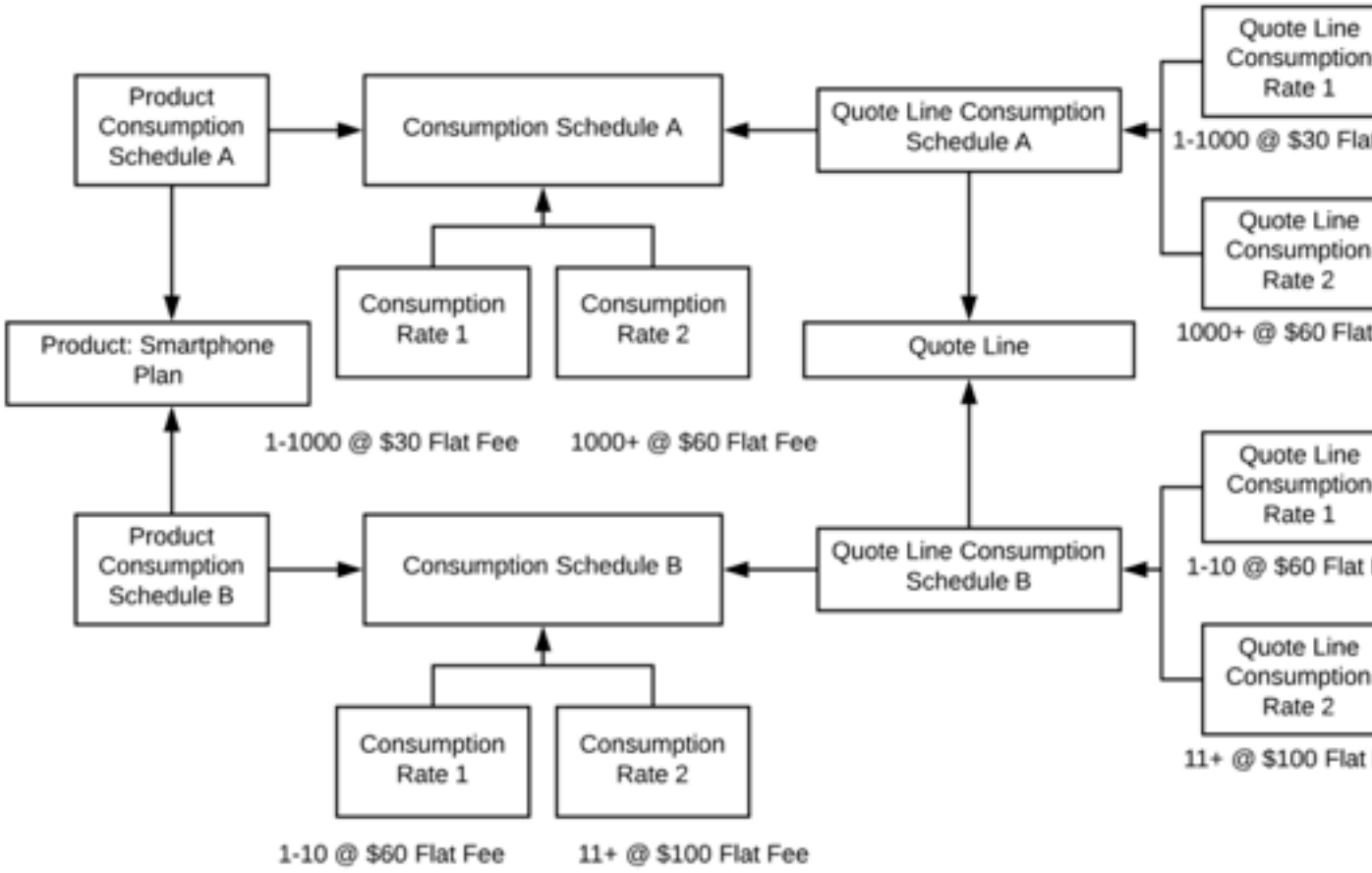
This structure is useful when you have a product associated with several different types of usage — for example, a phone data plan with usage-priced texting and usage-priced data consumption. Since both usage types have different units of measurements, you need two usage schedules. Let's take a quick look at how you can set this up.



You can also associate one consumption schedule with several products. This structure is useful when you have different products that still have the same usage pricing system.



When you quote, order, or contract this usage product, the resulting record receives one new consumption schedule for each consumption schedule on the original product. For example, let's say a sales rep quoted the phone plan. Salesforce CPQ creates quote line consumption schedules from the original consumption schedule and associates them both with the resulting quote line. You can access them from your quote line's Quote Line Consumption Schedule related list.



Enable Consumption Schedules for Salesforce CPQ and Billing
To use consumption schedules in Salesforce CPQ, enable them in Salesforce CPQ package settings. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '19 and later

1. Enable usage-based pricing in Salesforce CPQ package settings.
   a) From setup, enter `Installed Packages`, and then select **Installed Packages**.
   b) Find the Salesforce CPQ package and click **Configure**.
   c) Select the Pricing and Calculation tab.
   d) Select the Enable Usage Based Pricing field.

2. Make sure that users who need consumption schedules have Create, Read, Edit, and Delete permissions for the following objects.
   - Consumption Schedule
   - Contract Line Item Consumption Schedule (Service Cloud for Salesforce CPQ only)
   - Contract Line Item Consumption Rate (Service Cloud for Salesforce CPQ only)
   - Localizations (if your org uses CPQ translations)
   - Order Product Consumption Schedule
   - Order Product Consumption Rate
   - Quote Line Consumption Schedule
   - Quote Line Consumption Rate
   - Subscription Consumption Schedule (Not needed for Service Cloud for Salesforce CPQ)
   - Subscription Consumption Rate (Not needed for Service Cloud for Salesforce CPQ)

Create a Basic Usage Pricing Setup
Create a consumption schedule with one consumption rate, then link it to a usage product. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

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.
   g) Select a billing rule, tax rule, and revenue recognition rule. When you order a product related to this consumption schedule, the resulting order product consumption schedule inherits these rules. Salesforce Billing uses these rules to manage billing and invoicing for your usage summaries.
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
When you're setting up usage pricing for your products, consider key guidelines. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '19 and later

- Products with consumption schedules can't have price dimensions.
- Clicking Clone with Related on a product with consumption schedules won't clone the consumption schedules on the cloned product.
- To use products with consumption schedules in Salesforce CPQ and Salesforce Billing, make sure both packages are on the same major release version, such as Summer '19.
- Quote lines with consumption schedules can have a quantity of only one. When amending or renewing, you can change the quantity from one to only zero.
- Products with consumption schedules don't support renewal pricing.
- 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.
- Usage processing orders can be negative.
- All of a schedule's consumption rates must have unique usage processing orders.
- As of Salesforce CPQ Spring '20, if your org is set to allow inline edits, the upper bound, lower bound, and price fields can be edited in the quote line editor.

Use Cases for Usage-Based Pricing
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '19 and later

- Use Pricing Use Case: Shared Consumption Schedules

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. (Salesforce CPQ Managed Package)

- Usage Pricing Use Case 2: Usage Pricing for Scaled Services

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. (Salesforce CPQ Managed Package)

Use Pricing Use Case: Shared Consumption Schedules

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

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: Messages 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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

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 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
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

Viewing Consumption Schedules in the Quote Line Editor
When your quote line looks up to a consumption schedule, you can review the related schedule and its rates within the quote line editor. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

To review a quote line’s consumption schedule, find the line in the quote line editor and click . Salesforce shows a page with the details of the related consumption schedule and its rates. For each rate, you can move your cursor over the related consumption schedule’s name to show additional information about the consumption schedule.

As of Salesforce CPQ Spring ‘20, if your org is set to allow inline edits, the upper bound, lower bound, and price fields can be edited in the quote line editor.

- Enable Manual Edits for Quote Line Consumption Schedules

To make inline edits to consumption rates for usage-based products in the quote line editor, enable editing in Salesforce CPQ package settings. This allows manual edits to the upper bound, lower bound, and price. (Salesforce CPQ Managed Package)

- Change Fields in the Consumption Schedule Visualforce Page

Change the consumption schedule fields that appear when you move your cursor over the consumption schedule’s name in each row of consumption rates. (Salesforce CPQ Managed Package)

Enable Manual Edits for Quote Line Consumption Schedules
To make inline edits to consumption rates for usage-based products in the quote line editor, enable editing in Salesforce CPQ package settings. This allows manual edits to the upper bound, lower bound, and price. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '20 and later

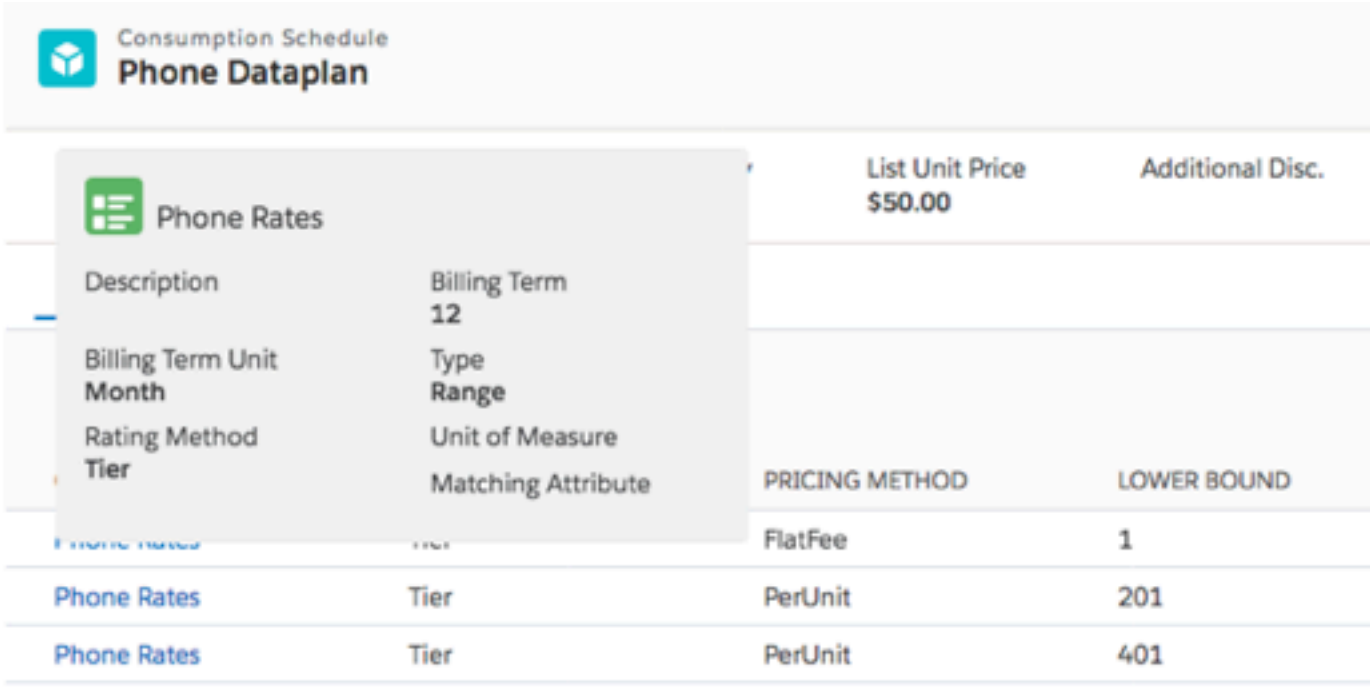
1. Enable usage-based pricing in the Salesforce CPQ package settings and assign permissions as shown in. Enable Consumption Schedules for Salesforce CPQ and Billing.
2. Enable manual edits.
   a) From setup, enter `Installed Packages`, and then select **Installed Packages**.
   b) Find the Salesforce CPQ package and click **Configure**.
   c) Select the Pricing and Calculation tab.
   d) Select the Enable Manual Edits for Usage Based Pricing field.

Change Fields in the Consumption Schedule Visualforce Page
Change the consumption schedule fields that appear when you move your cursor over the consumption schedule's name in each row of consumption rates. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '19 and later

When you click on a quote line with a related consumption schedule, Salesforce CPQ shows a Visualforce page with that consumption schedule's important fields. You can view more fields by moving your cursor over the consumption schedule's name in each row of consumption rates.

1. From Setup, in the Quick Find box, enter `Consumption Schedules`, and then click **Field Sets**.
2. Find the Compact Layout field set and click **Edit**.
3. Add and remove your fields as needed.



Contracting Products with Consumption Schedules
Contract an order to create subscription records for all of its order products that have consumption schedules. Salesforce CPQ also creates a subscription consumption schedule for each subscription. The subscription consumption schedule contains a lookup to the original product's consumption schedule. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '19 and later

Important: You can contract products with consumption schedules only by contracting an order. Salesforce CPQ doesn't allow contracting an opportunity that contains products with consumption schedules, even if the opportunity contains non-usage products.

Amending Products with Consumption Schedule
When you amend a contract containing order products with consumption schedules and order the amendment quote, Salesforce Billing updates your usage summaries to reflect cancelations or new usage periods. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

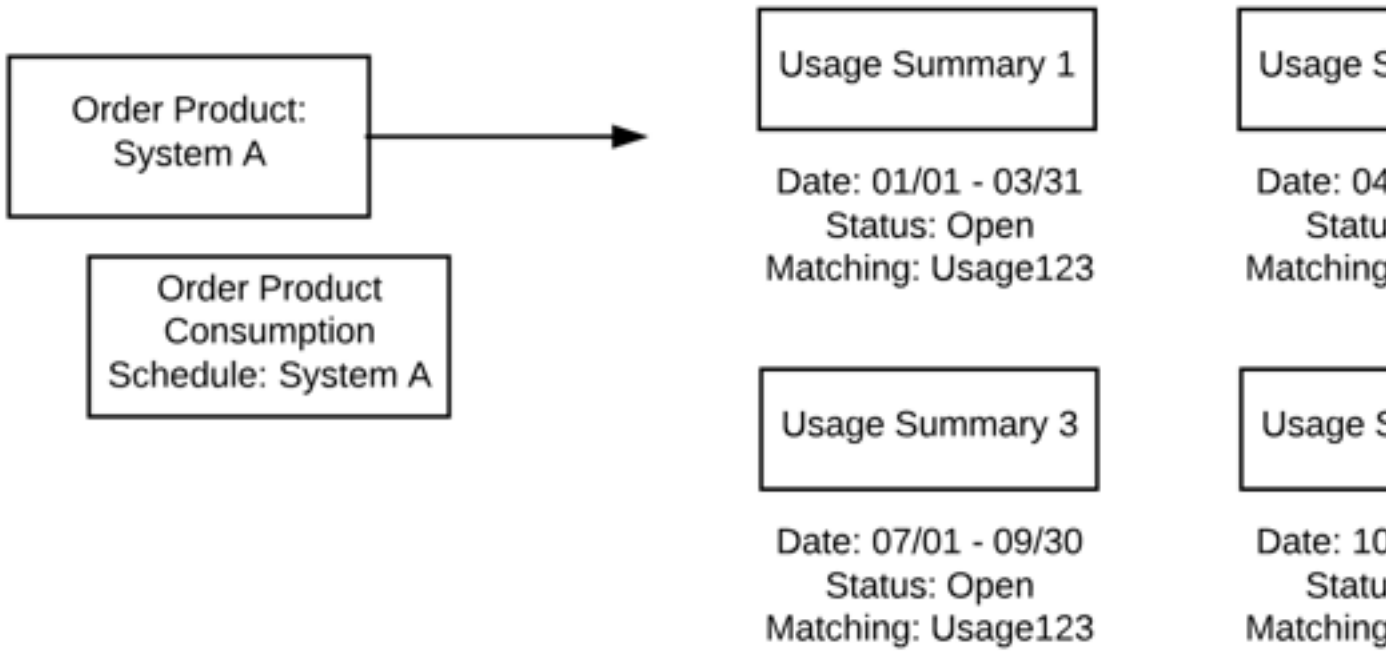
By default, Salesforce CPQ supports only replacements and cancelations for amended products with consumption schedules. Other amendment functions, such as increasing the quantity of a product with a consumption schedule, must be managed by the partner. To cancel a product with a consumption schedule, reduce the product's quantity to zero. To replace a product with a consumption schedule, reduce the product's quantity to zero and then add another quote line for a different product with a consumption schedule

Important: A quote line for a product with a consumption schedule can’t have a quantity greater than one.

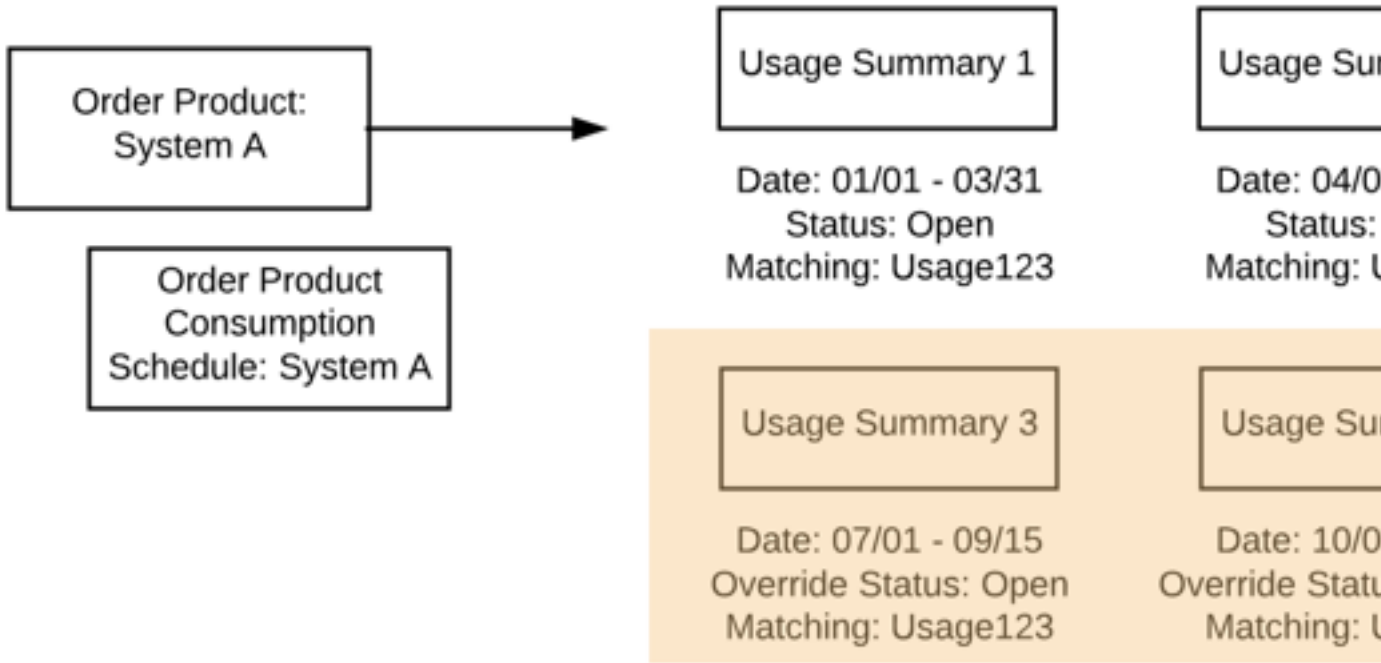
When you order your amended quote, Salesforce Billing performs the following actions based on the type of amendment you performed.

- If you replaced an order product for a new one, Salesforce Billing creates usage summaries for your remaining billing periods on the new order product. The matching IDs for these usage summaries must equal the matching ID on your replacement order product's order product consumption schedule. We recommend managing this process with automation such as a process builder.
- If you canceled your original order product, Salesforce Billing doesn't create more usage summaries for it.

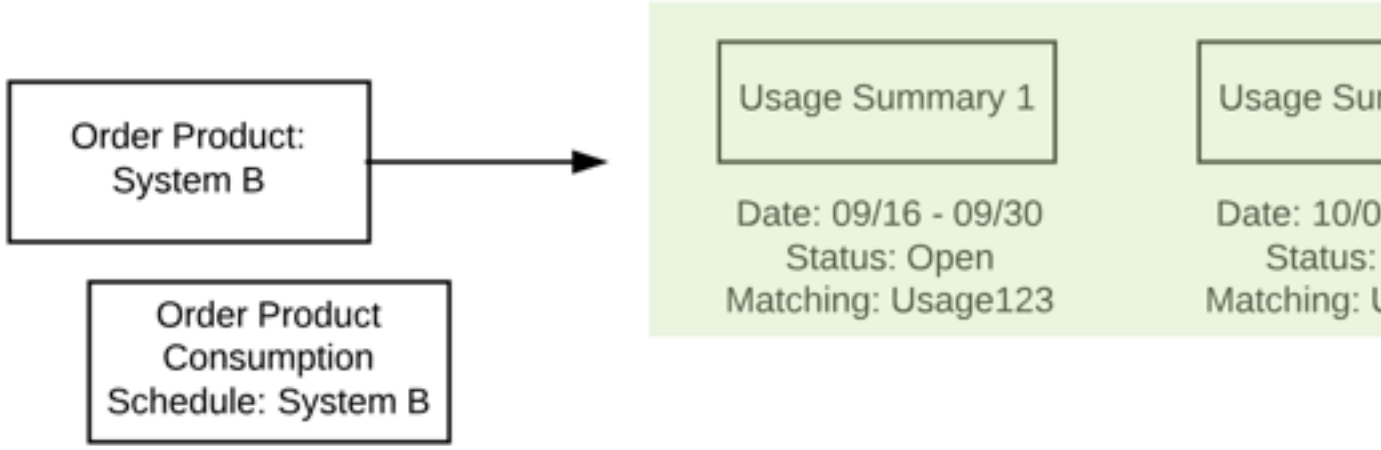
You sell a business security monitoring and response system. One of your customers has an order for the system that runs for 01/31/18 through 12/31/18, billed quarterly. The system's order product has an order product consumption schedule with a one-quarter billing term. This setup creates an order product with four usage summaries.



Your customer amends their contract on 09/15 and replaces the original system with a different version. After ordering your amendment quote, Salesforce CPQ updates the original order product's third and fourth usage summaries. The third usage summary changes its start and end date to match the partial period. Both usage summaries get a value for their Override Status fields; the third summary's stays open while the fourth summary's is closed.



Salesforce CPQ then creates two more usage summaries for your new order product. The first new usage summary represents the period from the amendment through the end of the quarter. The second new usage summary represents the fourth quarter. As long as your usage and usage summaries have the proper matching values with the new consumption schedule, you can continue uploading and rating usage for your new system's order product.



Renewing Products with Consumption Schedules
When you renew a quote line for a usage-based subscription product, Salesforce CPQ creates a renewal quote with a quote line consumption schedule. The quote line consumption schedule looks up to the same consumption schedule as the original quote line. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’19 and later

Important:

- Usage product quote lines can’t have quantities above one.
- The product's Renewal Product field can't target a product with a consumption schedule.

Consumption Rate Fields
Salesforce CPQ provides custom-managed fields for consumption rates. Consumption rates describe the billing rate for a tier in a consumption schedule. Page layout and field-level security settings determine whether fields are visible or editable. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions in Winter ’19 and later versions

Field	API Name	Data Type	Definition
Consumption Rate Name	Name	Auto Number	The name of this consumption rate.
Consumption Schedule	ConsumptionScheduleId	Master-Detail (Consumption Schedule)	The consumption schedule that the rate is part of.
Created By	CreatedById	Lookup (User)	The user who created this consumption rate.

Field	API Name	Data Type	Definition
Created Date	CreatedDate	Date/Time	Date and time the consumption rate was created.
Description	Description	Long Text Area (32,000)	Description of the schedule.
Last Modified By	LastModifiedById	Lookup (User)	The user who last edited the rate.
Last Modified Date	LastModifiedDate	Date/Time	The date and time the rate was last edited.
Lower Bound	LowerBound	Number (9, 0)	The lowest quantity of usage for the consumption rate.
Price	Price	• Single-Currency Org: Currency (11, 2) • Multicurrency Org: Currency (11, 7)	The price for usage that falls within the consumption rate's bounds.
Pricing Method	PricingMethod	Picklist	Per unit or flat fee.
Processing Order	PricessingOrder	Number (9, 0)	The order for processing the usage rate across multiple rates. Processing order values can be positive or negative. Salesforce CPQ evaluates consumption rates beginning with the lowest processing order.
UpperBound	UpperBound	Number (9, 0)	The highest quantity of usage for the consumption rate.

Related reference

Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it's important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

Consumption Schedule Fields

Salesforce CPQ provides various custom managed and standard fields for consumption schedules. A consumption schedule organizes a set of consumption rates by which usage-based products are quoted and billed. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '19 and later

Field	API Name	Data Type	Definition
Active	IsActive	Checkbox	If selected, this schedule is active

Field	API Name	Data Type	Definition
Billing Rule	blng__BillingRule__c	Lookup(Billing Rule)	Salesforce Billing invoices usage summaries based off their related consumption schedule's billing rule.
Billing Term	BillingTerm	Number(9,0)	The number used with the billing term unit to determine billing frequency
Billing Term Unit	BillingTermUnit	Picklist	The unit used with the billing term to determine billing frequency
Category	SBQQ__Category__c	Picklist	You can define custom categories to organize consumption schedules in separate tabs on sales rep UI. If you do this, make sure to create a field set for each category.
Created By	CreatedById	Lookup(User)	The user who created this consumption schedule
Consumption Schedule Name		Text(255)	The name of the consumption schedule
Description	Description	Long Text Area(32000)	Description of the schedule
Created Date	CreatedDate	Date/Time	Date and time the consumption schedule was created
Last Modified By	LastModifiedById	Lookup(User)	The user who last edited the consumption schedule
Last Modified Date	LastModifiedDate	Date/Time	The date and time the schedule was last edited
Matching Attribute	MatchingAttribute	Text(255)	Usage is matched with a consumption schedule if the records share the same Matching Attribute value
Rating Method	Rating Method	Picklist	A specific use case to rate usage against the schedule. The controlling picklist for the Type field

Field	API Name	Data Type	Definition
Revenue Recognition Rule	blng__RevenueRecognitionRule__c	Lookup(Revenue Recognition Rule)	Salesforce Billing recognizes usage summary revenue based off the summary's related revenue recognition rule.
Tax Rule	blng__TaxRule__c	Lookup(Tax Rule)	Salesforce Billing taxes usage summary invoice lines based off the summary's related tax rule.
Type	Type	Picklist	Defines how rate tiers are calculated. - Range: The schedule prices only using the tier that applies to the usage quantity - Slab: Usage within a given bound receives pricing equal to its tier's value
Unit of Measure	UnitOfMeasure	Picklist	Usage quantities and rates apply to the unit of measurement

Related reference

Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it's important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

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 in Salesforce CPQ

Apply various discounts or markups to customize pricing on your products. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Note: To get started, explore Pricing Methods for Salesforce CPQ on Trailhead.

- Product Pricing Overview for Salesforce CPQ

Salesforce CPQ provides several types of pricing discounts that sales reps can apply to their quote lines. Learn how and when the discounts are applied. (Salesforce CPQ Managed Package)

- Block Pricing in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Cost-and-Markup Pricing in Salesforce CPQ

Set a price based on its cost plus a markup amount, rather than list price and discount. (Salesforce CPQ Managed Package)

- Batch Pricing in Salesforce CPQ

Price component and accessory bundle product options by static amounts based on quantity ranges. (Salesforce CPQ Managed Package)

- Contracted Pricing in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Pricing Permissions in Salesforce CPQ

Depending on your settings and your company's internal processes, it can be necessary to customize pricing permissions for your users. (Salesforce CPQ Managed Package)

Product Pricing Overview for Salesforce CPQ

Salesforce CPQ provides several types of pricing discounts that sales reps can apply to their quote lines. Learn how and when the discounts are applied. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ editions.

On a single quote line, you can apply discretionary discounts, partner discounts, discount schedules, and custom discounts. There are eight price fields included in Salesforce CPQ, and quote lines calculate each of these price fields in a specific order.

Salesforce CPQ includes the price fields so that you can track the calculations that occur after each discount or uplift is applied to a quote line. These fields also give you the flexibility to build automation that allows your pricing changes to occur exactly when and where you want.

The fields included on the Salesforce CPQ quote line object are:

- Contracted Price
- Customer Unit Price
- List Unit Price
- Net Unit Price
- Original Price
- Partner Unit Price
- Regular Unit Price
- Special Price

Each of the unit price fields represents the value after a calculation has occurred.

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. If you select a product's or quote line's Price Editable field, you can override the list price in the quote line editor. The Pricing Method field in the product record is set to List by default, but you can change the pricing method to Cost or Block pricing.

Make sure that you review the Salesforce CPQ pricing method so that you can track pricing calculations. You can identify the price before a discount is applied, the price before proration, and more. You also have control over custom calculations, such as using a price rule to change a price to one of the fields in the chart.

Salesforce CPQ uses the following method to calculate the net price for a quote line.

Price and Discount	Description
List Unit Price	The list unit price inherits this product's price book entry by default.
Contracted Price (if any)	If the quote line has an associated contracted price on the account, the contracted price overrides the list unit price.
Special Price	The special price is inherited from the contracted price, a custom price set by the Salesforce admin, or the list price. Pricing calculations start with this value.
Prorate Multiplier	The prorate multiplier is the subscription term divided by the default term.
Prorated List Price	The price after the prorate multiplier is applied to the list price.
Volume Discount Schedules	The volume discounts set on the quote line.
Option Discounts	The discounts on the product option record.
Term Discount Schedules	The discount schedules based on subscription product terms.
Discount Schedules	If the quote line has discount schedules, Salesforce CPQ applies the appropriate discount to the prorated price. The resulting value becomes the regular unit price.
Regular Unit Price	The unit price before additional discount. If it's a special price, the type is overridden with Special Price.
Additional Discounts	The discounts entered by the sales rep or using price rules.
Customer Unit Price	The net price before partner discounts. Calculated by applying discretionary discounts to the regular unit price.
Partner Discounts	Discounts entered by sales reps or using price rules.
Partner Unit Price	The partner price is the customer unit price with a partner discount applied.
Distributor Discounts	The discounts entered by sales reps or using price rules.
Net Unit Price	The net price is the unit price after all discounts are applied.

Your company rents computer monitors at a list unit price of $120 per month. You have an agreement with PartnersRUs, at a contracted price of $100/month per unit. PartnersRUs wants to purchase a 12-month subscription and to negotiate a discounted price.

Price and Discount	Action	Value
List Unit Price	The list unit price is pulled from the price book entry.	$120

Price and Discount	Action	Value
Contracted Price	The contracted price is pulled from the account, and overrides the list unit price.	$100
Special Price	The special price is inherited from the list price.	$100
Prorate Multiplier	The prorate multiplier is calculated by dividing the subscription term by the default term. 12 ÷ 1 = 12 The prorate multiplier is applied to the special price.	$100 × 12 = $1,200
Prorated Unit Price		$1,200

PartnersRUs wants to buy 100 new monitors. Your system admin configured a discount schedule with a 10% discount for purchasing more than 99 monitors.

Price and Discount	Action	Value
Prorated Unit Price		$1,200
System Discounts	A 10% discount is applied using price rules.	-$120
Regular Price		$1,080

While PartnersRUs is happy with the bulk discount, they reveal that your competitor's price is still much lower. So, you offer PartnersRUs an extra 10% discount and the 5% partner discount.

Price and Discount	Action	Value
Regular Unit Price		$1,080
Additional Discount	A 10% discount is entered by the sales rep.	-$108
Customer Unit Price		$972
Partner Discount	A 5% discount is applied using price rules.	-$48.60
Partner Unit Price		$923.40

PartnersRUs isn't a distributor, so you can't add distributor discounts to their quote. The full calculation for the net total is shown in this chart.

Price and Discount	Action	Value
List Unit Price	The list unit price is pulled from the price book entry.	$120
Contracted Unit Price	Pulled from the account, and overrides the list unit price	$100
Special Price	The special price is inherited from the list price.	$100

Price and Discount	Action	Value
Prorate Multiplier	The prorate multiplier is calculated by dividing the subscription term by the default term. 12 ÷ 1 = 12 The prorate multiplier is applied to the special price.	$100 × 12
Prorated Unit Price		$1,200
System Discounts	A 10% discount is applied using price rules.	-$120
Regular Unit Price		$1,080
Additional Discount	A 10% discount is entered by the sales rep.	-$108
Customer Unit Price		$972
Partner Discount	A 5% discount is applied using price rules.	-$48.60
Partner Unit Price		$923.40
Distributor Discount	none	$0.00
Net Unit Price		$923.40

Related concepts

Contracted Pricing in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Block Pricing in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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 1–10 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.

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. Salesforce CPQ also sets the quote line's effective quantity to 1. When the sales rep syncs the quote with an opportunity, the resulting opportunity product has a quantity of 1.

Important:

- Up to 50 block-pricing tiers are supported.

- Block pricing isn't compatible with an asset conversion of One per Unit.
- Amending a product with a custom block price quantity isn't supported.

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 isn't 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 price 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.

Note:

- The snapshot information fields on a block price are no longer supported.
- Sales reps with read-only access to block price and its fields can create block prices by cloning an existing record. To prevent them from creating or modifying block prices, remove the Clone button from the page layout or remove the sales rep's user access to the EditBlockPrices custom page.
- When multiple currencies are activated, block price products must have a Block Price record for each currency. If a Block Price record doesn't exist for the quote's currency, the block price product isn't available in product selection and configuration.

  In a block price product's Block Price related list, click **Edit All**. Add values for the newly added currencies and save your changes. A Block Price record now exists for each currency value in the Block Price related list.
- For block pricing, the upper bound and lower bound lengths and decimals places are (12,0). However, for the Quote Line Quantity field (SBQQ__Quantity__c), the decimal places are (10,2). An error occurs when the customer inputs a quantity in the billions: "Quantity: value outside of valid range on numeric field: 1.0E10."

Related information

Knowledge article: Apply a per unit price within Block Price Tiers in Salesforce CPQ
Knowledge article: Updates to CPQ Discount Schedules and Block Price Tiers Can Modify Saved Quotes

Cost-and-Markup Pricing in Salesforce CPQ

Set a price based on its cost plus a markup amount, rather than list price and discount. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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.

Important:

- Salesforce CPQ can’t evaluate more than 50,000 cost records at a time.
- Salesforce CPQ ignores the Special Price field for cost-priced products.

Batch Pricing in Salesforce CPQ
Price component and accessory bundle product options by static amounts based on quantity ranges. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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 sales rep configures a batch-priced product option, they can adjust its quantity. Salesforce CPQ divides the product option's quantity by its batch quantity and uses that value for the resulting quote line's quantity. For example, a $500 App License product option has a batch quantity of 4, and your sales rep enters a quantity of 8 for that product option in the configurator. The resulting quote line has a quantity of 2 and a net total of $1000. If the division makes a fractional number, Salesforce CPQ uses the next-highest whole number for the quote line's quantity.

Sales reps can also edit a batch-priced quote line's batch quantity in the quote line editor. Salesforce CPQ will recalculate the quote line's quantity and net total based on the new batch quantity. If we changed the batch quantity for our App License to 2, the quote line's quantity updates to 4 and its net total changes to $2000.

Changes to the bundle parent's quantity don't affect the batch quantity of child product options.

Note: Batch pricing is available only for product options. If you apply batch pricing to a product and set that product as a standalone product or bundle parent, Salesforce CPQ ignores its batch price values in the quote line editor.

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 in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’16 and later

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 can 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.

Note: If a contracted price record is associated with any line item in a quote, a DML operation is performed during price calculation. The quote line gets inserted and then deleted (rolled back).

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Related concepts

Product Pricing Overview for Salesforce CPQ

Salesforce CPQ provides several types of pricing discounts that sales reps can apply to their quote lines. Learn how and when the discounts are applied. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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.

Salesforce CPQ doesn't create a contracted price under the following circumstances.

- The product is present in two or more quote lines, where each quote line has a different price or discount schedule.
- The product exists as an MDQ product with different discount schedules in two or more segments.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '16 and later

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 can provide either a Price value or a Discount value.
   - Price: Quote lines for the product set their list price to this value.
   - Discount: Quote lines for the product calculate their list price by applying this discount percentage to their price book entry. This calculation ignores any block prices on the product.
3. To apply the contracted price during certain dates, enter values in the Effective Date and Expiration Date fields.
4. 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.

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. On the server management package product, 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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’16 and later

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.
Description	The description of the contracted price. This description is copied into the special price description of quote line items that use this price.
Discount	The discount percentage that your sales rep negotiated with their customer. During quote line list price calculation, Salesforce CPQ applies this discount to the product’s price book entry. Salesforce CPQ ignores any block pricing on the product. 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 price book 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

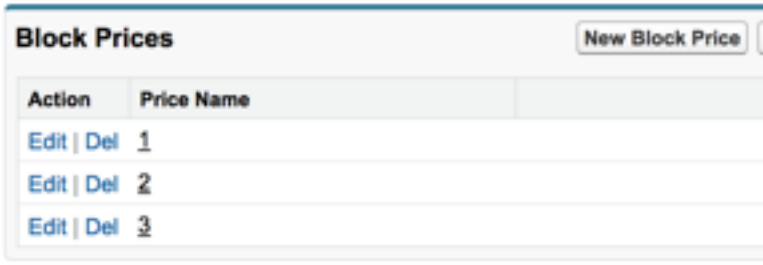
	uses the product's contracted price instead of the product's price book price.
Filter Field	The quote line field that's evaluated to determine whether this contracted price applies.
Filter Value	The value that the filter field is tested against to determine whether this contracted price applies.
Non Discountable	Salesforce CPQ prevents further discounting for the product related to this contracted price.
Operator	The operator that's used to evaluate the Filter Field value against Filter Value.
Original Quote Line	The quote line that originated 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

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.



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.
Negative Quote Lines	Negative quote lines always have an effective quantity of 1.

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. (Salesforce CPQ Managed Package)

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.

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 doesn't support changing a product's pricing method after you add it to a quote.
- Salesforce CPQ overrides the quote line's list unit price with the custom price. To allow sales reps to track the quote line's original price, the Original Price field can be added to a custom Quote Line line editor field set. Note that this field cannot be added to default CPQ line editor field sets. Original Price always displays the price book value of the product for your quote line. We recommend not editing 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.

Pricing Permissions in Salesforce CPQ
Depending on your settings and your company's internal processes, it can be necessary to customize pricing permissions for your users. (Salesforce CPQ Managed Package)

Products and Pricing

Action	Read	Create	Edit	Delete	Notes
Users creating Quotes	• Opportunity • Quote • Quote Document • Quote Lines • Quote Line Groups • Quote Templates • Template Sections • Template Content	• Quote • Quote Document • Quote Lines • Quote Line Groups	• Opportunity • Quote • Quote Document • Quote Lines • Quote Line Groups	• Quote • Quote Document • Quote Lines • Quote Line Groups	None
Deleting quote lines in the quote line editor	None	None	None	• Quote Line	
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
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

Action	Read	Create	Edit	Delete	Notes
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
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
Sales Reps with the ability to group line items	• Quote Line Groups	• Quote Line Groups	• Quote Line Groups	• Quote Line Groups	None

Action	Read	Create	Edit	Delete	Notes
Contract an Opportunity	• Asset		• Asset		Even if the opportunity or order doesn't contain any one-time products (and doesn’t produce any assets after contracting), users still need read and write permissions on the asset object in order to contract.
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

Summary Variables

Summarize number field information about products into a single object called a summary variable. You can reference a summary variable in price conditions, price actions, product rule error conditions, quote term conditions, and other summary variables. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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:

- Sum: Add all values in the aggregate field together
- Average: Calculate the average of all the aggregate field's values
- Min: Find the lowest of all the aggregate field's values
- Max: Find the highest of all the aggregate field's values
- Count: Count the number of records that meet the filter criteria

The Aggregate Field represents the field where you're performing the function. This field must 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.

You can reference summary variables in the following areas:

Price Rules	Use a summary variable as a tested variable or filter variable in a price condition. Use a summary variable as a price action's source variable to update quote and quote line fields.
Product Rules	Use a summary variable as a tested variable or filter variable.
Quote Terms	Use a summary variable as a tested variable.
Summary Variable	Reference a summary variable in another summary variable's Variable Element field. You can take the results of your aggregate function and perform another operation on them using the composite operator and the variable element.

Important:

- Product-scoped product rule error conditions and configurator-scoped price rules can't use summary variables that target quote lines.
- The summary variable's Scope field has been deprecated. Use the Target Object field to reference the object that your summary field evaluates.
- When you're using features with the option selection method set to Dynamic, selected products aren't considered product options by product or price rules, unless the Dynamic feature is the child of a product option.

You must 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. (Salesforce CPQ Managed Package)

- Guidelines for Summary Variables

Review important guidelines for evaluating fields in summary variables. (Salesforce CPQ Managed Package)

- Summary Variable Fields

Summary variables perform a math function on the collected values of a number field on the quote line, product option, subscription, or asset. You can also create filters so that the summary variable evaluates only fields on records that match the filter values. After your calculations are done, you can reference the summary variable in your quotes, quote line fields, and product rules. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’15 and later

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 Total_Quantity__c.
2. Create a quote field with a label of Hardware Total and an API Name of 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.

- 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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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.

Guidelines for Summary Variables

Review important guidelines for evaluating fields in summary variables. (Salesforce CPQ Managed Package)

- When a summary variable’s aggregate field or search filters don’t return any quote lines, the Max and Min aggregate functions return a null value. All other aggregate functions return 0.
- If a summary variable uses composite operators to perform a math function against a null variable element, the function always returns a null value.
- If a price action sends a null summary variable to its target field, the target field’s value also becomes Null.

- Product Code and Product Family are available by default as filter field values. Type and Status are available by default as constraint fields. You can add new picklist values for other fields as needed.

Summary Variable Fields
Summary variables perform a math function on the collected values of a number field on the quote line, product option, subscription, or asset. You can also create filters so that the summary variable evaluates only fields on records that match the filter values. After your calculations are done, you can reference the summary variable in your quotes, quote line fields, and product rules. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '15 and later

Many summary variable fields depend on other fields on the summary variable object. We've listed them here in order that Salesforce CPQ uses when calculating the summary variable's result.

Field	**Description**
Target Object	The object containing the number field that you want to evaluate.
Aggregate Function	The type of math function that the summary variable performs on the aggregate field values. • Sum: Add all values in the aggregate field together • Average: Calculate the average of all the aggregate field's values • Min: Find the lowest of all the aggregate field's values • Max: Find the highest of all the aggregate field's values • Count: Count the number of records that meet the filter criteria When a summary variable's aggregate field and/or search filters don't return any records, the Max and Min aggregate functions return a null value, while all other aggregate functions return 0.
Aggregate Field	The aggregate function performs math on the aggregate field. For example, you could set your target object to Quote Line and the aggregate field to List Price. If your aggregate function is Add, Salesforce CPQ adds up the values of all list prices on your quote. When you reference your summary variable, it returns the combined value of list prices on your quote lines. Always make sure your aggregate field exists on your target object. Otherwise, your summary variable returns null or 0 depending on its aggregate function.

Field	Description
Composite Operator	The math function used in a secondary equation. Choose a field that exists on both the target object and the quote. Your summary variable can perform another equation using the results of its aggregate function against either the value element or the variable element.
Filter Field and Filter Value	Use the filter field and filter value to evaluate only records that match the filter. For example, start with the aggregate field of List Price and filter down to list prices from only quote lines whose Product Family equals Hardware. Product Family is the filter field, and Hardware is the filter value.
Operator	The method for evaluating filter values, such as Equals or Greater Than.
Constraint Field	An optional constraint that filters by quote-level field values. Choose a field that exists on both the target object and the quote. Your summary variable includes a record's aggregate field for evaluation only if the constraint field's value matches on both the target object and the quote. For example, your summary variable averages list prices on the asset. You could make a custom Industry field on your quote and asset, then set Industry as your summary variable's constraint field. When Industry equals Hardware on both the asset and its parent quote, your summary variable includes that asset's list price in the fields it averages. The constraint field isn’t a standalone field. This field is evaluated if the filter criteria in the summary variable are met.

Field	Description
Value Element	A number used to perform a mathematical operation against the results of your aggregate function. For example, let's say your aggregate function returns a value of 144. Your composite operator has a value of Divide and your value element has a value of 2. In this case, your summary variable returns a value of 72.
Variable Element	The variable element looks up to another summary variable. You can take the results of your aggregate function and perform another operation on them using the composite operator and the variable element. For example, let's say your aggregate function returns a value of 10. Your composite operator has a value of Multiply and your variable element looks up to a summary variable that returns 20. In this case, your summary variable returns a value of 200.
Scope	This field has been deprecated. Use Target Object instead.

Salesforce CPQ Product Fields

Salesforce CPQ provides custom-managed fields for products. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Asset Amendment Behavior	SBQQ__AssetAmendmentBehavior__c	Picklist	Indicates how assets representing this product behave on amendments.
Asset Conversion	SBQQ__AssetConversion__c	Picklist	Determines how quote lines for this product are converted to assets. Select either One per quote line or One per unit.

Field	API Name	Data Type	Definition
Batch Quantity	SBQQ__BatchQuantity__c	Number (10,2)	Quantity in one batch for products sold in batches. Quantity entered in the quote line is divided by this value and rounded up to the nearest integer.
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Determines how often this product is invoiced.
Billing Type	SBQQ__BillingType__c	Picklist	Defines when billing occurs. Billing in advance lets you bill customers for products or services before you provide them. Billing in arrears lets you bill customers after you provide products or services.
Block Pricing Field	SBQQ__BlockPricingField__c	Picklist	Field used to calculate block pricing.
Charge Type	SBQQ__ChargeType__c	Picklist	Product charge's type.
Component	SBQQ__Component__c	Boolean	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.

Field	API Name	Data Type	Definition
Configuration Event	SBQQ__ConfigurationEvent__c	Picklist	Choose an option to control when the Configure Products page shows up for this product. • Select Add to show the Configure Products page only during initial configuration. • Select Edit to show the Configure Products page 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 used for this product during configuration.
Configuration Form Title	SBQQ__ConfigurationFormTitle__c	Text(100)	Title of the configuration form rendered from the specified configuration fields.

Field	API Name	Data Type	Definition
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 • Required if the bundle must be configured
Configuration Validator	SBQQ__ConfigurationValidator__c	Long Text Area	JavaScript function used to validate the 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 a dynamic product description for configured products.
Cost Editable	SBQQ__CostEditable__c	Boolean	Controls whether cost for this product is 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)	

Field	API Name	Data Type	Definition
Custom Configuration Required	SBQQ__CustomConfigurationRequired__c	Boolean	
Customer Community Availability	SBQQ__CustomerCommunityAvailability__c	Picklist	Select how this product is available in Experience Cloud sites. • Only When Already Owned:Product is only available within Experience Cloud sites when selected through customer self-service. • Always:Product is always available to all members of Experience Cloud sites. • Never: Product is never available within Experience Cloud sites.

Field	API Name	Data Type	Definition
Default Pricing Table (v24.2)	SBQQ__DefaultPricingTable__c	Picklist	Select the pricing table where this product appears by default when price dimensions are defined. • Segmented: MDQ products appear in the Segmented table, where users can edit segments of time. • Standard: MDQ products appear in the Standard table and behave as a single line item. Users can resegment the line item if desired.
Default Quantity	SBQQ__DefaultQuantity__c	Number(13, 5)	Specifies the starting quantity of the product when added.
Disable Reconfiguration	SBQQ__ReconfigurationDisabled__c	Boolean	Select to disable reconfiguration of this product. If this field is selected, users don’t have access to a Configure link on the Edit Lines page after the product is added.
Discount Category	SBQQ__DiscountCategory__c	Lookup(Discount Category)	Discount category assigned to this product.
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup(Discount Schedule)	Discount schedule for use with this product.

Field	API Name	Data Type	Definition
Enable Large Configuration	SBQQ__EnableLargeConfiguration__c	Boolean	Enables large bundle configuration.
Exclude From Percent of Total	SBQQ__ExcludeFromMaintenance__c	Boolean	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	Boolean	Indicates that this product is excluded from transfer to the Opportunity.
Externally Configurable	SBQQ__ExternallyConfigurable__c	Boolean	When selected, indicates that configuring this product automatically launches the External Configuration URL, defined in Salesforce CPQ settings.
Generate Contracted Price	SBQQ__GenerateContractedPrice__c	Picklist	Select Yes to auto-generate a contracted price on an Account when the Opportunity is contracted.
Has Configuration Attributes	SBQQ__HasConfigurationAttributes__c	Boolean	Verifies whether this product has configuration attributes.
Has Consumption Schedule	SBQQ__HasConsumptionSchedule__c	Boolean	Indicates whether this product is assigned to at least one active consumption schedule.

Field	API Name	Data Type	Definition
Hidden	SBQQ__Hidden__c	Boolean	Excludes this product from appearing on the quote document, whether in Microsoft Word or in a PDF.
Hide Price in Search Results	SBQQ__HidePriceInSearchResults__c	Boolean	Indicates whether the product price is displayed in the Product Search Results.
Include in Percent of Total	SBQQ__IncludeInMaintenance__c	Boolean	Select to include products in Percent of Total calculations that are normally excluded (for example, subscription products).
Lock Description	SBQQ__DescriptionLocked__c	Boolean	Flag that indicates this product's description is locked (not editable on the quote).
New Quote Group	SBQQ_NewQuoteGroup__c	Boolean	Create a quote group when this product is added (unless the current group is empty).
Non Discountable	SBQQ__NonDiscountable__c	Boolean	Marks this product as non-discountable.
Non Partner Discountable	SBQQ__NonPartnerDiscountable__c	Boolean	Select to make this product non-discountable for partners.

Field	API Name	Data Type	Definition
Optional	SBQQ__Optional__c	Boolean	Select if this product is optional by default. Optional products don't contribute to the quote total or get transferred to the opportunity, contract, or order.
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 selecting a checkbox next to the option. • Add: Users click an Add button that opens an Option Selection page with all available options.
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.

Field	API Name	Data Type	Definition
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, suppose that 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.

Field	API Name	Data Type	Definition
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)	This field looks up to a product. When a covered asset has a Percent of Total Target value, the parent Percent of Total subscription product uses the target's list price, not the covered asset's price. The percent of total subscription price calculation still includes other valid products on the quote. Salesforce CPQ supports percent of total target pricing only when the Percent of Total subscription product has a Percent of Total Base value of List.
Price Editable	SBQQ__PriceEditable__c	Boolean	Indicates that this product allows for price to be freely editable when building a quote.

Field	API Name	Data Type	Definition
Pricing Guidance	SBQQ__PricingGuidance__c	Lookup(Pricing Guidance)	Pricing guidance for use with this product.
Pricing Method	SBQQ__PricingMethod__c	Picklist	Apply a pricing method to this product. • List: Standard price book pricing. • Cost: Use for cost-plus-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	Boolean	Specifies whether Pricing Method is changed when this product is added to a 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	Boolean	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.

Field	API Name	Data Type	Definition
Renewal Product	SBQQ__RenewalProduct__c	Lookup(Product)	Product that replaces this product on renewal. Use it to quote a different SKU when renewing. • List: The list price of the new product is used. • Same: The list price of the original subscription is used, and a discount is applied to preserve the customer price. • Functions similarly as Same, but an uplift percentage can also be applied to the customer price. The Renewal Product field can't target a product with a consumption schedule. You can’t replace a renewable subscription product with a one-time product.

Field	API Name	Data Type	Definition
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're 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: None, Fixed Price, or Percent of Total. None means this product isn't a subscription.
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: Renewal, One-time, Renewable/ Evergreen, or Evergreen. Renewable subscriptions transfer to renewal quotes. One-time subscriptions don't. This field determines whether the product is renewable and can be evergreen during the quoting process.

Field	API Name	Data Type	Definition
Taxable	SBQQ__Taxable__c	Boolean	Indicates whether products in record related to this account are taxable. By default, enabling this field doesn't perform any actions in Salesforce CPQ. For example, selecting this field doesn’t prevent the product from being added to quotes and orders for non-taxable accounts. However, Avalara for Salesforce CPQ evaluates the Taxable field when performing tax calculations.
Tax Code	SBQQ__TaxCode__c	Boolean	Indicates whether this product is taxable.
Term Discount Level	SBQQ__TermDiscountLevel__c	Picklist	Specify subscription term level used in calculating term discount. Leave blank to indicate default.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	Specify subscription term level 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.

Field	API Name	Data Type	Definition
Upgrade Ratio	SBQQ__UpgradeRatio__c	Number(8, 3)	Conversion rate between this upgrade product and its source 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 Salesforce CPQ Quotes

Create a quote for your customers. After you add products to your quote, you can adjust their quantities, configuration, and pricing. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Important:

The Salesforce CPQ managed package continues to be available for existing customers, however, there is no longer any new feature development. We will continue to provide support and services for the duration of your contract. You can also add more user licenses to your Salesforce org during your current subscription term and renew existing subscriptions.

For a more comprehensive and robust CPQ solution, we recommend exploring Revenue Cloud.

- Managing Bill To and Ship To Addresses on Salesforce CPQ Quotes

Salesforce CPQ configures the quote's Bill To Address based on the values of the quote's Partner field, Distributor field, and Account field, which are all Account lookup fields. If the quote doesn't have a partner or distributor account, its Bill To address defaults to the account address. Otherwise, you can configure your quote to inherit the partner and distributor accounts from your opportunity or define them manually during quote creation. The Ship To address always inherits the address of the account referenced in the quote's Account field. (Salesforce CPQ Managed Package)

- Using the Quote Line Editor

Add or remove products, apply discounts and markups, and calculate prices for your quote. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Product Rules in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Discounts in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Price Rules in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Refreshing Quote Prices

The Refresh Prices button lets sales reps pull the latest price book values into their quote, or into all of the quotes on their opportunity. (Salesforce CPQ Managed Package)

- The Salesforce CPQ Quote Calculation Sequence

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. (Salesforce CPQ Managed Package)

- Enhance Quotes with Custom Scripts

Use JavaScript code to add extra functionality to the CPQ quote line editor. Custom scripts are called by the Quote Calculator Plugin. (Salesforce CPQ Managed Package)

- Lookup Queries

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. (Salesforce CPQ Managed Package)

- Salesforce CPQ Quote Fields

Salesforce CPQ provides various custom-managed fields for CPQ quotes. (Salesforce CPQ Managed Package)

- Salesforce CPQ Quote Line Fields

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

- Salesforce CPQ Subscription Fields

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 their field values from their subscription product quote line items or order products. (Salesforce CPQ Managed Package)

- Salesforce CPQ Quote Line Group Fields

Salesforce CPQ provides various custom managed fields for CPQ quote line groups. Quote lines groups store information about how lines on a quote are organized into groups. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Managing Bill To and Ship To Addresses on Salesforce CPQ Quotes

Salesforce CPQ configures the quote's Bill To Address based on the values of the quote's Partner field, Distributor field, and Account field, which are all Account lookup fields. If the quote doesn't have a partner or distributor account, its Bill To address defaults to the account address. Otherwise, you can configure your quote to inherit the partner and distributor accounts from your opportunity or define them manually during quote creation. The Ship To address always inherits the address of the account referenced in the quote's Account field. (Salesforce CPQ Managed Package)

Configuring Bill To Addresses Based on the Opportunity

Opportunities contain a Partners related list. When you click **New**, it shows five Account lookup fields. You can mark one as the Primary Partner and define a role for each of your accounts. When you create a quote from the opportunity, Salesforce CPQ configures the quote's Partner field and Distributor field based on how you configured the opportunity's partners.

- If you mark an account as Primary and don't have an account with a Distributor role, or don't select any other accounts, your quote's Partner field looks up to the Primary account. The quote's Distributor field is null. The quote's Bill To Address inherits the address from the account referenced in the Partner field.
- If you mark an account as Primary and have an account with a Distributor role, your quote's Partner field looks up to the Primary account. The quote's Distributor field looks up to the Distributor account. The quote's Bill To Address inherits the address from the account referenced in the Distributor field.

To help follow this data flow, let's say you have an Account A and Account B. Here are all the ways you can configure them.

Account A	**Account B**	**Quote.Partner**	**Quote.Distributor**	**Quote's Bill To Address**
Primary	Null or non-Distributor role	Account A	Null	Inherited from the address of the account referenced in the Partner field
Primary	Role = Distributor	Account A	Account B	Inherited from the address of the account referenced in the Distributor field
Null or not Primary	Role = Distributor	Null	Account B	Inherited from the address of the account referenced in the Distributor field
Null or not primary	Null, or non-Distributor role	Null	Null	Inherited from the address of the account referenced in the Account field

Configuring Bill To Addresses during Quote Creation

If you didn't configure Partner accounts on your opportunity, you can configure Bill To addresses by entering values for the Partner and Distributor fields on the New Quote page.

- If you provide only a Partner account, the quote's Bill To address inherits the address from the partner account.
- If you provide a Partner and Distributor account, the quote's Bill To address inherits the address from the distributor account.

Important: If you configured Partner accounts on your opportunity, the Partner and Distributor fields are null on the New Quote page. However, Salesforce CPQ configures the Bill To Address after you click **Save** on the New quote page and overrides any partner and distributor values you enter based on the opportunity's Partner account configuration.

Addresses on Orders and Renewal Quotes

When you order a quote the order's Billing Address inherits the values of the quote's Bill To Address.

When you renew a contract, the renewal quote's Bill To address inherits the partner and distributor accounts of the contract's quote and configures the Bill To address based on the processes shown earlier in the table.

Using the Quote Line Editor

Add or remove products, apply discounts and markups, and calculate prices for your quote. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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 (of type Validation and Alert). 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Custom Actions

Custom actions are buttons that sales reps can click to perform an action in the quote line editor, configurator, or several other detail pages. For example, sales reps can select to show a filtered section of your price book or to direct users to an internal or external URL. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Guidelines for Cloning Quote Lines

Clone a product in the line editor and reconfigure the product before finalizing your quote. (Salesforce CPQ Managed Package)

- Quote Line Editor Drawers

Organize excess line editor fields in collapsible drawers shown under each quote line. (Salesforce CPQ Managed Package)

- Guided Selling in Salesforce CPQ

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." (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Add Fields to the Quote Line Editor Field Set

Add fields to the quote's line editor field set so that the fields appear at the top of the quote line editor. Your sales reps can edit those fields and save or calculate the quote to apply the fields across quote lines. (Salesforce CPQ Managed Package)

- Optimize Column Widths in Quote Line Editor

To give sales reps the ability to customize the layout of the quote line editor, add the ability to resize column widths. (Salesforce CPQ Managed Package)

- Large Quote Experience

Configure the quote line editor so your sales reps can quickly navigate through quotes with many list items. (Salesforce CPQ Managed Package)

- Large Quote Performance Settings

Improve the calculation performance for large quotes by using the Large Quote Threshold and Quote Batch Size package settings. (Salesforce CPQ Managed Package)

- Salesforce CPQ Quote Line Fields

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

Related information

Knowledge Article: Allow the User to Change the Field Set While in the Edit Lines Page

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

- Quote Line Groups in Salesforce CPQ

Apply discounts or obtain totals for specific sets of quote lines by organizing them into groups within the Line Editor. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Quote Line Groups in Salesforce CPQ

Apply discounts or obtain totals for specific sets of quote lines by organizing them into groups within the Line Editor. (Salesforce CPQ Managed Package)

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. We recommend you limit the quote line groups created for a single quote to 40.

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

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

You can save time by having these groups available right away rather than manually re-creating 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. Name the groups Hardware and Software and make them available to all users when they add line items to their quotes.

When users select **Groups** in the quote line editor, they see a list of up to 200 available solution groups. Selecting a solution group creates a group with the solution group's name and description. The new group doesn't have any quote line items. Users can add products to the group from the product selection page.

To enable solution groups, select **Solution Groups Enabled** in your Groups package settings. Enter `SBQQ__SolutionGroup__c` as the object, and select **Group Name** and **Description** for the Name and Description fields respectively. You can then create as many solution group records as you need.

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

- 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

Custom actions are buttons that sales reps can click to perform an action in the quote line editor, configurator, or several other detail pages. For example, sales reps can select to show a filtered section of your price book or to direct users to an internal or external URL. (Salesforce CPQ Managed Package)

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

Custom actions have different actions available based on where the custom action appears in Salesforce CPQ. For example, custom actions in the quote line editor can delete lines, add a quote line group, or save the quote and navigate to an internal or external page. Custom actions in the configurator can load an internal or external page and apply edit rules. Custom actions on the contract can amend or renew the contract.

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.

You can also add search filters to your custom action. When a sales rep clicks the custom action in the quote line editor or configurator, it filters products based on the search filter parameters.

Salesforce CPQ ships with several custom actions you can enable in the quote line editor.

- Add Products
- Add Favorites
- Add Recommendations
- 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.
- The Add Recommendations custom action is used with the Recommended Products plug-in to link to the **Add Recommendations** page from the quote line editor. If you activated the Add Recommendations custom action, but the plug-in isn't implemented, you can hide the custom action. Remove all quote lines, and click **Quick Save**.
- The Add Recommendations custom action doesn't support the Large Quote Threshold setting.
- The Apply Rules custom action is available in Salesforce CPQ Spring '20 and later.
- Quick Save custom actions on the quote-line level aren't supported.

- 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. (Salesforce CPQ Managed Package)

- Create a Filtering Custom Action

Create a custom action that filters products, subscriptions, or assets in the quote line editor or configurator. (Salesforce CPQ Managed Package)

- Custom Actions for Links to Fields or URLs

Custom actions can link to an internal or external URL. They can also link to a Salesforce custom field parameter and pass that parameter to an internal or external source. (Salesforce CPQ Managed Package)

- Custom Action Conditions

A custom action condition uses a logical operator to compare the value of a quote or product field against a user-defined value. You can set up conditions so that a custom action in the quote line editor or configurator appears only when some or all of its conditions are met. (Salesforce CPQ Managed Package)

- Parameters for Custom Actions

Your custom action can target several fields across objects that interact with the quote line editor. (Salesforce CPQ Managed Package)

- Guidelines for Custom Actions

When you're working with custom actions, consider key guidelines. (Salesforce CPQ Managed Package)

Custom Action Fields

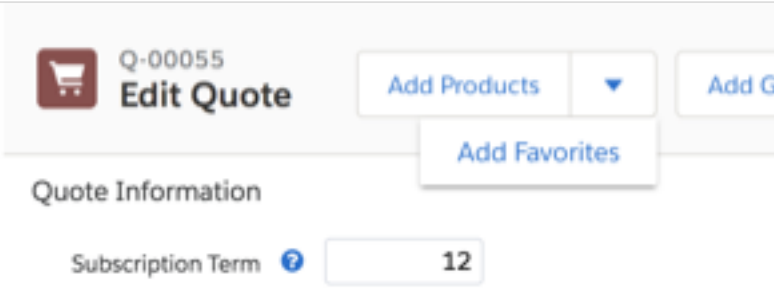
Review these custom action fields, listed in alphabetical order. With certain page layouts and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Custom Action Fields

Action	The result of selecting the custom action.
Action Name	The name is used in your list of custom action records. It doesn't appear on the button.
Active	Select this field to show the custom action on your target page.
Brand Button	Enable brand button styling on this custom action when it appears in the UI. Brand button styling is based on brand button settings in your org's active Theme.
Conditions Met	If your custom action uses conditions, choose whether the custom action must meet any or all its conditions.
Default	When enabled, for custom actions with a search filter, show the Product Selection page with a filtered product list first when users open the quote line editor. This field doesn't work for other types of custom actions.
Description	Describes what the custom action does.
Display Order	The order in which custom actions appear on a page is based on the display order. Custom actions with lowest display order appear first, from left to right.

Event Handler Name	This field is for Salesforce internal use only. No need to add it to your page layout.
Icon	If your custom action is a button, you can make it appear as an icon image.
Label	The text that appears on your custom action in the UI. We've provided a collection of default labels, but you can also add your own as a new picklist value.
Location	The custom action appears in this area on your chosen page. This field's values vary based on the value of the Page field.
Page	Choose where the custom action appears. This field controls the available values in the Location and Action fields.
Page Handler Name	This field is for Salesforce internal use only. No need to add it to your page layout.
Parent Custom Action	A parent custom action groups one or more custom actions under a dropdown arrow. There's no limit to the number of custom actions that look up to the same parent, but we recommend that your child custom actions don't flow over your quote lines. For example, the Add Favorites custom action has the Add Products custom action as its parent.



Return Target	Users return to this page instead of the quote detail page when they leave the quote line editor. This field works only for quote line editor custom actions that perform a Save or Cancel action.
Return URL	Enter a URL if you want Salesforce CPQ to return customers to the URL after the custom action's action has finished.
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, subscriptions, or favorites. We deprecated this field after Salesforce CPQ V25. Users on later versions should use the Page, Location, and Action fields to control the results of their custom action.

Type	Choose whether the custom action appears as a button, menu, or separator in the UI.
URL	When a user clicks the custom action, it takes them to the URL provided in this field. The URL can be a link to an internal or external page, or a Salesforce CPQ field. URLs must start with `http://` or `https://`. For more information on setting up field parameters, check out Considerations for Linking to Custom Fields from Custom Actions.
URL Target	If your custom action links to 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. (Salesforce CPQ Managed Package)

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

1. Set your custom action's Page field to Quote Line Editor or Configurator.
2. Select a Location.

   When a user selects your custom action, Salesforce CPQ opens a product selection page for the chosen page.
3. Set the Type and Icon fields to customize how your custom action appears.
4. 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."
5. Select **Default** to activate this custom action when a user opens the quote. This process takes the user directly to the selection screen you defined in Step 1 rather than the quote line editor. This field works only for custom actions with a search filter.
6. 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.
7. 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.
8. Enter a description that appears when users hover over the custom action button.

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

Custom Actions for Links to Fields or URLs
Custom actions can link to an internal or external URL. They can also link to a Salesforce custom field parameter and pass that parameter to an internal or external source. (Salesforce CPQ Managed Package)

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

- Considerations for Linking to Custom Fields from Custom Actions
Custom actions can use field parameters to link to a specific field on a record. Add your field parameters in the custom action URL field. (Salesforce CPQ Managed Package)
- Add a Linking Custom Action to the Quote Line Editor
Create a custom action in the quote line editor that links to an internal or external URL. (Salesforce CPQ Managed Package)
- Add a Linking Custom Action to the Configurator
Create a custom action in the configurator that links to an internal or external URL. (Salesforce CPQ Managed Package)

Considerations for Linking to Custom Fields from Custom Actions
Custom actions can use field parameters to link to a specific field on a record. Add your field parameters in the custom action URL field. (Salesforce CPQ Managed Package)

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

When you link to a field through a custom action, consider these key guidelines.

- Custom actions can link to quote, quote line, or quote line group fields.
- When a sales rep clicks the custom action, the action occurs only if the URL field is visible in the quote line editor. Exceptions are quote, quote line, and quote line group ID fields, which are always available. For example, if a URL targets {!SBQQ__Quote__r.SBQQ__MyCustomField__c}, you must also have My Custom Action in your quote’s Line Editor field set. Otherwise, Salesforce CPQ considers My Custom Action undefined, and your custom action doesn’t occur.
- If a field inherits a value from a related object, you can reference that field as it appears on the related object. For example:
  - To reference the ID of the quote line group associated with a quote line, use {!SBQQ__Group__r.Id} or {!SBQQ__Group__c.Id}.
  - To reference the ID of the quote associated with a quote line group, use {!SBQQ__Quote__r.Id} or {!SBQQ__Quote__c.Id}.

Add a Linking Custom Action to the Quote Line Editor
Create a custom action in the quote line editor that links to an internal or external URL. (Salesforce CPQ Managed Package)

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. Use the name to organize your custom actions records.
3. Set these fields.

   The Save and Navigate action is supported only when the Page field is set to *Quote Line Editor* and the Location field is set to *Quote*.

   a) Set the Page field to Quote Line Editor.

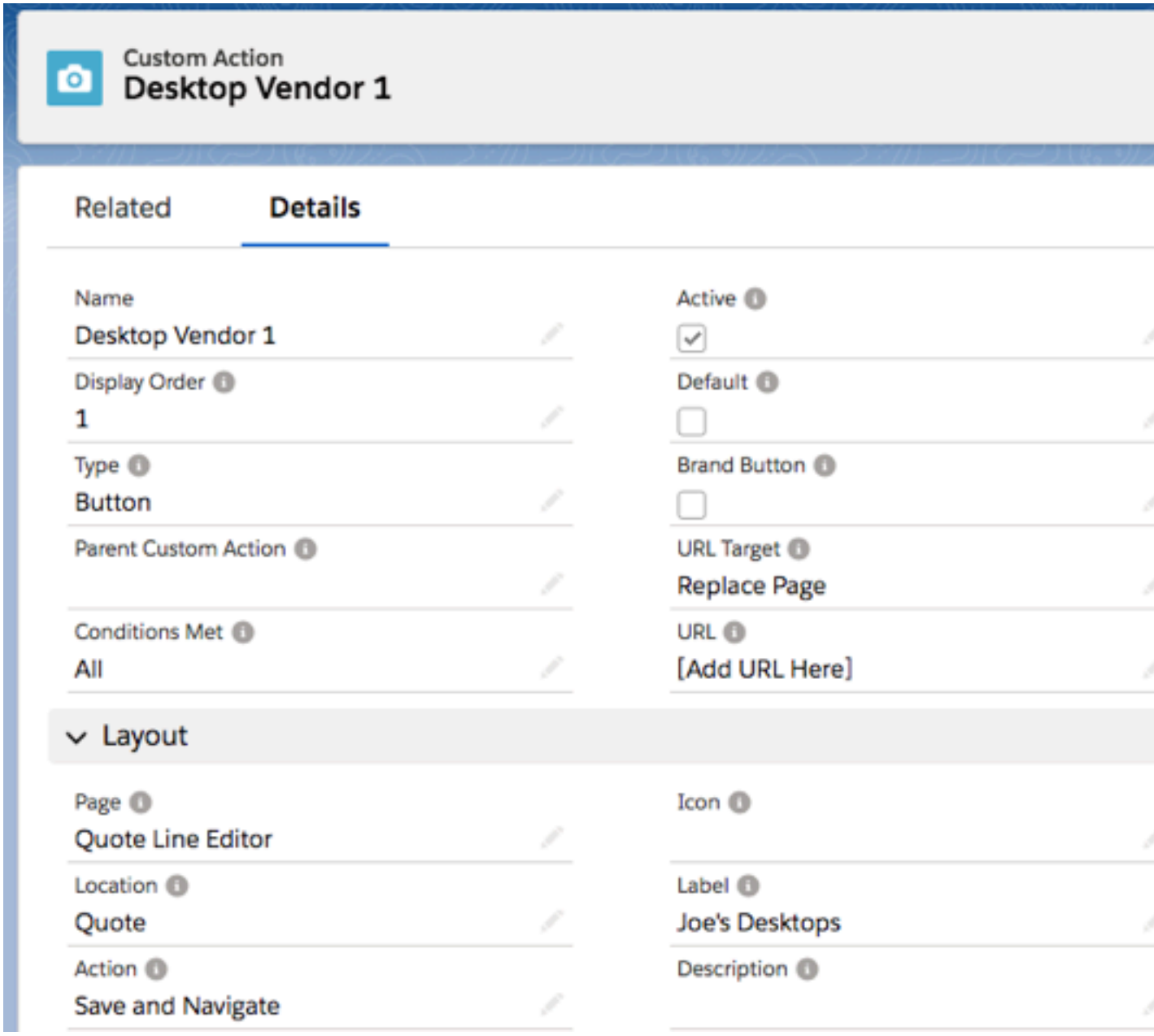
   b) Set the Location field to Quote.

   c) Set the Action field to Save and Navigate.
4. Give your custom action a label.

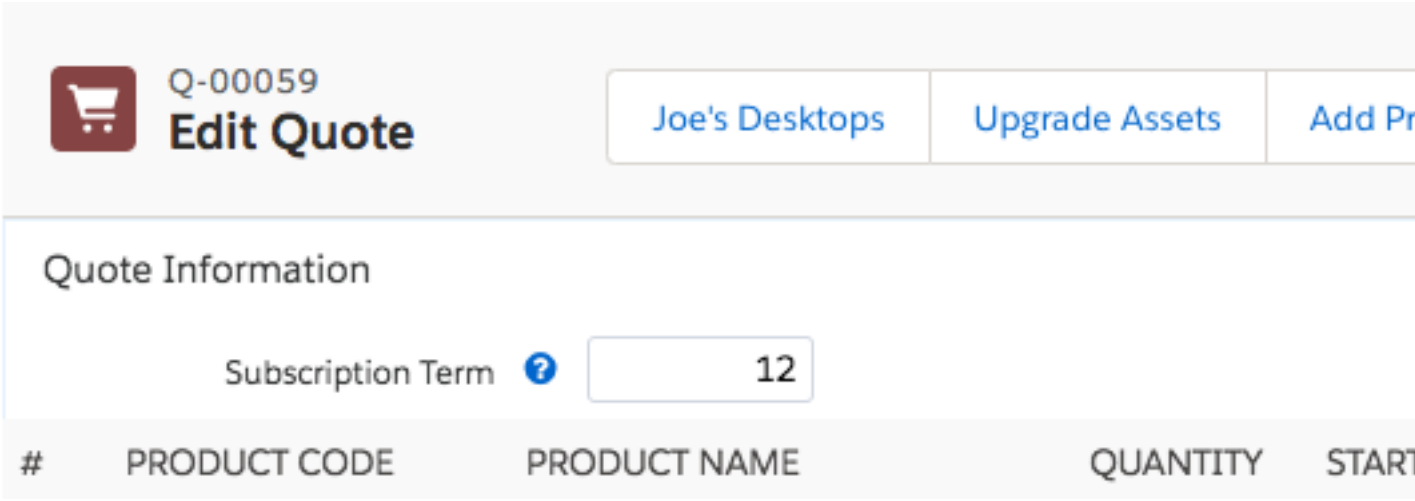
   This label appears on the button for your action. You can pick from several default labels. You can also add labels by adding values to the Label field in the Custom Action object's managed settings.
5. If you want the custom action to be available only when certain conditions are met, use the Condition Met field to define the conditions.
6. Choose a number for your custom action's display order. Custom actions with lower display orders appear first on their target page.
7. Select the **Active** checkbox.
8. Use the URL field to specify what the custom action links to.

   When a Custom Action has URL Target = Popup, only Visualforce Pages are supported in the URL field.
9. Set the URL Target field to Replace Page so that your target URL opens on your current page.

Your company sells custom desktops. You want to provide your sales rep with links from the quote line editor to your largest vendor's inventory pages. Here's one way to create the first custom action.



Because you set the display order to `1`, your custom action appears first in the quote line editor.



Add a Linking Custom Action to the Configurator
Create a custom action in the configurator that links to an internal or external URL. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’14 and later

1. On the Custom Actions home page, click **New**
2. Give your custom action a name.

   Note: This name doesn’t appear on the button for your action. It’s used only to help you organize your custom actions records.
3. Set these fields.
   - Page: Product Configurator
   - Location: Configurator
   - Action: Launch External
4. Give your custom action a label.

   Note: This label appears on the button for your action. You can select from several default labels. You can also add labels by adding values to the label field in the Custom Action object’s managed settings.
5. If you want the custom action available only when certain conditions are met, use the Condition Met field to define the conditions.
6. Choose a number for your custom action’s display order. Custom actions with lower display orders appear first in their target page.
7. Select the Active checkbox.
8. Use the URL field to specify what the custom action links to.
9. Set the URL Target field to **Popup** or **Replace Page**.

Custom Action Conditions
A custom action condition uses a logical operator to compare the value of a quote or product field against a user-defined value. You can set up conditions so that a custom action in the quote line editor or configurator appears only when some or all of its conditions are met. (Salesforce CPQ Managed Package)

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

- Considerations for Custom Action Conditions

When you add conditions to your custom actions, consider these key guidelines. (Salesforce CPQ Managed Package)

- 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 the conditions for your custom action so that the action's button is shown only when at least one condition is true. (Salesforce CPQ Managed Package)

Considerations for Custom Action Conditions

When you add conditions to your custom actions, consider these key guidelines. (Salesforce CPQ Managed Package)

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

The Target Object field defines which fields are available to use in the conditions. Depending on where the custom action appears, you can choose either Product or Quote.

Target Object	**Use**
Quote	• Conditions can evaluate quote fields for custom actions that appear in the quote line editor or configurator. A quote-scoped condition evaluates fields only on the quote record. It doesn't evaluate the quote's lines, regardless of whether the custom action appears on the quote, quote lines, or a quote line group. • When Salesforce CPQ evaluates quote fields for a quote line custom action, the action is either shown or not shown on all the quote lines. Custom actions can't be conditionally shown or hidden on specific lines.
Product	• Conditions can evaluate product fields only if your custom action appears in the configurator. • A product-scoped condition evaluates fields only on the product record. It doesn't evaluate the product option record for that product. The custom action must target a product field that's within the bundle being configured.

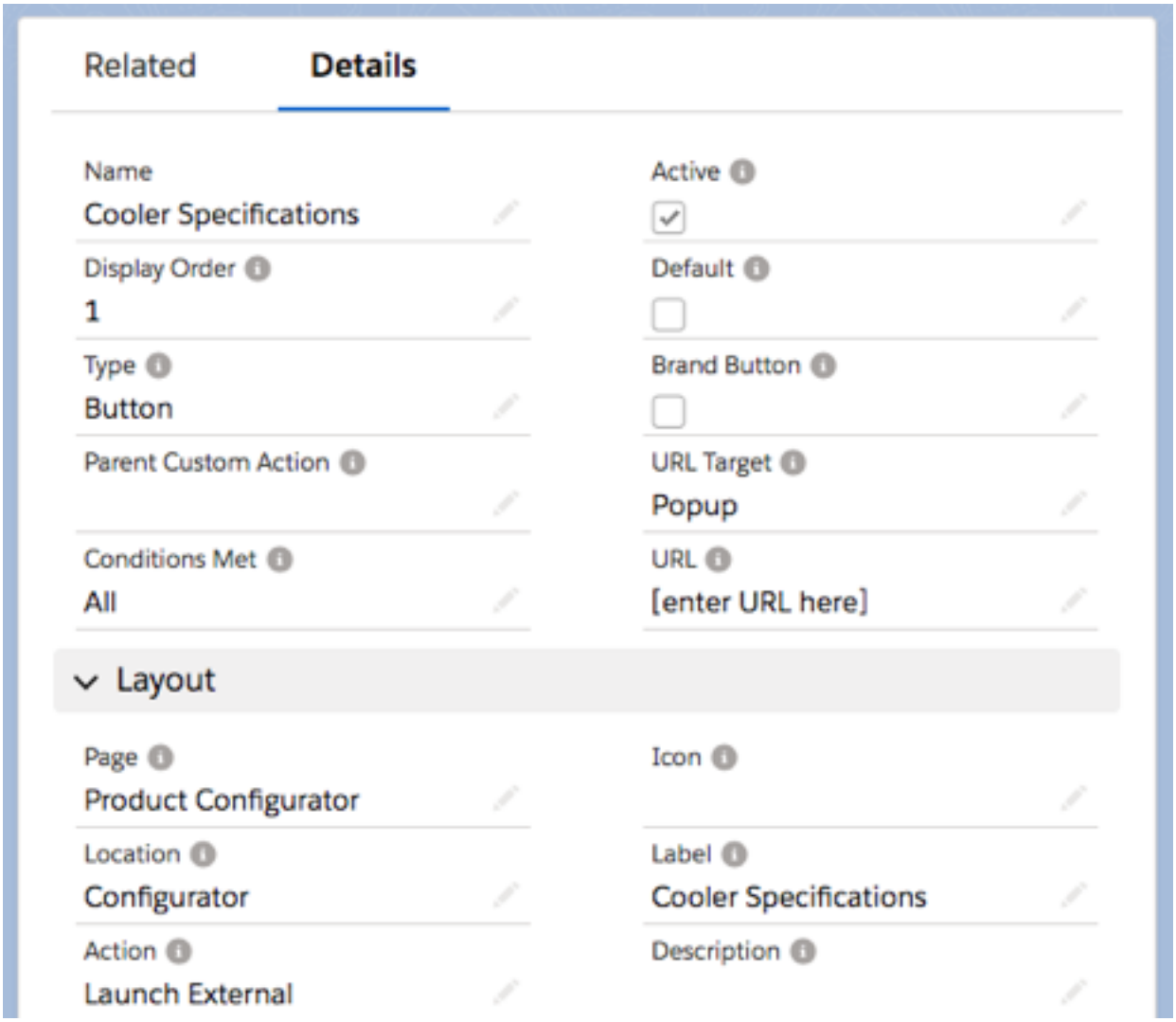
After choosing the target object, use the field, operator, and filter value to define the logical statement that the condition evaluates. For example, your condition could evaluate whether the quote's total price is greater than $500,000, or whether a product contains "LAPTOP" in its product code.

After you create conditions, use the parent custom action's Conditions Met field to specify whether the action must meet any or all of its conditions.

Important: Use conditions only with custom actions that appear in the quote line editor or configurator. They don't work for custom actions that appear on other pages.

Your company sells desktop workstations. Customers can also purchase a liquid CPU cooler, which is provided by a partner. When configuring a bundle that includes a CPU cooler, you want the sales reps to see a custom action that opens a page about the CPU cooler's technical details.

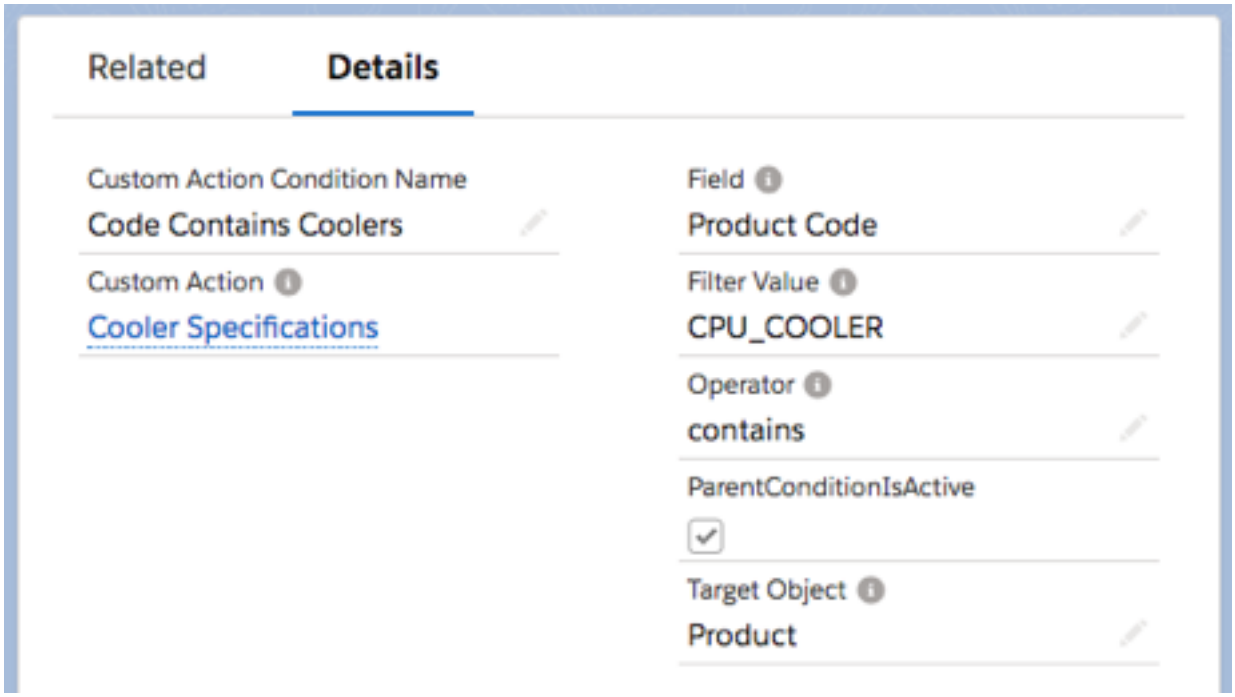
- Create a custom action that appears in the configurator and opens a page in a new window. Because we're only introducing one condition, we can leave the Conditions Met field to All.
  - Set the Type to Button.
  - Set the URL Target to Popup.
  - Set the Page to Product Configurator.
  - Set the Location to Configurator.
  - Set the Action to Launch External.
  - Add a label that describes your custom action, such as Cooler Specifications.
  - Add your URL.



- Create your condition. Because all your company's coolers contain "CPQ_COOLER" in their product codes, your condition must filter by that value.
  - Set the Field to Product Code.
  - Set the Filter Value to CPU_COOLER.
  - Set the Operator to Contains.
  - Set the Target Object to Product.

First, create a custom action that opens a page in a new window. Replace `[enter URL here]` here with your desired URL. Because we only have one condition, we can leave the Conditions Met field to All.

Next, create your condition. Because all your company's coolers contain "CPQ_COOLER" in their product codes, your condition must filter by that value.



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 the conditions for your custom action so that the action's button is shown only when at least one condition is true. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '14 and later

A custom action condition uses a logical operator to compare the value of a Salesforce admin-defined field against an admin-defined value. When that comparison is true, the custom action appears in the quote line editor or configurator.

1. From your custom action record, in the Custom Action Conditions related list, click **New Custom Action Condition**.
2. Choose the same target object as your custom action.

   Note: Custom actions target the quote when their target object is blank. If your custom action's target object is blank, set your custom action condition's target object to Quote.
3. Select the target field that you want to evaluate.

   If your target object is Product, your target field can only be a product option field. If your target object is Quote, your target field can only be a quote field.
4. Select the operator to be used in the comparison.
5. Provide a text string for your filter value.

   This string represents the value that you compare against the value of your target field.
6. Save your custom action condition.

7. From your custom action record, select the Conditions Met value.

   This field specifies whether your custom action must meet at least one condition to show the action's 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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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.
- In the Salesforce CPQ mobile app, custom action dropdown lists in the quote line editor aren't scrollable. To ensure easy navigation in the quote line editor, we recommend no more than five custom actions per quote line, and no more than fifteen quote or quote line group custom actions.
- The Salesforce CPQ mobile app supports five actions per quote line and sixteen custom actions between the quote and any of its quote line groups.
- Starting in Summer '20, if the URL Target on a custom action is set to Replace Page and the URL field is an external link, the return URL opens in a separate tab in Lightning Experience.

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Create Search Filters for Date Ranges

Use the search filter's Between operator to filter objects that fall within a range of two dates. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Search Filters

Use the quote line editor's search filter to filter products, assets, or subscriptions by their field values. (Salesforce CPQ Managed Package)

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.

Important:

- If you add a checkbox field to your search filter, Salesforce CPQ filters products based on the checkbox's value returning False. For example, let's say you had several products with an LCD Screen custom checkbox field. If you add LCD Screen to your search filter, Salesforce CPQ returns products where LCD Screen is unselected. If you want to add an option-based field that doesn't return a True or False filter value by default, add a picklist that defaults to None.
- The search filter's Filter Source Object field supports only a value of Quote. Adding new picklist values isn't supported.

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 that 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.

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '17 and later

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.

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.

CPQ product search doesn't search favorites or values stored in picklist fields.

Note:

- If a global product search in Salesforce CPQ returns over 2,000 records, you can't always see all matching records due to search crowding. See How Search Crowding Affects Search Results.
- When the package setting **Sort Products in Memory** is set to `true`, and the search returns more than 1,000 products, the sort order can be incorrect. Products are returned in batches of 1,000, which are sorted, but the "first" product in the "complete" set of results can be in the second or third batch of 1,000 products. Each batch is sorted in memory, independent of the other batches returned by the

same search. As a workaround, use product families or additional filters on searches. See Additional Salesforce CPQ Package Settings.

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '17 and later

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.

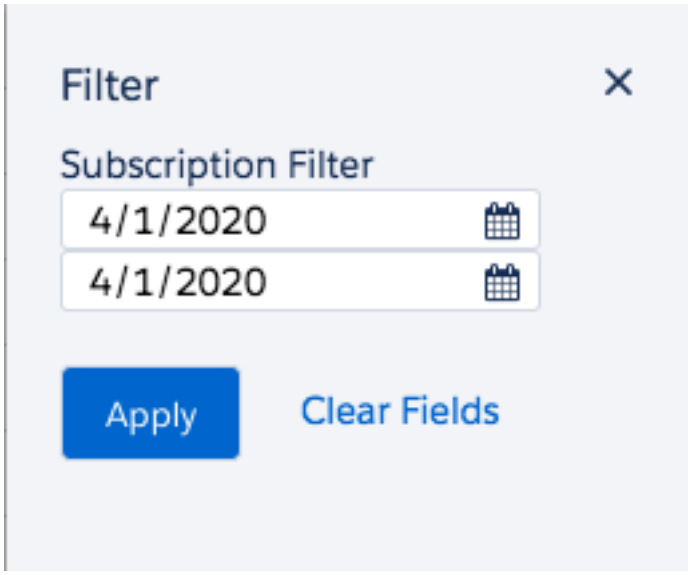
Create Search Filters for Date Ranges
Use the search filter's Between operator to filter objects that fall within a range of two dates. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

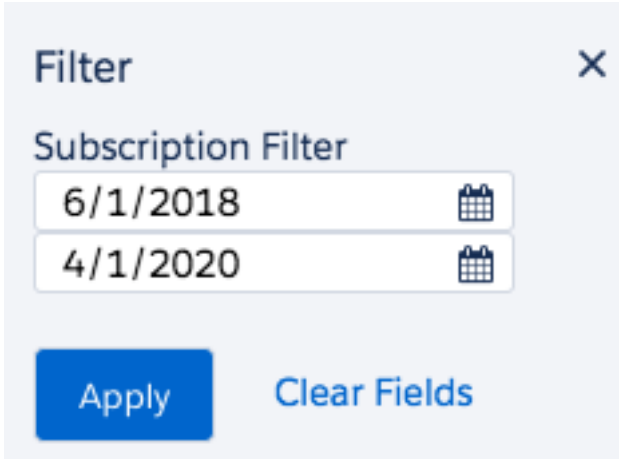
Salesforce CPQ search filters with a date type target field can use operators only with a Between value. When a sales rep opens a Date-type search filter, its upper and lower bounds contain the date from the search filter's filter value. They can adjust either of the bounds to filter objects between (and including) both dates.

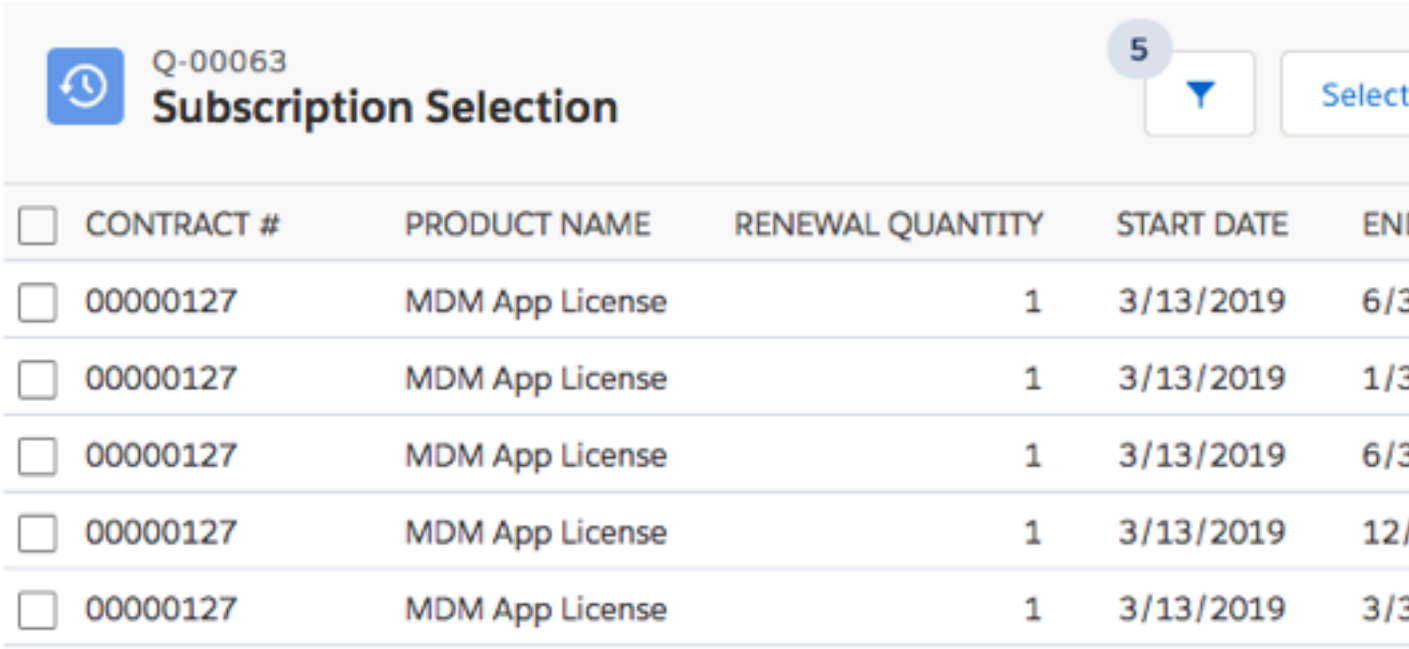
1. Create a search filter and set its target field to your date field.
2. Set the filter value to the last date in your date range.
   Filter value dates must have the format of YYYY-MM-DD.
3. Make sure that the Hidden checkbox field is deselected.

When a sales rep opens a page containing your filter and clicks the filter icon, they see the filter value applied to the filter's lower and upper bounds.



They can change either of the filter's dates to establish a range of target objects between and including these dates.




Q-00063
Subscription Selection
5
Select

CONTRACT #	PRODUCT NAME	RENEWAL QUANTITY	START DATE	EN
00000127	MDM App License	1	3/13/2019	6/3
00000127	MDM App License	1	3/13/2019	1/3
00000127	MDM App License	1	3/13/2019	6/3
00000127	MDM App License	1	3/13/2019	12/
00000127	MDM App License	1	3/13/2019	3/3

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

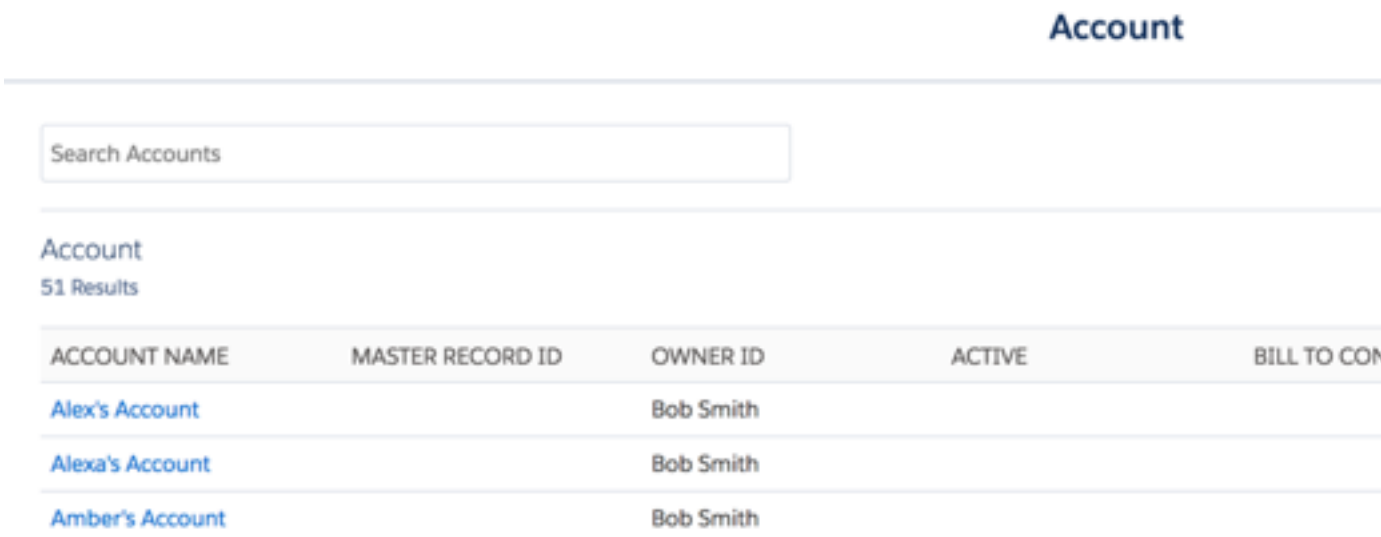
As of Salesforce CPQ Summer '18, all lookup fields used in CPQ Visualforce pages require a Lookup fieldset on the object they target. This fieldset contains the fields that appear in the lookup field's search results window.

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
Clone a product in the line editor and reconfigure the product before finalizing your quote. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Select a quote line's clone icon to create a copy of the line below the original line. The cloned line retains all the field values and configurations of the original line, except for the custom fields that aren't loaded into the quote line editor. To make sure the fields that aren't typically used in calculations are copied over to the clone, add those fields to the ReferencedFields field set. After cloning, you can change those configurations as needed.

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 window where you can choose any number of groups to clone your selected lines into.

Bundles and MDQ products retain their structures when cloned between groups.

Quote Line Editor Drawers

Organize excess line editor fields in collapsible drawers shown under each quote line. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ **Spring ’17** and later

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 in Salesforce CPQ

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.” (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’15 and later

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.

Note: If your reps use Lightning Experience, include no more than five process inputs in a quote process. Additional process inputs are cut off in the dialog box.

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. When users access the Product Selection page for a quote containing this quote process, the filter panel button is disabled.
Product Configuration Initializer	Looks up 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. (Salesforce CPQ Managed Package)

- Guided Selling: Basic Example

Create a basic guided-selling prompt to help sales reps select a product from multiple options. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Create a Quote Process for Guided Selling

Create a quote process to store setup information for your guided selling prompt. (Salesforce CPQ Managed Package)

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 results don't display correctly when the Salesforce CPQ package setting Product Results Group Field Name targets a a custom field.

Related concepts

Guided Selling: Basic Example

Create a basic guided-selling prompt to help sales reps select a product from multiple options. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Guided Selling: Basic Example
Create a basic guided-selling prompt to help sales reps select a product from multiple options. (Salesforce CPQ Managed Package)

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
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.

Related concepts

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. (Salesforce CPQ Managed Package)

Related tasks

Create a Quote Process for Guided Selling
Create a quote process to store setup information for your guided selling prompt. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’16 and later

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	Business_Solution__c	equals
Server Types	What server types?	2	Server_Replacements	Server_Replacements__c	equals
Deployment Options	Deployment Options	3	Deployment_Options	Deployment_options__c	equals
Commercial Segment	Commercial Segment	4	Commercial_Segment	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.

Related concepts

Guided Selling: Basic Example

Create a basic guided-selling prompt to help sales reps select a product from multiple options. (Salesforce CPQ Managed Package)

Related tasks

Create a Quote Process for Guided Selling

Create a quote process to store setup information for your guided selling prompt. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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 the quote's line editor field set so that the fields appear at the top of the quote line editor. Your sales reps can edit those fields and save or calculate the quote to apply the fields across quote lines. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

User Permissions Needed	
To update the Quote Line Editor field set:	Customize Application

1. From Setup, in the Quick Find box, enter `Objects`, and then select **Objects**.
2. Select **Quote Line**.
3. From the Field Sets related list, select **Line Editor**, and then click **Edit**.
4. Add or remove fields from the field set.

   If the field is a lookup field with a lookup filter, you must add the fields referenced by the lookup filter to the quote line editor. Use one of these methods:

   - Add the fields referenced by the lookup filter to the Line Editor field set.
   - Create a custom field set called ReferencedFields, and add the fields referenced by the lookup filter to the ReferencedFields field set.

   Include any fields referenced by the lookup filter in the field set. If you're using the Enable Product Hierarchy setting or the Enable Expand Collapse setting, you must include Product Name in the field set.

   Fields in Quote / Quote Line Group / Quote Line Field Sets with the Required attribute do not require values in the line editor. A Validation Rule that tests if Fields are null will return an error on a Save operation.
5. Change the field set on the Edit Lines page:
   a) From Setup, in the Quick Find box, enter `Objects`, and then select **Object Manager**.
   b) Select **Quote Line**.
   c) Select the quote line object.
   d) Select **Field Sets**.
   e) Select **New**, enter the field set details, and drag fields to the field set list as needed.

6. Create a picklist on the Quote object.
   a) In Object Manager, select the Quote Object.
   b) Select **Fields & Relationships**, click **New**, and select **Picklist** to create a picklist field.
   c) Click **Next**, and enter a label for the field.
   d) Select **Enter values, with each value separated by a new line**.
   e) Enter the picklist values.
      These values must be the API names of the field sets that you created on the Quote Line Object (Remember: Field Set API Names don't contain "__c").
   f) Enter `EditLinesFieldSetName` as the field name, and then click **Next**.
   g) Select the field-level security checkboxes as needed. Click **Next**.
   h) Add the new field to page layouts and save your changes.
   i) Return to the Quote object.
   j) Edit the Line Editor field set and include the new field.
   k) In the Line Editor of a quote containing quote lines, select a value from the picklist.
   l) To see the changed Quote Line column headers, you must click **Quick Save**.
      Quick Save must be clicked in order for you to see the changed Quote Line column headers. Moreover, if you set the picklist value back to `None` and click **Quick Save** takes you back to the Line Editor Field Set.
7. Control the field set by using a formula field:
   a) From Setup, in the Quick Find box, enter `Objects`, and then select **Object Manager**.
   b) Select **Quote**.
   c) On the Quote object, create a formula field.
   d) Enter a label for the field.
   e) Enter `EditLinesFieldSetName` (API Name: EditLinesFieldSetName__c) as the field name.
   f) In Formula Return Type, enter `Text`.
   g) In the formula body, enter the API names (Remember: Field Set API Names don't contain "__c") of the custom field sets that you created, in accordance with implementation requirements.
      When EditLinesFieldSetName returns an invalid field set, the Quote Line Editor loads, but shows only the Number, Custom Actions, and Drawer Carrot columns.

Optimize Column Widths in Quote Line Editor
To give sales reps the ability to customize the layout of the quote line editor, add the ability to resize column widths. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '20 and later

After an administrator has enabled the feature and assigned users the correct permissions, sales reps can adjust column widths in the quote line editor. This feature is available with Large Quote Experience.

Click-and-drag the edge of the column you'd like to resize. Your changes are auto-saved and they persist, so when you open the quote line editor again you don't have to resize your columns.

You can resize columns, but not rows. When you resize a column in a field set, you don't resize it for other field sets. Navigate to each field set and resize accordingly. There are minimum column widths to ensure that you don't inadvertently hide a column.

To reset your columns to the system default, click the settings gear and choose **Reset Column Widths**.

Table 44: User Permissions Needed

OBJECT	CREATE	READ	UPDATE	DELETE
ColumnMetadata	Yes	Yes	Yes	Yes
FieldSetMetadata	Yes	Yes	Yes	Yes

Considerations

You can resize columns in the full Salesforce site only. The column widths also apply to the Salesforce mobile app. Ensure the column widths you select work for both.

Resetting to the default is available only in the full Salesforce site.

Large Quote Experience
Configure the quote line editor so your sales reps can quickly navigate through quotes with many list items. (Salesforce CPQ Managed Package)

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 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.
- The Quote Total and Group Subtotal fields appear on the quote line and group headers respectively. These fields aren’t visible when Large Quote Experience is disabled.
- 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.
- As of Salesforce CPQ Summer ’19, users can collapse and expand bundles.

Dragging and dropping quote line items isn’t available when Large Quote Experience is enabled.

Default Bundle Setting

The Salesforce CPQ Quote Line package setting Default Bundle Setting lets you control whether bundles appear expanded or collapsed when sales reps first add them to the quote line editor. This setting appears only when the Line Editor package settings Enable Large Quote Experience, Keep Bundles Together, and Visualize Hierarchy are selected. Salesforce CPQ can expand or collapse a bundle in Large Quote Experience only if the Product Name field is part of the Quote Line Editor field set.

Large Quote Performance Settings

Improve the calculation performance for large quotes by using the Large Quote Threshold and Quote Batch Size package settings. (Salesforce CPQ Managed Package)

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. In Salesforce CPQ Summer ’19 and later, you can also include quote-scoped validation rules by selecting Validate Large Quotes in the line editor package settings.

The Large Quote Threshold setting has a null default value, but you can increase it to improve the calculation 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. As a result, quote-scoped product rules evaluate only lines that are currently being added to the quote and ignore previously added lines. This difference can cause quote-scoped product rules to not behave as intended.

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. When Large Quote Threshold is set, quote-scoped alert type product rules aren't supported.

Note:

- When a user clicks **Clone with Related** on a quote that meets the large quote threshold, Salesforce CPQ doesn't consider the large quote threshold for the cloned quote as the cloned quote is created. All post-creation UI calls on the cloned quote consider the large quote threshold. Calculations that impact the quote line editor consider the large quote threshold, even if there's a change to the quote.
- We don't support a summary variable referencing other summary variables in the Variable Element field with large quote validation when the following are true.
  - Summary Variable is used as a condition in a quote-scoped product validation rule.
  - The Large Quote Threshold setting is used.
  - Validate Large Quotes is set to `true`.
  - The quote line is above the large quote threshold.

    As a workaround, make sure the field in the referencing summary variable is part of another validation rule.

Salesforce CPQ Quote Line Fields
Quote lines store information about the products that a sales rep has quoted. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Important: Fields that appear in the quote line editor are defined by the Line Editor field set, which is defined on the Quote, Quote Line, and Quote Line Group objects. After a Salesforce upgrade, sometimes the Line Editor field set doesn't reflect new field restrictions. As a result, some fields in the quote line editor don't behave as expected. If fields don't behave as expected, ensure they're available for the Line Editor field set on the Quote, Quote Line, and Quote Line Group objects.

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 a 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, expressed as 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's quantity can be refunded. Relevant only for amendments.

Field	API Name	Data Type	Definition
Batch Quantity	SBQQ__BatchQuantity__c	Number (10, 2)	If products are sold in batches, this field stores the quantity in each batch. Default value is copied from the product.
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Defines the billing frequency. Values: • 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 field's value overrides the automatic calculation of quantity multiplied by unit price.
Bundled	SBQQ__Bundled__c	Checkbox	The product on this line item is part of a bundle product on this quote. Bundled line items have a price of 0, and price and quantity can't 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.
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 populated only if the line item references a configurable product.

Field	API Name	Data Type	Definition
Component Net Total	SBQQ__ComponentTotal__c	Currency (14, 2)	Net total of components in this configuration. This field is populated only if the 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. Values: • Package • Components • Both
Component Uplifted By Package	SBQQ__ComponentUpliftedByPackage__c	Checkbox	Fixes uplift for this component to the parent bundle uplift. Uplift applies only to multi-segmented products.
Component Visibility	SBQQ__ComponentVisibility__c	Formula (Text)	Indicates 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	This field is no longer supported.
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.
Cost	SBQQ__Cost__c	Lookup (Cost)	Cost record for the line item.
Cost Editable	SBQQ__CostEditable__c	Checkbox	Specifies whether cost can be edited on the line item.
Customer Total	SBQQ__CustomerTotal__c	Formula (Currency)	Customer total price for the quote line item. This total is the net total, excluding any partner discounts.

Field	API Name	Data Type	Definition
Customer Unit Price	SBQQ__CustomerPrice__c	Currency (12, 2)	Customer unit price for the product quoted by the line item. This price is the net unit price, excluding partner discounts.
Default Subscription Term	SBQQ__DefaultSubscriptionTerm__c	Number (5, 0)	Term length of the subscription, which applies only if the product is a subscription. It's 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 of the line item.
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup (Discount Schedule)	Specify discounts in terms of percentage or amount to be discounted from the product's price using quantity purchased or term. Set quantity or term ranges in tiers of different discount percentages. The discount is applied to the list price, and the resulting total is stored in the regular price.
Discount Schedule Type	SBQQ__DiscountScheduleType__c	Picklist	Discount schedule type. Copied from the Type field in the associated discount schedule. Must be a stored value because it's used in rollup formula fields. Values: • Range • Slab
Discount Tier	SBQQ__DiscountTier__c	Lookup (Discount Tier)	Discount tier used by the line item. This field is populated only if a product is volume discounted and the discount schedule is of type Range.

Field	API Name	Data Type	Definition
Distributor Discount	SBQQ__DistributorDiscount__c	Percent (3, 2)	This discount is applied to the partner price and reflected in the net price.
Dynamic Option ID	SBQQ__DynamicOptionId__c	Text (40)	Contains the feature ID and product ID to identify the feature and optional SKU associated with the line item.
Earliest Valid Amendment Start Date	SBQQ__EarliestValidAmendmentStartDate__c	Formula (Date)	The earliest amendment start date allowed, based on previously amended subscriptions.
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 or covered by the 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 (applies only if product is a subscription).
Existing	SBQQ__Existing__c	Checkbox	Indicates that the customer already owns this product. This checkbox 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 line item belongs.

Field	API Name	Data Type	Definition
Generate Contracted Price	SBQQ__GenerateContractedPrice__c	Picklist	Generates a contracted price based on the adjusted quote line if flagged. Values: • Yes • No
Gross Profit	SBQQ__GrossProfit__c	Currency (14, 2)	Gross profit amount on this line item.
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 item is saved to an incomplete database. This flag can be set when price rules are evaluated. Test this field in validation rules to avoid firing the rules prematurely. Don't add this field to a page layout or otherwise update it.
List Total	SBQQ__ListTotal__c	Formula (Currency)	Quantity multiplied by list unit price.
List Unit Price	SBQQ__ListPrice__c	Currency (12, 2)	The list unit price inherits this product's price book entry by default unless a special price type is defined.
Markup	SBQQ__Markup__c	Formula (Currency)	Markup amount on this item. This value is calculated automatically by applying markup rate or absolute amount to the product cost.
Markup (%)	SBQQ__MarkupRate__c	Percent (6, 2)	Markup on the line item, expressed as a percentage.
Markup (Amount)	SBQQ__MarkupAmount__c	Currency (14, 2)	Markup amount for the line item.

Field	API Name	Data Type	Definition
Maximum List Unit Price	SBQQ__MaximumPrice__c	Currency (14, 2)	Maximum unit price for the 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.
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. This field doesn’t override the discounts specified in the Discount Schedule field.
Non Partner Discountable	SBQQ__NonPartnerDiscountable__c	Checkbox	Select this checkbox to make this line item non-discountable for partners.
Number	SBQQ__Number__c	Number (5, 0)	Number indicating this line item's position within its group or quote; its value must be unique within the group or quote.
Optional	SBQQ__Optional__c	Checkbox	Marks this line item as optional; optional line items don't contribute to quote totals and aren’t transferred to the opportunity.
Option Discount (%)	SBQQ__OptionDiscount__c	Percent (3,2)	If this line item 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.

Field	API Name	Data Type	Definition
Option Level	SBQQ__OptionLevel__c	Number (5,0)	Indicates the nesting level of this option (applies only to line items generated from options).
Option Type	SBQQ__OptionType__c	Picklist	Indicates the option type, which is copied from the related product option; determines how quantity is calculated. Types: • 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.
Original Unit Cost	SBQQ__OriginalUnitCost__c	Currency (14,2)	Cost for one unit of product quoted on this line item if cost schedules weren’tapplied.
Package	SBQQ__Bundle__c	Checkbox	Indicates whether this line item represents a bundle, that is, whether it includes other line items in this quote.
Package Cost	SBQQ__PackageCost__c	Formula (Currency)	Total cost of 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.

Field	API Name	Data Type	Definition
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 (32,000)	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 company sells through a channel/VARI, a partner discount can be given on a quote or individual product line item. Partner discounts are applied after all automatic and discretionary discounts. The partner discount is accounted for 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 accounted for in the partner price.
Partner Unit Price	SBQQ__PartnerPrice__c	Currency (12, 2)	Partner unit price. Price after partner discount but before distributor discount.
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.

Field	API Name	Data Type	Definition
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. Values: • Quote • Group
Percent of Total Target Price	SBQQ__SubscriptionTargetPrice__c	Currency (12, 2)	Percentage of the subscription target product price for calculating maintenance.
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 uplift is calculated 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 uplift is calculated for this segment.
Price Dimension	SBQQ__Dimension__c	Lookup (Price Dimension)	Dimension within an MDQ product. Each segment can be priced independently. Each product can contain several price dimensions. Yearly price dimensions are treated as subscriptions.
Price Editable	SBQQ__PriceEditable__c	Checkbox	Flag indicating whether the price is editable for this line item.

Field	API Name	Data Type	Definition
Pricebook Entry ID	SBQQ__PricebookEntryID__c	Id	When you add a product to a quote and save, the resulting quote line inherits its price book entry ID from the product's price book entry ID. When you order the quote, your order products inherit their price book entry IDs from their quote lines.
Pricing Method	SBQQ__PricingMethod__c	Picklist	Indicates how the price for this line item is calculated. List subtracts the discount from the list price. Cost adds markup to the cost. • List • Cost • Block • Custom
Pricing Method Editable	SBQQ__PricingMethodEditable__c	Checkbox	Specifies whether the pricing method can be edited on this line item.
Prior Quantity	SBQQ__PriorQuantity__c	Number (10, 2)	Sum of quantities from prior purchases. **Note:** For internal use only. Do not edit this field.
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 item.
Product Family	SBQQ__ProductFamily__c	Formula (Text)	A category you can use to help you organize this line item in Salesforce (whether it's a new or existing product family). Use this field during product selection to filter to the correct product or product SKU.

Field	API Name	Data Type	Definition
Product Name	SBQQ__ProductName__c	Formula (Text)	Name of the product referenced by this line item
Product Option	SBQQ__ProductOption__c	Lookup (Product Option)	Product option that generated this line item (if any).
Prorated List Price	SBQQ__ProratedListPrice__c	Currency (16, 2)	Prorated list unit price.
Prorated Unit Price	SBQQ__ProratedPrice__c	Currency (12, 2)	Prorated price of the product quoted by this line item. This price differs from the special price only if the product is a subscription and the line item is prorated.
Prorate Multiplier	SBQQ__ProrateMultiplier__c	Number (4, 4)	Calculated ratio used to compute prorated price.
Quantity	SBQQ__Quantity__c	Number (10, 2)	Quantity 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 is 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 renewed product. This field is set to true only for non-subscription products for quote type Renewal. Under normal circumstances, this field isn’t modified via the 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 item renews.
Required By	SBQQ__RequiredBy__c	Lookup (Quote Line)	Links this line item to another line item in the same quote whose product requires this line item's product.

Field	API Name	Data Type	Definition
Segment Index	SBQQ__SegmentIndex__c	Number (2, 0)	For multi-segmented products, the index representing this quote line item's position in the segment table.
Segment Key	SBQQ__SegmentKey__c	Text (30)	For multi-segmented products, a shared key used to group multi-dimensional quote line items.
Segment Label	SBQQ__SegmentLabel__c	Text (25)	For multi-segmented products, the column header label (for example, "Year 1") associated with this line item. Salesforce CPQ generates the segment label with double spaces between the segment and number.
Source	SBQQ__Source__c	Lookup (Quote Line)	Source of the cloned quote line item.

Field	API Name	Data Type	Definition
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 the special price type is Contract, your special price uses the value of the current contracted price record that is 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 the special price type is Custom, admins can provide their own value in the special price field. Salesforce CPQ uses the special price in calculating the quote line item price. However, the quote line item still maintains a value for the list unit price. If the list price is zero, the special price doesn't affect the calculation. Amendment quote

Field	API Name	Data Type	Definition
Special Price Description	SBQQ__SpecialPriceDescription__c	Text (80)	Name of the discount tier or contracted price applied to achieve the special price for this line item.
Special Price Type	SBQQ__SpecialPriceType__c	Picklist	Stores the type of special price offered on this line item. A null value indicates that there's no special pricing. Under normal circumstances, this field isn't modified via the UI.
Start Date	SBQQ__StartDate__c	Date	Date the service represented by this line item begins (applies only if the product is a subscription).
Subscribed Asset IDs	SBQQ__SubscribedAssetIds__c	Long Text Area (19,000)	Comma-separated list of asset IDs covered by the subscription line. Only applicable to renewal quotes. Don't 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 isn't a subscription. Values: • Fixed Price • Percent of Total
Subscription Term	SBQQ__SubscriptionTerm__c	Number (5, 0)	Term for the subscription product in the line item. If the product isn't a subscription, this value has no effect.

Field	API Name	Data Type	Definition
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's value is null. For a new quote line item, the value is conditionally mapped from the default subscription type. The conditional picklist values are as follows: • Default subscription type = One-Time and available subscription type = One-Time • Default subscription type = Renewable and available subscription type = Renewable • Default subscription type = Renewable/ Evergreen and available subscription type = Renewable or Evergreen • Default subscription type = Evergreen and available subscription type = Evergreen
Taxable	SBQQ__Taxable__c	Checkbox	Indicates whether products in records related to this account are taxable. By default, selecting this field doesn't perform actions in Salesforce CPQ. For example, selecting this field doesn't prevent the product from being added to quotes and orders for non-taxable accounts. However, Avalara for Salesforce CPQ evaluates the Taxable field when performing tax calculations.

Field	API Name	Data Type	Definition
Term Discount	SBQQ__TermDiscount__c	Currency (12, 2)	Discount calculated by applying the subscription term against the term discount schedule.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup (Discount Schedule)	Schedule for discounts based on subscription term. This field is useful when you want to show a breakdown of payments in separate groups for different terms, yet you want to apply the discount 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)	This field is deprecated.
Upgraded Asset	SBQQ__UpgradedAsset__c	Lookup (Asset)	The asset that this quote line is upgrading. When the quote is contracted, this asset's Usage End Date field is populated to indicate it's been retired.
Upgraded Quantity	SBQQ__UpgradedQuantity__c	Number (10, 2)	Portion of this line item's prior quantity upgraded to another product.

Field	API Name	Data Type	Definition
Upgraded Subscription	SBQQ__UpgradedSubscription__c	Lookup (Subscription)	The subscription that this quote line is upgrading. When the quote is contracted, this subscription's Terminated Date field is populated.
Uplift	SBQQ__Uplift__c	Percent (7, 2)	Uplift is applied as a percentage against the previous year's price. The resulting price is entered in the Regular Price field on top of special or contracted prices. Uplifts compound year after year. Uplift can't be applied to the first year of a subscription.
Uplift (Amount)	SBQQ__UpliftAmount__c	Currency (10, 2)	Uplift (Amount) is measured as a currency amount. This field is system calculated, because uplift can only be applied to MDQ segments in percentages.
Volume Discount	SBQQ__VolumeDiscount__c	Percent (12, 2)	Discount schedules let you 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 the subscription term.

Related reference

Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it's important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Enable Large Configurations

If Salesforce CPQ hits Salesforce governor limits while configuring a large bundle, it times out and aborts the configuration process. Enable large configurations in Salesforce CPQ package settings or individual products to decrease the likelihood of hitting governor limits when your sales reps configure a large bundle. (Salesforce CPQ Managed Package)

Related concepts

Product Bundles in Salesforce CPQ

A bundle is a product with optional features or components that you want to include on a single quote line. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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

Change a bundle product's Configuration Type field to control when sales reps are required to configure a bundle. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

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. (Salesforce CPQ Managed Package)

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.

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.

Related concepts

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

Enable Large Configurations

If Salesforce CPQ hits Salesforce governor limits while configuring a large bundle, it times out and aborts the configuration process. Enable large configurations in Salesforce CPQ package settings or individual products to decrease the likelihood of hitting governor limits when your sales reps configure a large bundle. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '18 and later

Enabling large bundle processing causes longer loading times between saving a bundle configuration and returning to the quote line editor or the next bundle. To avoid unnecessary loading times in your org, we recommend enabling large bundle processing only if you've already encountered configuration timeouts.

The number of records that cause a configuration timeout vary by user. However, we've found that users tend to hit governor limits at around 100 product options in a bundle. Related records such as option constraints, configuration rules, and configuration attributes also add to the likelihood of hitting governor limits.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Find the Salesforce CPQ package and click **Configure**.
3. Click **Additional Settings**.
4. Select **Enable Large Configurations**. Salesforce CPQ will apply large configuration processing when configuring any of your org's bundles products.

   In Salesforce CPQ Summer '19 and later, you can also enable large configurations on specific bundle parents by selecting the product's Enable Large Configurations field. We recommend enabling product-level large configurations so that Salesforce CPQ doesn't spend longer loading times on small bundles that wouldn't otherwise hit governor limits. Users upgrading to Salesforce CPQ Summer '19 from an earlier version should add Enable Large Configurations to their product page layout.

Related information

Apex Governor Limits

Product Rules in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Note: To get started, explore Product Rules in Salesforce CPQ on Trailhead.

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.

Important: When you're using features with the option selection method set to Dynamic, selected products aren't considered product options by product or price rules, unless the Dynamic feature is the child of a product option.

- Product Actions in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Alert Rules

Alert rules provide informational messages during configuration or pricing. Unlike a validation rule, alert rules let you save your configuration or quote without having to change anything. They're useful for providing suggestions on optimal but nonrequired configurations and pricing processes such as best practices. (Salesforce CPQ Managed Package)

- Selection Rules

Set up your product rules to automatically add, remove, hide, enable, or disable options in a bundle. (Salesforce CPQ Managed Package)

- Filter Rules and Dynamic Bundles in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Product Rule Guidelines

Consider key guidelines when you're creating a product rule. (Salesforce CPQ Managed Package)

Product Actions in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

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. (Salesforce CPQ Managed Package)

Product Action Fields

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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	This field must be selected on product actions for selection rules with Type fields set to Add, Enable & Add, or Show & Add. When the product rule fires in the quote line editor, Salesforce CPQ performs the selection rule on the product defined in the action’s Product field. This field must be deselected on product actions for all other types of selection rules.
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 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 a Product field that you want to filter your product options by.
Filter Value	Choose the value on your filter field for filtering your product options. The filter field must be a Product field. Selection rules use the filter field and filter value to apply the selection type to all product options that match product records. 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 Object, Value Field, and Value Attribute	Only filter rules can use value objects, value fields, and value attributes. Use the value object and value field to filter product options based on a predetermined value rather than a value that you manually set in the Filter Value field. This setup lets 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, 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 and their related products. You'd also need a value object of Quote, a value field of Deployment Type, and an operator set to Equals.

If your value field is a global configuration attribute, use the Value Attribute field to select one of its attributes.

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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.

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '16 and later.

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.

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 45: 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 46: 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 47: Parent Bundle Condition Level = 1 and Child Bundle Condition Level = None

Grandparent Quantity	Parent Quantity	Child Quantity	Result
2	2	2	Validation Passes
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 48: 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
Alert rules provide informational messages during configuration or pricing. Unlike a validation rule, alert rules let you save your configuration or quote without having to change anything. They're useful for providing suggestions on optimal but nonrequired configurations and pricing processes such as best practices. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

To configure a product rule as an alert rule, set the Type field to Alert and the Evaluation Event field to Save. 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 making changes.

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. (Salesforce CPQ Managed Package)

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. You can also set your configuration rule's product field to a specific bundle so your product rule can target that bundle across multiple quotes.

Only product selection Load rules run on the option lookup page.

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.

Type	**Description**
Remove	Deselect the specified option. Not supported for quote-scoped selection rules.
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.

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

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: Red
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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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.

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.

Related concepts

Guidelines and Considerations for Using Nested Bundles
A nested bundle lets users select from a subset of options within a single product option. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Filter Rules and Dynamic Bundles in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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.

Your action's filter field evaluates only fields on the product option. To evaluate a product field, make an exact duplicate of that field on the product option and use it for your filter field instead.

When you contract a dynamic bundle, the resulting asset, subscription, or contract line item has a value in its Dynamic Option ID field. The dynamic option ID represents a combination of the feature ID and product ID, which lets you identify the feature and product associated with the dynamic bundle.

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.

Dynamic bundle custom fields aren't populated with values until a corresponding entry for the field is added to the Search Results field set. For this reason, these fields appear when you're looking up products to add to the quote.

Important: If Percent of Total is added as an option to Dynamic features, that product's reconfiguration isn't supported on the product configuration page.

Related information
Knowledge Article: Use Case: Creating a Filter Product Rule; Dynamic Bundles in Salesforce CPQ

Product Rule Guidelines
Consider key guidelines when you're creating a product rule. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

- Error conditions pass if any of the quote lines meet their conditions. Salesforce CPQ compares lookup query data to all quote lines, not only the lines that pass error conditions.
- 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 configurator
  - Edit: when the user changes a field in the configurator
  - Save: when the user saves (via the Save or Quick Save buttons) a quote in the configurator
  - 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, ensuring 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.
- Configurator-scoped product rules of type Validation/Selection can't be evaluated against dynamic features.
- Product-scoped product rules can't use Quote Line as a tested object in their error conditions.
- Salesforce CPQ doesn't support selection rules that add products from different price books. Instead, create unique selection rules to handle product selection from different price books.
- When you're using features with the option selection method set to Dynamic, selected products aren't considered product options by product rules or price rules.
- Quote-scoped product rules can't use Product Option or Configuration Attributes as tested objects in their error conditions.
- Quote-scoped product rules run only during product selection or bundle configuration. If the product rule's error condition is based on quote or quote line data, Salesforce CPQ doesn't evaluate the error condition until quote lines are added, which can require a second save during product bundle reconfiguration or product selection.
- When a quote-scoped product rule adds a product, the product is last in the quote line's numbering order. If the price rule evaluates multiple quote lines, the quote line's number can affect price rule evaluation.
- Quote-scoped product selection rules add a product to a quote only one time. If the product exists on the quote or the product is added to the quote when the quote-scoped product selection rule is applied, the rule doesn't add the product.
- Product-scoped product rules can't use Quote Line Group as a tested object in their error conditions. These conditions will work on initial configuration, but not on reconfiguration.

Discounts in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

- Discount Schedules in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Pricing Guidance in Salesforce CPQ

Pricing guidance uses Salesforce Analytics to create recommended discounts based on historical pricing trends. You can then assign pricing guidance to your products. When a sales rep adds a product with pricing guidance to their quote, they can see the target, norm, and floor discount recommendations in the quote line editor. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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 that they can't exceed. (Salesforce CPQ Managed Package)

- Compound Discounts in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Discount Categories in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Discount Schedules in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

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 by clicking **Edit 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. Only range-type discount schedules can be term discount schedules.
- 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 aren't allowed on partial orders.

The Discount Unit field defines the type of discount applied to your quote line:

Note: The Discount Unit value Price isn't supported.

- Percent: Applies the discount as a percentage of your quote line's list price.
- Amount: Applies the discount as an amount taken off your quote line's list price. 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.

Note:

- Sales reps with read-only access to discount tier and its fields can create discount tiers by cloning an existing record. To prevent them from creating or modifying discount tiers, remove the Clone button from the page layout or remove the sales rep's user access to the EditDiscountTiers custom page.
- For block pricing, the upper bound and lower bound lengths and decimals places are (12,0). However, for the Quote Line Quantity field (SBQQ__Quantity__c), the decimal places are (10,2). An error occurs when the customer inputs a quantity in the billions: "Quantity: value outside of valid range on numeric field: 1.0E10."

- 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. (Salesforce CPQ Managed Package)

- 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. However, this setup isn't compatible with One per Unit asset conversion. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Custom Quantity Discount Schedules in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Discount Schedule Fields

Use discount schedule fields 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. (Salesforce CPQ Managed Package)

Related information

Knowledge article: Updates to CPQ Discount Schedules and Block Price Tiers Can Modify Saved Quotes

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

If you assign a discount schedule to a subscription product's Term Discount Schedule field, Salesforce CPQ evaluates the schedule's discount tiers by subscription term length instead of quantity. For example, if your first discount tier had bounds of 0 through 11 and your product had a subscription term of 5 months, it would fall in the first tier. Use this feature to control discount schedule pricing based on a subscription product's Term instead of its Quantity. Only range-type discount schedules can be term discount schedules.

If you're using a term discount schedule, we recommend naming your tiers by term periods for ease of reference.

Note:

- Salesforce Billing doesn't support invoicing an amendment order product related to a product that has a term discount schedule.
- Amendment quotes don't support quote lines for a product that has a term discount schedule and a slab discount schedule.
- Term discount schedules and volume discount schedules apply in parallel based on List Unit Price.

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
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. However, this setup isn't compatible with One per Unit asset conversion. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '18 and later

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.

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’16 and later

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.

     Important: In the quote line editor, the discount schedule editor can show only the standard Quantity field (SBQQ__Quantity__c). If the discount schedule’s Quote Line Quantity Field (SBQQ__QuoteLineQuantityField__c) references a different quantity field, Salesforce CPQ still uses Quantity for showing the discount schedule tier, while using the value of Quote Line Quantity Field for calculations. If Quote Line Quantity Field has a null value, Salesforce CPQ also uses Quantity for calculation.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’16 and later

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, and 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.

When you save in the quote line editor, Salesforce CPQ creates quote lines after the save action. Therefore, if you add a product with a discount schedule, edit the discount schedule, then save the quote, Salesforce CPQ doesn't populate the discount schedule's Quote Line field. If you want the discount schedule's Quote Line field to populate consistently, add your product first, save the quote, and then edit the discount schedule.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

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. The user input value for Unit Cost is ignored for products with a cost schedule even if Cost Editable is set to true. In this case, unit cost is derived from the cost defined on the product. If you have markup prices, Salesforce CPQ applies those next.

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.

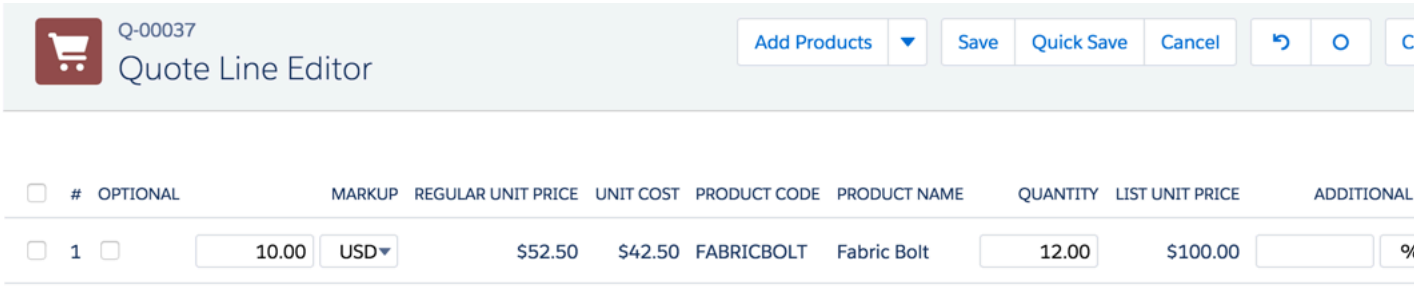
1. Add the Cost Schedule field to your product page layout.
2. Go to one of your cost-priced products.
3. Give your product's Cost Schedule field a lookup to one of your discount schedules.

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 in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

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. 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 the Discount Schedule tier is assigned based on the Quote Line's Fabric Length value.

- 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. (Salesforce CPQ Managed Package)

Create a Discount Schedule Based on Custom Fields
Create a discount schedule that evaluates a custom quote line field to determine its discount tier. (Salesforce CPQ Managed Package)

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. However, if this custom field doesn't have a value when Salesforce CPQ first loads the discount schedule in the quote line editor, the discount tier uses the quote line's quantity instead. 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 isn't 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. (Salesforce CPQ Managed Package)

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 exactly one unit above the upper bound of the highest block price tier. These bound values can't overlap.

Your company sells wireless routers with a list price of $100 and the following block prices. 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 49: Block Prices

Price Name	Lower Bound	Upper Bound	Price
1	1	21	$2,000
2	21	41	$3,500
3	41	61	$4,750

Table 50: 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 51: 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

Quote Line Quantity	Calculation	Price
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. • 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 = $5,550.	$5,550

Discount Schedule Fields
Use discount schedule fields 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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Discount Schedule Fields

Account	If a sales rep creates a discount schedule in the quote line editor, the Account field looks up to that quote's account.
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 by using this discount schedule. • Quote: Combine line items in the quote. • Group: Combine line items in the group. Discount schedules that use cross orders or cross products require a Group aggregation scope. • None: The schedule evaluates each line item independently, even for the same product. Default setting. • **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. Slab discount schedules don't support aggregation scopes.

Constraint Field	If you use cross-order discount schedules, limit the records Salesforce CPQ considers to records with matching fields. The field must exist on both the quote line that's evaluated and the subscriptions and assets that the discount schedule evaluates the quote line against. The constraint field can't be a formula field. This feature doesn't work with amendments, because amendments don't look up to other orders.
Cross Orders	Discount schedules include previously purchased quantities of a line item for a 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 it evaluates the current quote line against volume discount tiers. Salesforce CPQ evaluates this field only on primary quotes. Subscriptions or assets from expired or inactive contracts aren't included in the quantity calculation for a quote line with a cross-order discount schedule.
Cross Products	This discount schedule combines the quantities of all products on the quote when the schedule evaluates line quantity against volume discount tiers.
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 doesn't 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.
Order	The order that the discount schedule applies to.
Order Product	The order product that the discount schedule applies to.
Original Discount Schedule	The discount schedule that is overridden to create the current discount schedule.
Price Scale	Decimal places for the prices that the discount schedule calculates. Controls the number of decimal places that appear in the Discount Schedule Editor within the quote line editor.
Quote Line Quantity Field	Calculates discount schedule pricing. This field isn't supported on amendment quotes.
User Price for Amount	If you select this field, the discount schedule's tiers show the target price instead of the discount amount in the line editor.

User Defined	This field indicates whether the discount schedule is created by an end user or by an admin.
Price Book	Apply this discount schedule to a product from only 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.
Quote	The quote that contains a quote line with this discount schedule.
Quote Line	The discount schedule applies to this quote line. Salesforce CPQ uses this field to track the related quote line only when sales reps can edit the line's discount schedule while the Override Behavior field is Current Tier Only or All. Otherwise, the discount schedule still applies to the quote line, but this field doesn't show a value. Salesforce CPQ assigns this field a quote line lookup only after sales reps add a product and save the quote, then edit the quote line's discount schedule or add a discount schedule, and save the quote again.
Override Behavior	Defines whether sales reps can edit this discount schedule's discount tiers in the quote line editor.
Schedule Name	We recommend that you give your discount schedule a name that makes it easy for you to tell it 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 the tier that 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. You can't use slab discount products on partial orders.

Discount Tier Fields

Currency	Salesforce CPQ supports currency values on discount tiers only in multi-currency orgs and only for price-based discount schedules.

Discount	To apply discounts to products with quote line ranges that fall within this tier, enter a discount percentage or amount.
Lower Bound	Enter the smallest quantity to include within this tier.
Name	We recommend that you give your discount tier a descriptive name.
Upper Bound	Enter the largest quantity to include within this tier. This value isn't 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.

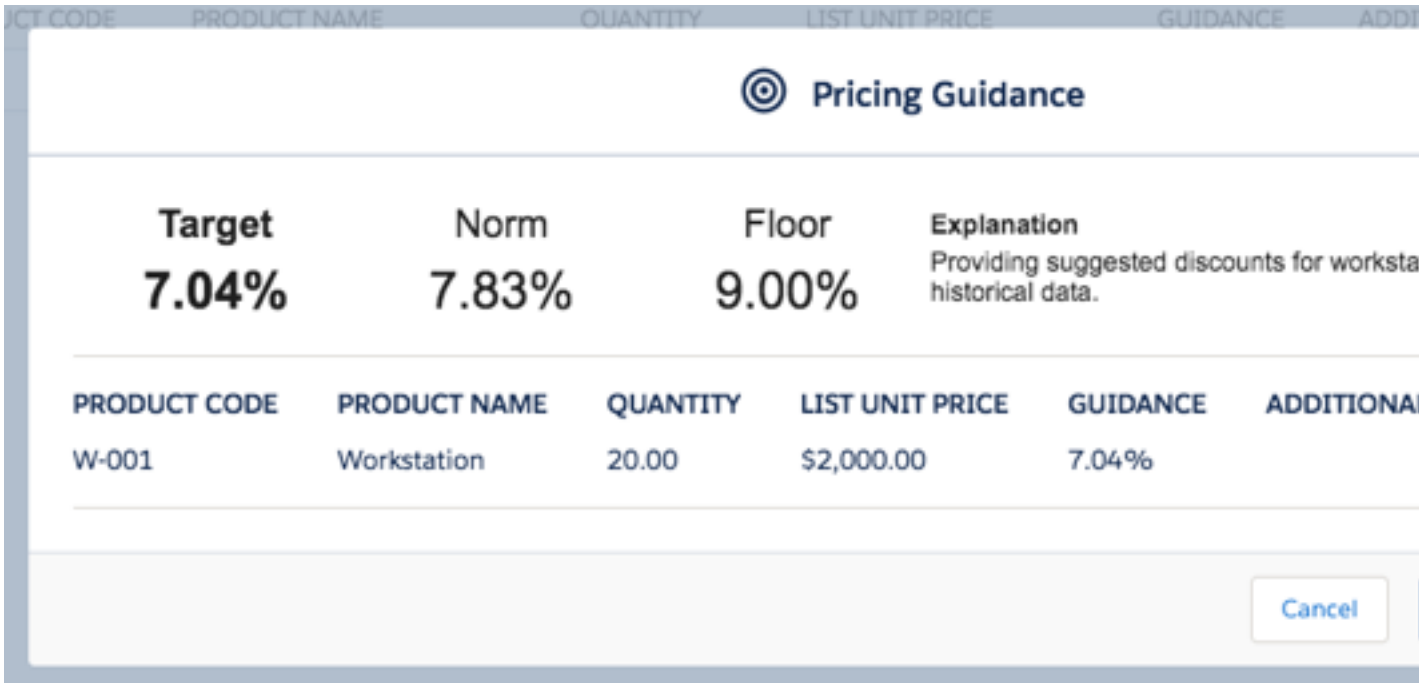
Pricing Guidance in Salesforce CPQ

Pricing guidance uses Salesforce Analytics to create recommended discounts based on historical pricing trends. You can then assign pricing guidance to your products. When a sales rep adds a product with pricing guidance to their quote, they can see the target, norm, and floor discount recommendations in the quote line editor. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '19 and later

When sales reps add a product with pricing guidance to their quote, the quote line's icon lets them open the Pricing Guidance detail page. The detail page shows discount values based on historical guidance and pricing strategist revision. The target discount is highlighted as the ideal discount, while the norm and floor discounts give the sales rep context when choosing whether to accept the target discount.

Note: To indicate that there's no discount, leave the discount field empty. Don't use 0% for the discount value.



Target	The lowest ideal discount. This value maximizes the sale price for the sales rep while still providing customer purchase incentive through a discount.
Norm	A mid-range discount that represents a middle ground between the target and floor discounts. Many admins set the norm discount close to the median discount.
Floor	The highest recommended discount. This value represents a generous discount used only in special circumstances, such as a final incentive to close a deal or to prevent the attrition of a long-time customer.

If the sales rep clicks **Accept Recommended Price**, Salesforce CPQ applies the target discount in the Additional Discount field on their quote line. The sales rep manually enters the median or floor discounts. Based on your org's approval settings, discounts from pricing guidance may still require further approval.

- What Does Pricing Guidance Do?

Pricing guidance uses historical quote data to evaluate the total discounts of products on previous quotes and determine the median discount percentage for those products. Then, you can customize target, norm, and floor discounts as percentages relative to the median discount. You can define filters for the type of quotes and products included in the evaluation. When a sales rep adds a product with pricing guidance to their quote, then can apply the target discount and view the norm and floor discounts for additional context. You can create pricing guidance manually or use CRM Analytics for advanced quote analysis. (Salesforce CPQ Managed Package)

- Set Up Pricing Guidance With CRM Analytics

Drive your sales team close deals by providing them with pricing guidance based on product pricing trends. Use CRM Analytics to create a pricing guidance record and apply it to one or more products. Edit the pricing guidance record for greater control over discount values and quantity ranges. (Salesforce CPQ Managed Package)

- Create Pricing Guidance Manually

Users without CRM Analytics can create a pricing guidance record and define its discounts and tiers manually. (Salesforce CPQ Managed Package)

- Things to Know About Pricing Guidance

Check out guidelines, considerations and useful tips for working with pricing guidance. Review pricing guidance field definitions and permissions. (Salesforce CPQ Managed Package)

- Price Your Quote Lines with Pricing Guidance

The next time you're closing a deal, check out pricing guidance to view target discounts based on historical sales information. (Salesforce CPQ Managed Package)

What Does Pricing Guidance Do?

Pricing guidance uses historical quote data to evaluate the total discounts of products on previous quotes and determine the median discount percentage for those products. Then, you can customize target, norm, and floor discounts as percentages relative to the median discount. You can define filters for the type of quotes and products included in the evaluation. When a sales rep adds a product with pricing guidance to their quote, then can apply the target discount and view the norm and floor discounts for additional context. You can create pricing guidance manually or use CRM Analytics for advanced quote analysis. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

- Differences in Pricing Guidance Methods

Salesforce CPQ lets you use CRM Analytics to automate pricing guidance creation based on historical quote data, or allows for manual definitions of pricing guidance and guidance tiers. Before you start working with pricing guidance, review the differences between each method. (Salesforce CPQ Managed Package)

- Calculating Guidance Tiers for Pricing Guidance

Use CRM Analytics to filter products by name, quote line quantity, quote status, and quote creation date on the Create Pricing Guidance page. After Salesforce CPQ evaluates the median Total Discount field, you can define high, medium, and low recommended discounts. (Salesforce CPQ Managed Package)

- Making Useful Guidance Filters

The Create Pricing Guidance page provides you with several ways to filter the products and quotes that you evaluate. We've provided some helpful tips for making filters that show exactly the types of products you're looking for. (Salesforce CPQ Managed Package)

- Reports for Pricing Guidance Usage

Quote line pricing guidance records include fields that track whether a sales rep viewed the guidance in the quote line editor and whether they used the guidance's target discount. When used in reports, the fields help you determine whether pricing guidance improves sales. (Salesforce CPQ Managed Package)

Differences in Pricing Guidance Methods

Salesforce CPQ lets you use CRM Analytics to automate pricing guidance creation based on historical quote data, or allows for manual definitions of pricing guidance and guidance tiers. Before you start working with pricing guidance, review the differences between each method. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '19 and later

Pricing Guidance with CRM Analytics	Users with CRM Analytics Plus licenses can use the Create Pricing Guidance page to analyze historical quote line discount values. You can filter quotes based on status and creation date, and filter quote lines based on products. After you've defined your filters, CRM Analytics shows you the median discounts for matching quote lines. Quote lines are grouped into tiers based on quantity ranges. You can then define target, norm, and floor discounts in each tier as percentages relative to the median discount. When you're done defining discounts, you can save your information as a view. Salesforce CPQ then creates a pricing guidance record with tiers based on your view in the Create Pricing Guidance page. Use the Create Pricing Guidance page only for the creation of new Pricing Guidance records. To change pricing guidance tiers and discounts, edit the pricing guidance record and its tier records directly.
Manual Pricing Guidance	Users without CRM Analytics must create a pricing guidance record and define each tier manually.

We strongly recommend creating pricing guidance with CRM Analytics. The CRM Analytics platform lets you quickly evaluate large volumes of historical pricing data, and automates the creation of guidance tiers. When you evaluate historical pricing manually, you run risk of missing important trends. Manually creating enough guidance tiers to provide accurate discount ranges can also be time-consuming.

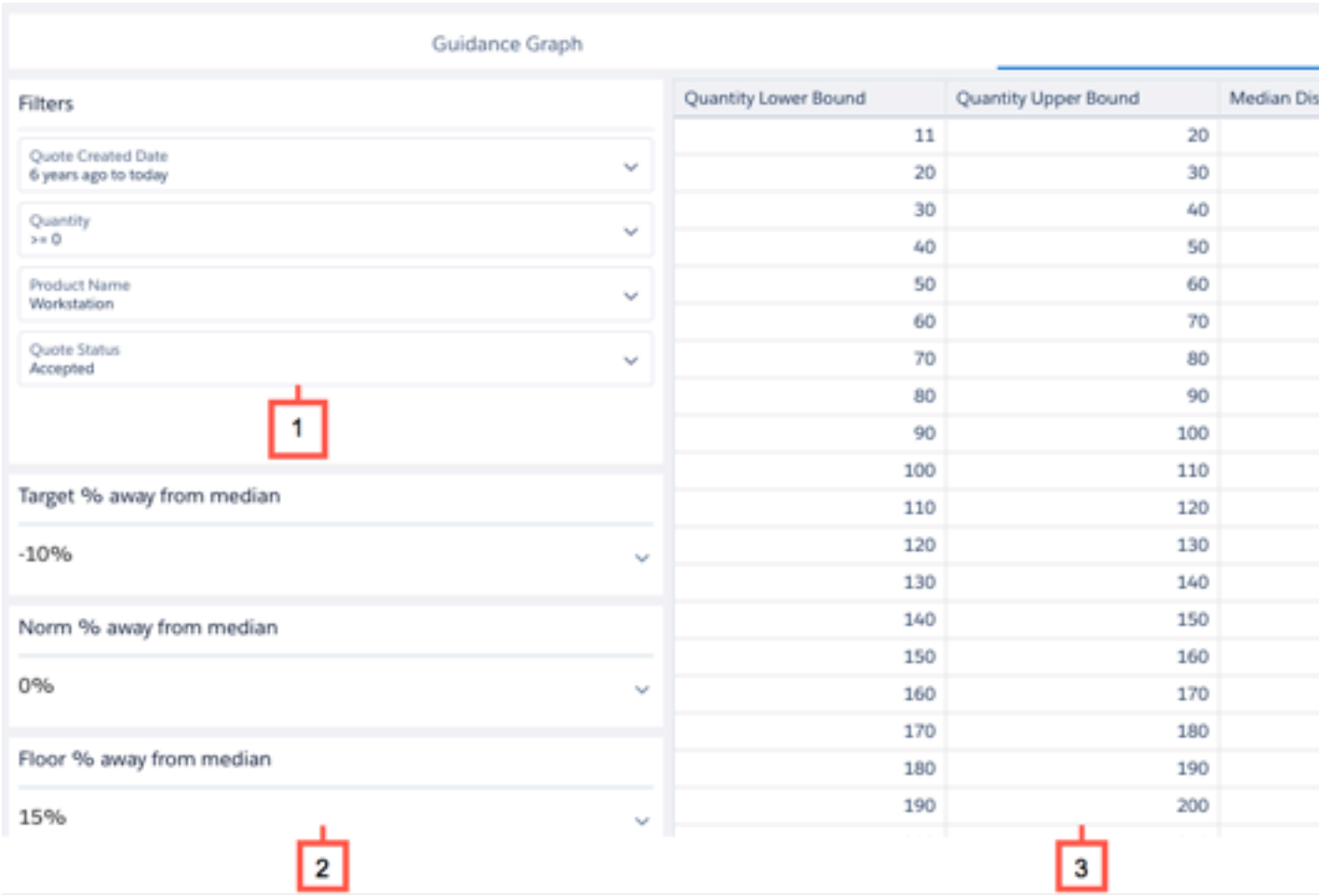
If you're using CRM Analytics, continue to Calculating Guidance Tiers for Pricing Guidance and then check out Set Up Pricing Guidance With CRM Analytics. If you plan to create pricing guidance records manually, jump to Create Pricing Guidance Manually. Users of both methods should check out Things to Know About Pricing Guidance for guidelines and considerations.

Calculating Guidance Tiers for Pricing Guidance
Use CRM Analytics to filter products by name, quote line quantity, quote status, and quote creation date on the Create Pricing Guidance page. After Salesforce CPQ evaluates the median Total Discount field, you can define high, medium, and low recommended discounts. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later for users with a CRM Analytics Plus license

When you open the Create Pricing Guidance page, the Guidance Graph shows you an overview of pricing guidance discount percentages based on quote line quantity ranges. For a detailed look at discount values, click **Guidance Tiers**.

Let's review a sample Guidance Tiers page.



The Filters section (**1**) lets you define parameters for the quote lines you want to evaluate. In this case, the pricing analyst is filtering quote lines for products named Workstation, with quantities of 0 or greater, on accepted quotes created within the last 6 years. Salesforce CPQ supports only the predefined fields as filter options.

The Guidance Tiers section (**2**) lets you define percentages for your target, norm, and floor discounts. Each discount is a percentage of the median discount percentage for a quantity range. For example, the pricing analyst sets the target discount as -10% from the median. If a quote line quantity's median discount is 12%, the target discount is 10.8%.

Note: You can apply positive or negative percentages away from the median for the target, norm, and floor discount percentages. We recommend making the target and norm discounts lower than the median, and making the floor discount higher than the median.

The Pricing table (**3**) shows your median discount and quantity ranges based on your filters, and your suggested discounts based on your Discount Ranges. When you update a filter or discount range and apply the changes, Salesforce CPQ updates the Pricing table accordingly.

- Each row represents one pricing tier for your pricing guidance. When a sales rep loads pricing guidance in the quote line editor, Salesforce CPQ shows them the suggested discounts for the pricing tier that contains their quote line quantity.
- Discounts apply up to, but not including, the value in the upper bound column. For example, the first row applies to quote line quantities of 11 through 19, and the second row applies to quote line quantities of 20 through 29.
- Salesforce CPQ initially creates tiers so that each tier evaluates at least 30 total quote lines. The quote line with the lowest quantity sets the Quantity Lower Bound and the quote line with the highest quantity sets the Quantity Upper Bound.
- If the total number of evaluated quote lines is below 30, Salesforce CPQ includes them all in one tier. If there's an overlap between tiers, Salesforce CPQ combines their quote lines into one tier. For example, during initial evaluation, your first has 30 quote lines each with a quantity of one. The second tier has 23 quote lines with quantities of one and two. Since there's overlap of quantity-one quote lines, Salesforce CPQ combines them into one tier that evaluates 53 total quote lines. The tier has a lower bound 1 and an upper bound of 3.
- The median discount represents the median of Total Discount field values for all quote lines in a quantity bound range.

Making Useful Guidance Filters
The Create Pricing Guidance page provides you with several ways to filter the products and quotes that you evaluate. We've provided some helpful tips for making filters that show exactly the types of products you're looking for. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '19 and later for users with an EinsteinAnalyticsPlus license

- Take note of time periods that had an unusual or unexpected influence on your overall pricing trends. For example, a month-long holiday sale or two weeks of suspended sales during a company acquisition can increase the median discount over a three-month period.
- We recommend setting the Quote Status filter to Accepted. This filter evaluates discounts from only won deals, where discounts likely helped make a sale.

- You can include more than one product in your filter's scope, and assign the pricing guidance record to each product . This type of setup is useful for applying guidance to products that share a theme or model type.
- To avoid skewed recommendations, consider combining similar products in a filter when one of the products has a low quantity. For example, if you sold 500 standard workstations and 5 premium workstations, and filter on the 5 premium workstation only, you run the risk of unrealistic discount information.
- To apply discounts based on factors besides quote line quantity or product, use price rules.

Reports for Pricing Guidance Usage
Quote line pricing guidance records include fields that track whether a sales rep viewed the guidance in the quote line editor and whether they used the guidance's target discount. When used in reports, the fields help you determine whether pricing guidance improves sales. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '20 and later

When you use pricing guidance with quotes, Salesforce CPQ makes a quote line pricing guidance record for the resulting quote line. This record represents the specific pricing guidance applied to the quote line in the quote line editor. The quote line pricing guidance record inherits the floor, norm, and target discount values from the product's pricing guidance record.

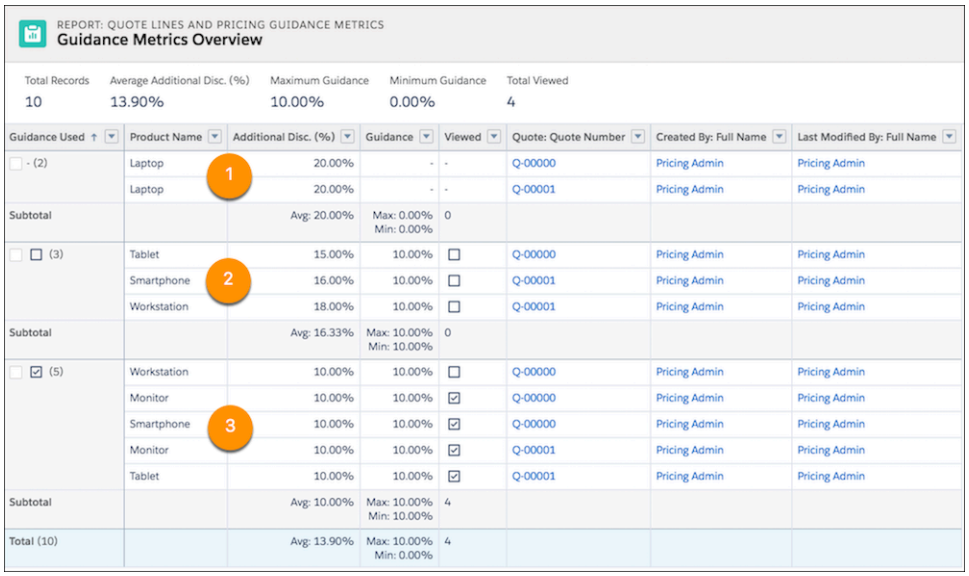
In Salesforce CPQ Winter '20, we added two fields that let you track whether sales reps viewed the guidance and whether they accepted its target discount.

Viewed	Salesforce CPQ selects this field when a sales rep clicks a quote line's Pricing Guidance icon, then saves or quick saves the quote.
Guidance Used	Salesforce CPQ selects this field when a sales rep applies an additional discount that matches the Target Discount on the quote line's pricing guidance.

Here's a simple report template that groups the rows by the Guidance Used field.

Group Rows	Guidance Used
Columns	Product Name Additional Discount (%) Guidance Viewed Quote: Quote Number Created by: Full Name Last Modified By: Full Name

Let's run this report in a sample org. Since we grouped rows by the Guidance Used field, the report shows us quote lines where pricing guidance wasn't available (1), where pricing guidance wasn't used (2), and where pricing guidance was used (3).



REPORT: QUOTE LINES AND PRICING GUIDANCE METRICS
Guidance Metrics Overview

Total Records	Average Additional Disc. (%)	Maximum Guidance	Minimum Guidance	Total Viewed
10	13.90%	10.00%	0.00%	4

Guidance Used	Product Name	Additional Disc. (%)	Guidance	Viewed	Quote: Quote Number	Created By: Full Name	Last Modified By: Full Name
- (2)	Laptop	20.00%	-	-	Q-00000	Pricing Admin	Pricing Admin
	Laptop	20.00%	-	-	Q-00001	Pricing Admin	Pricing Admin
Subtotal		Avg: 20.00%	Max: 0.00% Min: 0.00%	0			
(3)	Tablet	15.00%	10.00%	☐	Q-00000	Pricing Admin	Pricing Admin
	Smartphone	16.00%	10.00%	☐	Q-00001	Pricing Admin	Pricing Admin
	Workstation	18.00%	10.00%	☐	Q-00001	Pricing Admin	Pricing Admin
Subtotal		Avg: 16.33%	Max: 10.00% Min: 10.00%	0			
(5)	Workstation	10.00%	10.00%	☐	Q-00000	Pricing Admin	Pricing Admin
	Monitor	10.00%	10.00%	☑	Q-00000	Pricing Admin	Pricing Admin
	Smartphone	10.00%	10.00%	☑	Q-00000	Pricing Admin	Pricing Admin
	Monitor	10.00%	10.00%	☑	Q-00001	Pricing Admin	Pricing Admin
	Tablet	10.00%	10.00%	☑	Q-00001	Pricing Admin	Pricing Admin
Subtotal		Avg: 10.00%	Max: 10.00% Min: 10.00%	4			
Total (10)		Avg: 13.90%	Max: 10.00% Min: 0.00%	4			

Set Up Pricing Guidance With CRM Analytics
Drive your sales team close deals by providing them with pricing guidance based on product pricing trends. Use CRM Analytics to create a pricing guidance record and apply it to one or more products. Edit the pricing guidance record for greater control over discount values and quantity ranges. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later for users with a CRM Analytics Plus license

- Enable Pricing Guidance in Salesforce CPQ

Before you can enable pricing guidance for users, you must configure certain Salesforce, Tableau CRM, and Salesforce CPQ settings. (Salesforce CPQ Managed Package)

- Create and Apply Pricing Guidance with CRM Analytics

Create a pricing guidance record with suggested discounts based on historical product discount data. Assign it to a product or products so that sales reps can view pricing guidance when they add the products to their quotes. (Salesforce CPQ Managed Package)

- Edit Pricing Guidance Records

Sometimes the pricing tier generation logic doesn’t match what your pricing guidance needs. When you want to change the default suggested discount values or quantity bound ranges, edit the pricing guidance and pricing tier records. (Salesforce CPQ Managed Package)

Enable Pricing Guidance in Salesforce CPQ
Before you can enable pricing guidance for users, you must configure certain Salesforce, Tableau CRM, and Salesforce CPQ settings. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

User Permissions Needed	
To make configuration changes and enable Pricing Guidance:	Salesforce Admin, Customize Application

To create pricing guidance, your org requires a package and license for CPQ CRM Analytics. The CPQ CRM Analytics license is available by default with CPQ+ licenses. The license includes up to five user licenses and the basic Analytics features for pricing guidance. If you have CPQ+ but haven’t enabled the CPQ CRM Analytics license and installed the CRM Analytics Plus package, contact your Salesforce sales rep.

Important: Analytics Integration users in CRM Analytics also require a CPQ license to access CPQ objects such as quote and quote line.

1. Enable Analytics.
   a) From Setup, in the Quick Find box, enter `Analytics`.
   b) Select **Getting Started**, and then select **Enable Analytics**.
2. Enable Data Sync and Connections, and Analytics Templates.
   a) From Setup, in the Quick Find box, enter `Analytics`, and then select **Settings**.
   b) Select **Enable Data Sync and Connections** and **Enable CRM Analytics Watchlist**.
3. Install the CPQ CRM Analytics (Analytics for Salesforce CPQ) or the CRM Analytics Plus package.
4. Assign the Analytics Template Administration permission set license to the admins who work with pricing guidance.
5. Create a Pricing Guidance app in the Analytics Studio.
   a) From Lightning, enter `Analytics Studio`, and then select the **Analytics Studio** app. In Salesforce Classic, from Home on the All tab, select the Analytics object.
   b) Select **Create**, and then select **App**.
   c) In Create a New App, select Create an app, select **Create from Template**, and then select **Pricing Guidance**.
   d) Name the app `Pricing_Guidance` and then click **Create**.

   Important: You must also turn on Enable Pricing Guidance in the CPQ package settings.
6. Share dashboards with your CRM Analytics users.
   a) Go to Analytics Studio and select **Apps**.
   b) In the Pricing Guidance app, select the Share icon next to the Create button.
   c) Enter the names of the users, groups, or roles that require access to the Create Pricing Guidance page. Specify the role of the user, group or role as Viewer, Editor, or Manager.
7. Add the Analytics URLs to your allowlist so that you can load Pricing Guidance dashboards.
   a) From Setup, in the Quick Find box, enter `Allowlist`, and then select **Allowlist**.
   b) From Setup, select **My Domain** and verify the settings under My Domain Settings.
   If Use enhanced domains is enabled, enter `https://<MyDomainName>—sbqqea.vf.force.com. Replace <MyDomainName> with the My Domain name of your org.`
   If Stabilize Visualforce, Experience Builder, Site.com Studio, and content file URLs are enabled, enter `https://<MyDomainName>—sbqqea.visualforce.com. Replace <MyDomainName> with the My Domain name of your org.`
   If Stabilize Visualforce, Experience Builder, Site.com Studio, and content file URLs aren't enabled, enter `https://<MyDomainName>—sbqqea.<instance>.visual.force.com. Replace <MyDomainName> with the My Domain name of your org and <instance> with the instance where your org belongs.`
8. Make sure that you enabled My Domain.
9. To show sales reps the suggested target discount before they open the Pricing Guidance page, add the Guidance field to the quote line's Line Editor field set.

   This field shows the Target discount for the pricing guidance tier that covers the quote line's quantity. Sales reps can use the Guidance field to quickly see the suggested Target discount before they open the Pricing Guidance page.

   For Salesforce Classic users, add the Create Pricing Guidance tab to your tab list. The Create Pricing Guidance tab is available in Classic and Lightning when you have a CPQ CRM Analytics license and package or CRM Analytics Plus license and package.
10. Save your changes.

Related concepts

Considerations for Pricing Guidance
Before you start setting up pricing guidance, look at important considerations. (Salesforce CPQ Managed Package)

Create and Apply Pricing Guidance with CRM Analytics
Create a pricing guidance record with suggested discounts based on historical product discount data. Assign it to a product or products so that sales reps can view pricing guidance when they add the products to their quotes. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later for users with a CRM Analytics Plus license

Before you create pricing guidance values for the first time, follow the steps in Enable Pricing Guidance in Salesforce CPQ and read Calculating Guidance Tiers for Pricing Guidance.

The Create Pricing Guidance page consists of two processes. You can create or edit and then save a view, which contains all of your guidance tiers and discount information. You can also create a pricing guidance record from one of your saved views and assign it to a product. Each time you edit a saved view, you can overwrite it or create a new view based on your changes. Editing a view in the Pricing Guidance page doesn't change any of the Pricing Guidance records created from that view. If you want to edit a pricing guidance record, check out Edit Pricing Guidance Records.

1. Open the Create Pricing Guidance page.

   To quickly access the Create Pricing Guidance page in Salesforce Classic, add it as a custom object tab.
2. Create or edit a view.
   a) Define filters for the product or products that you want pricing guidance to appear on. Einstein Analytics evaluates quote lines that match your filters and calculates their median discounts.
   b) In the Discount section, set your target, norm, and floor discounts as percentages relative to the median discount percentage.
   c) If you're editing a saved view, select the dropdown icon next to its name, click **Save View**, and choose whether to overwrite your existing view or create a new one. Otherwise, select **My Views**, and then select **Save View.**
   d) If you made a new view, give it a name, and then click **Create**.

      If you want this view to appear by default when users enter the Create Pricing Guidance page, select **Make my default view**.
3. Assign a view to a pricing guidance record.
   a) From the Pricing Guidance page, click **Next**.
   b) In the Select a View field, choose one of your pricing guidance views.
   c) Salesforce CPQ shows a summary of your suggested discounts and the filters you used. Give your pricing guidance record a name, enter a description that summarizes your recommendations for your sales reps, then click **Save Guidance**.
   d) From the Guidance Saved page, click **Assign the rule to a product**.
   e) Go to your pricing guidance record and click **Activate**.

You can also manually assign pricing guidance by going to a product and providing a value for its Pricing Guidance field. Multiple products can look up to the same pricing guidance.

Edit Pricing Guidance Records
Sometimes the pricing tier generation logic doesn't match what your pricing guidance needs. When you want to change the default suggested discount values or quantity bound ranges, edit the pricing guidance and pricing tier records. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '19 and later

All changes to a pricing guidance record must be made on the record itself, not the Create Pricing Guidance page. Changes made on a pricing guidance record don't flow back to the Create Pricing Guidance view that you used to create the record.

1. From the Pricing Guidance object page, select your pricing guidance record.
2. Edit the pricing guidance fields and tiers.

   Salesforce CPQ shows your changes when sales reps open the Pricing Guidance page in the quote line editor. If you changed a target discount that a sales rep previously accepted, Salesforce CPQ doesn't update the Additional Discount field with your new value. If the sales rep wants to apply the new target discount, they'll need to accept it again.

Create Pricing Guidance Manually
Users without CRM Analytics can create a pricing guidance record and define its discounts and tiers manually. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '19 and later

1. From the Pricing Guidance record page, click **New**, then define fields for the pricing guidance record.
   a) Give your pricing guidance a name.
   b) Provide a description and a summary. The description is a brief overview of the guidance that you and other admins can reference while managing Pricing Guidance records. Use the Summary field to provide a detailed explanation of the parameters that you evaluated to determine the discounts and boundaries of your pricing tiers.
   c) Provide an explanation for your sales reps. They see the explanation when they open this Pricing Guidance on their quote in the quote line editor.
   d) Set your pricing guidance as active. Inactive Pricing Guidance records don't appear for your sales reps in the quote line editor.
2. Create your Pricing Guidance Tiers.
   a) From the Pricing Guidance detail page, click **New Pricing Guidance Tier**.
   b) Give your pricing guidance a name.
   c) Give your tier a lower and upper bound.
   d) Give your tier target, norm, and floor discounts.
   e) Create more tiers if needed.
3. Assign your pricing guidance to a product's Pricing Guidance field. You can associate a pricing guidance record with more than one product.

Things to Know About Pricing Guidance
Check out guidelines, considerations and useful tips for working with pricing guidance. Review pricing guidance field definitions and permissions. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '19 and later

- Considerations for Pricing Guidance

Before you start setting up pricing guidance, look at important considerations. (Salesforce CPQ Managed Package)

- Guidelines for Pricing Guidance

As you work with pricing guidance, keep these important guidelines in mind. (Salesforce CPQ Managed Package)

- Pricing Guidance Fields

A pricing guidance record contains a description of the recommended discounts and other basic information, such as guidance tiers Each tier contains target, normal, and floor discount recommendations for quote lines that fall within the tier's quantity range. (Salesforce CPQ Managed Package)

- Pricing Guidance Tier Fields

Each pricing guidance record also contains tiers organized by quantity ranges of the target product. Each tier contains target, normal, and floor discount recommendations for quote lines that fall within the tier's quantity range. (Salesforce CPQ Managed Package)

- Salesforce CPQ Pricing Guidance Permissions

Remember to enable Salesforce CPQ profile permissions for users working with pricing guidance. (Salesforce CPQ Managed Package)

Considerations for Pricing Guidance

Before you start setting up pricing guidance, look at important considerations. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

- If a quote line has pricing guidance, you can still apply discounts through price rules and Salesforce CPQ plugins.
- Pricing guidance is unavailable for these products.
  - Bundle products and their children
  - Percent of total subscriptions and their covered assets
  - Products with discount schedules
  - Products with contract-based or renewal-based special pricing
  - Products that have a compound discount or option-based discount
  - Products with consumption schedules
  - Products with active Non-Discountable or Non-Partner Discountable fields
  - Quote lines with partner discounts or distributor discounts
  - Quote lines that move from an amended quote to an amendment quote

Related tasks

Enable Pricing Guidance in Salesforce CPQ

Before you can enable pricing guidance for users, you must configure certain Salesforce, Tableau CRM, and Salesforce CPQ settings. (Salesforce CPQ Managed Package)

Guidelines for Pricing Guidance

As you work with pricing guidance, keep these important guidelines in mind. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

General Guidelines

- Suggested discounts have no restrictions. You can set your target, norm, and floor discounts percentages as any positive or negative value away form the median discount, even values above 100% to any value, even values greater or less than 100%.
- The Create Pricing Guidance filters support only the predefined filters. Users can't add custom fields as filters.
- Disabling pricing doesn't remove values from the Pricing Guidance field on the quote and quote line, or additional discounts applied when sales reps clicked **Accept Recommendation**. Salesforce CPQ removes only the quote line's icon. Changing the quantity and doing a calculate won't clear or update the pricing guidance field in the quote line editor.
- Once you save a pricing guidance view, you can't modify it further in the Create Pricing Guidance page. You can edit it only by making changes on the pricing guidance record.
- By default, pricing guidance evaluates quantities of products that sales reps sold on previous quotes. Let's say their current quote line has a quantity of 1, and a previous quote that they sold contains a quote line for the same product with a quantity of 8. Salesforce CPQ uses a quantity of 9 when evaluating the guidance tier for their current quote line. You can turn off this feature by deselecting the Include Prior Purchases field on the pricing guidance record.

Sharing Views

- Pricing Guidance views must be shared manually. Go to Analytics Studio, navigate to the dashboard, and share the view with other users.

Renewals

- The pricing guidance icon doesn't appear on renewed quote lines until the first time the renewal quote is calculated. This way, the renewed quote line's pricing guidance can evaluate pricing guidance record or product updates made since the original quote.
- If a sales rep accepts pricing guidance and renews the quote line, the renewal quote line inherits the original quote line's Additional Discount.

Pricing Guidance Fields
A pricing guidance record contains a description of the recommended discounts and other basic information, such as guidance tiers Each tier contains target, normal, and floor discount recommendations for quote lines that fall within the tier's quantity range. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

Field Name	API Name	Data Type	Definition
Description	SBQQ__Description__c	Text Area (255)	Reference text that describes this pricing guidance, viewable on the pricing guidance detail page to admins only. Use the Explanation field for messages that appear to sales reps.

Field Name	API Name	Data Type	Definition
Active	SBQQ__IsActive__c	Checkbox	Option that enables pricing guidance for an associated product. Inactive pricing guidance won't appear in the quote line editor.
Unit	SBQQ__Unit__c	Picklist	The unit of discount for this pricing guidance. Salesforce CPQ Summer ’19 supports only the Percentage value.
Explanation	SBQQ__Explanation__c	Text Area (255)	Provide sales reps with an explanation of this pricing guidance and recommendations for discounts to provide. They can view this explanation with the pricing guidance in the quote line editor.
Type	SBQQ__Type__c	Picklist	In Salesforce CPQ Summer ’19, the Type field supports only the Range value. Range: The guidance discounts using only the pricing guidance tier that applies to the quote line quantity.
Include Prior Purchases	SBQQ__IncludePriorPurchases__c	Checkbox	When setting the pricing guidance tier for a quote line, include product quantities that were sold earlier

Pricing Guidance Tier Fields
Each pricing guidance record also contains tiers organized by quantity ranges of the target product. Each tier contains target, normal, and floor discount recommendations for quote lines that fall within the tier's quantity range. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

Field Label	API Name	Data Type	Description
Lower Bound	SBQQ__LowerBound__c	Number(12, 0)	The lowest quote line quantity that applies to this tier. This number must match the upper bound of the previous tier.
Upper Bound	SBQQ__UpperBound__c	Number(12, 0)	The highest quote line quantity that applies to this tier. This number must be one above the highest quantity that you want this tier to include.
Target Discount (%)	SBQQ__TargetDiscount__c	Percent(4, 10)	Ideal pricing based on past sales.
Norm Discount (%)	SBQQ__NormDiscount__c	Percent(4, 10)	Average pricing based on past sales. If a sales rep wants to use this price, they must discount the quote line manually. This discount may require approvals based on your org's approval settings.
Floor Discount (%)	SBQQ__FloorDiscount__c	Percent(4, 10)	Low-range and exception pricing based on past sales, applied manually.
Pricing Guidance	SBQQ__PricingGuidance__c	Master-Detail(Pricing Guidance)	The pricing guidance that contains this tier.

Salesforce CPQ Pricing Guidance Permissions
Remember to enable Salesforce CPQ profile permissions for users working with pricing guidance. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

Task	Create	Read	Edit	Delete	Other
Admins creating pricing guidance tiers	• Pricing Guidance • Pricing Guidance Tier • Guidance field on the Quote Line	• Pricing Guidance • Pricing Guidance Tier • Products • Guidance field on the Quote Line	• Pricing Guidance • Pricing Guidance Tier • Products • Guidance field on the Quote Line	• Pricing Guidance • Pricing Guidance Tier • Guidance field on the Quote Line	• Access to Pricing Guidance tab • Access to Pricing Guidance field on Products • Access to Guidance field on the Quote Line
Sales reps using pricing guidance tiers	None	• Pricing Guidance • Pricing Guidance Tier • Products • Guidance field on the Quote Line	None	None	• Optional: Access to Pricing Guidance tab • Access to Pricing Guidance field on Products • Access to Guidance field on the Quote Line

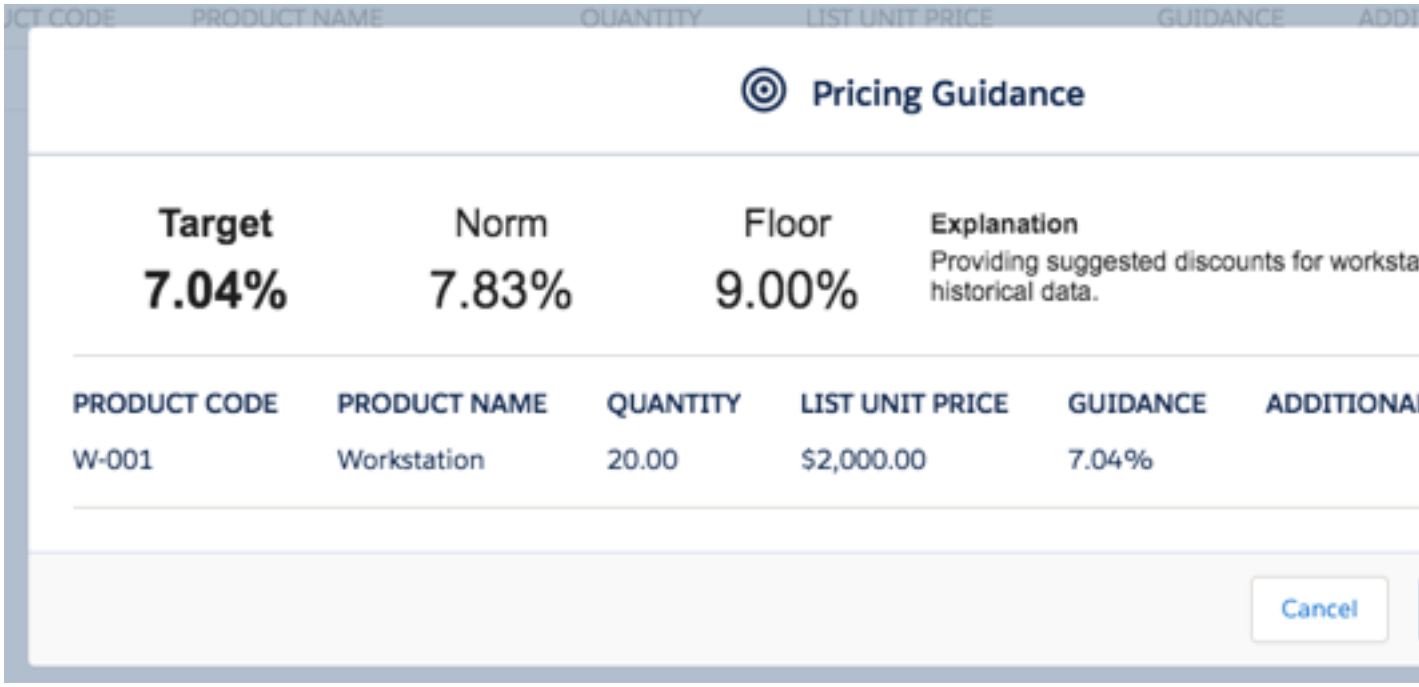
Price Your Quote Lines with Pricing Guidance
The next time you're closing a deal, check out pricing guidance to view target discounts based on historical sales information. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

If an admin enabled pricing guidance for a product in your quote, the guidance appears as the icon in quote lines for that product.

1. When you see the icon on one of your quote lines, click it to open pricing guidance. Salesforce CPQ shows the pricing guidance for your quote line. Review your suggested discounts.
   - The target discount represents an ideal discount percentage that supports customer purchase without discounting your quote line too heavily.
   - The norm discount represents an average discount for this product based on historical pricing trends.
   - The floor discount represents a high discount only for special circumstances, such as a final incentive to close a deal or to prevent the attrition of a long-time customer.

2. Apply a discount. To apply the target discount, click **Accept Recommendation**.
   - For target discounts, click **Accept Recommendation**.
   - For norm and floor discounts, enter that value manually in your quote line's Additional Discount field.



- Additional discounts may require approvals based on your org's approval settings.
- Admins often set up pricing guidance so that suggested discounts vary as the quote line's quantity changes. If you edit your quote line's quantity and reopen pricing guidance, you may see different suggested discounts. If you already accepted a discount and edit your quote line's quantity, your Additional Discount may also change.
- If a product has pricing guidance and a discount schedule, the quote line editor always uses pricing guidance and ignores the discount schedule, even if the guidance is inactive.

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. (Salesforce CPQ Managed Package)

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
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 that they can't exceed. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

To set up this feature, 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. If a quote line group's Optional field is selected, Salesforce CPQ doesn't apply the target customer amount to the group's pricing.

You can also apply target amounts at the group level. Navigate to your group and enter a value in its Target Customer Amount field in the group header.

Note:

- The target customer amount is a unit-based discount. Quote line items with large quantities don't always get an exact discount value. Salesforce CPQ looks for a line with a quantity of one and then allocates the difference. If no lines have a quantity of one, your amount can be off by one or two units of your smallest currency unit. 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, click **Calculate** or **Save** in the quote line editor to apply the discount.
- The 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 that's needed to reach the target customer amount.
- A target customer amount and an additional discount applied at the same time on the quote header isn't supported.
- Target Customer Amount doesn't calculate correctly when Percent of Total product included in the quote is marked as Non-Discountable.

Related information
Knowledge Article: Use Case: Applying Additional Discount Last in the Salesforce CPQ Pricing Sequence

Compound Discounts in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’16 and later

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))
```

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	$100.00	$100.00
2	$84.09	$168.18
5	$66.87	$334.35
10	$56.23	$562.30
25	$44.72	$1,118.00

Discount Categories in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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.

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.

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 in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

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

To learn more about events that trigger calculations, check out The Salesforce CPQ Quote Calculation Sequence.

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.

Note: Sales reps with read-only access to price rules and its fields can create price rules by cloning an existing record. To prevent them from creating or modifying price rules, remove the Clone with Related button from the page layout or remove the sales rep's user access to the ClonePriceRule custom page.

- 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. (Salesforce CPQ Managed Package)

- Price Conditions in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- Price Actions in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Price Rule Considerations

Review some important considerations when you create a price rule. (Salesforce CPQ Managed Package)

- Price Rules for Pricing Guidance

Salesforce CPQ Summer '19 added Quote Line Pricing Guidance as a Target Object value on price actions. After you select Quote Line Pricing Guidance, you can select Target (%), Norm (%), Floor (%), and Explanation as Target field values. Calculator-scoped price rules can target pricing guidance in the quote line editor. They're useful for adjusting guidance discounts and descriptions. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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	When the price condition evaluation scope targets the calculator, choose the action that causes Salesforce CPQ to evaluate the price rule. • On initialization—After a calculation is triggered, Salesforce CPQ evaluates the price rule during Step 4 of the Loading and Initialization process. • 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.
Product	**Legacy Calculator only:** Assigns a price rule to a specific product. When Salesforce CPQ evaluates a quote containing this product, it applies the price action to all the product's quote lines that meet the price rule's price conditions.

Price Conditions in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

- Create a Price Condition

Add a price condition to your price rule. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Price Condition Fields

Field	For price conditions that target an object to evaluate a field value, choose the field on the target object. The price condition evaluates only the field that appears on the target object, even if the same field appears on other objects. 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).
Object	For price conditions that target an object to evaluate a field value, choose the target object.
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
Add a price condition to your price rule. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

      If the Field picklist doesn't contain the field you want to evaluate, add the field's API name as a Field picklist value. You'll also need to update your controlling fields so that your new Field value appears for the proper object. For example, if you added *Color__c* to product options, make sure that it's dependent on the Object field's Product Option value.
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.

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 in Salesforce CPQ
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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Price actions usually apply discounts to a pricing field on a quote line.

- 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. (Salesforce CPQ Managed Package)

- Create Price Actions

Create a price action that performs an action on a Target Field when the price rule meets certain criteria. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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. **Note:** Formulas aren't supported when the target object is Product Option.
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 can't 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. Price actions can't target the quote's Group field.
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. (Salesforce CPQ Managed Package)

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).

      Important:

      - As of Salesforce CPQ Spring '20, we changed the way literal values representing percentages are evaluated in the Formula field of a price action to be consistent with the way price action formulas evaluate percentage values. This change also brings consistency with the way Salesforce formulas are evaluated in custom field definitions overall. To avoid any issues, update existing price action formula fields that contain percentage field values. Use decimals for values representing percentages, such as 1 for 100%, or 0.5 for 50%.
      - Before Salesforce CPQ Summer '19, when a price action formula evaluated a quote or quote line percentage field, it divided that field value by 100 within the formula logic. For example, a percent field value of 50% was evaluated as 0.005 rather than 0.5 within the formula. Fields that used the result of the price action formula had an incorrect value. Users could avoid this issue by multiplying quote or quote line percentage field values by 100 in their price action formulas. As of Salesforce CPQ Summer '19, price action formula fields don't divide quote or quote line percentage field values by 100. If you have price action formula fields where you multiplied percentage field values by 100 to avoid this error, you need to update them.

   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.

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '16 and later

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, when the Apply Immediately field in the product option is active.

Note: If the Apply Immediately field is disabled, Salesforce CPQ doesn't apply changes until the sales rep saves the bundle or navigates to a different bundle level. To give users the ability to run edit rules on demand, use the Apply Rules custom action. The Apply Rules custom action allows sales reps to choose when to run edit rules while changing a bundle.

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Evaluation Events

- If a price rule has a calculator evaluation event of On Initialization, Salesforce CPQ runs the rule before calculating the rule’s formula fields. If your On Initialization rule contains a formula field that requires a specific value, you can 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. • 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 or lookup queries. Salesforce CPQ evaluates all an evaluation event's conditions simultaneously. Actions then fire sequentially for rules whose conditions were met. An action from one rule in an evaluation event can't influence the conditions or satisfy the lookup query of another rule in the same evaluation event.
Other	• When Salesforce CPQ evaluates a price rule formula, it doesn't account for differences between the source record's currency and the quote's currency. For example, suppose a quote line references a USD product while the quote uses EUR. In this case, price rules targeting the quote line use the quote line's USD price without converting it to EUR. • When a price action without price conditions targets the Quote, the action evaluates the quote line or quote line group with the lowest Number__c value. We recommend using price conditions to ensure that your price action targets the correct record • Price actions can target ListPrice__c or Quantity__c only if those actions send values other than null. Salesforce CPQ supports values other than null for Quote Line Quantity__c. If Quote Line Quantity__c is null, Salesforce CPQ stops the calculation for that line. • 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.

- 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 don't have to revise your rules if you add requirements.
- Price rules targeting the Additional Discount (%) or Additional Discount (Amt) fields must have an action that sends a null value to the other Additional Discount field.

  Note: On renewal generation where Renewal Pricing Method is defined as Same, you can't manipulate these fields until the After Calculate step, because the values are calculated On Calculate.
- Salesforce CPQ doesn't execute price rules during Apex test class execution. The JavaScript Quote Calculator performs triggered calculations in an external web service requiring a callout, and Apex test classes can't make arbitrary callouts.
- A custom metadata object can be the target of a price rule lookup field. If multiple price rules target the same custom metadata object, all price rules must target the same field on the metadata object.
- When you're using price conditions, and a picklist field in the Field parameter then comparing against a filter value, the filter value must be surrounded by single quotes.

Related information

Knowledge Article: Troubleshoot Price Rule Issues

Price Rules for Pricing Guidance

Salesforce CPQ Summer '19 added Quote Line Pricing Guidance as a Target Object value on price actions. After you select Quote Line Pricing Guidance, you can select Target (%), Norm (%), Floor (%), and

Explanation as Target field values. Calculator-scoped price rules can target pricing guidance in the quote line editor. They're useful for adjusting guidance discounts and descriptions. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

- Guidelines for Pricing Guidance Price Rules

When you make price rules that target pricing guidance, review important guidelines. (Salesforce CPQ Managed Package)

- Create a Price Rule to Modify Pricing Guidance

Create a price rule with price actions that modify fields in your quote's instance of a pricing guidance record. (Salesforce CPQ Managed Package)

Guidelines for Pricing Guidance Price Rules

When you make price rules that target pricing guidance, review important guidelines. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ‘19 and later

- Price rules targeting pricing guidance require an Evaluation Scope of Calculator and Calculator Evaluation Event of After Calculate.
- Price actions that target Quote Line Pricing Guidance refer to the specific instance of pricing guidance within the quote line editor. Changes made through the price rule don't affect pricing guidance records.
- To make price rules that can also apply to quote line quantities that don't fall in a guidance tier, use NULLVALUE in a price action formula. For example, `NULLVALUE(Target__c,0)+20` takes an empty Target (%) value and changes it to 20%.
- To replace the value of a pricing guidance Description field completely, enter your new value in the price action's Value field. To add more text to existing Description text, use a formula field. For example, `(SBQQ__Explanation__c, "")+"Extra 20% discount for ABC Applications employees in California."`

Create a Price Rule to Modify Pricing Guidance

Create a price rule with price actions that modify fields in your quote's instance of a pricing guidance record. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer ’19 and later

In this example, your company sells security cameras and alarms. The security camera has pricing guidance with several discount tiers.

You want to add a price rule that provides an extra 10% discount on top of target discounts when selling to an ABC Applications customer in California. The price rule also updates the Pricing Guidance explanation so that sales reps know that the California discount has been applied.

1. Create a price rule with an evaluation scope of Calculator and a calculator evaluation event of After Calculate.
2. Create your price conditions.

First Price Condition

- Object: Quote
- Tested Formula: SBQQ__Account__r.Name
- Operator: Equals
- Filter Type: Value

- Filter Value: ABC Applications

Second Price Condition

Object: Quote
Tested Formula: SBQQ__BillingState__c
Operator: Contains
Filter Type: Value
Filter Value: CA

3. Create your price actions.

First Price Action

- Target Object: Quote Line Pricing Guidance
- Target Field: Target (%)
- Formula: `Target__c+10`

Second Price Action

- Target Object: Quote Line Pricing Guidance
- Target Field: Target (%)
- Formula:
```
NULLVALUE(SBQQ__Explanation__c,
"")+"Extra 20% discount for
ABC Applications employees in
California."
```

When a sales rep opens a quote that matches the price conditions, Salesforce CPQ adds an extra 10% discount to the Target (%) value. It also updates the pricing guidance description.

Refreshing Quote Prices

The Refresh Prices button lets sales reps pull the latest price book values into their quote, or into all of the quotes on their opportunity. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’15 and later

- Refresh Quote Prices

Refresh quote line prices with the newest list prices from your price books. 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 quote line prices based on active product rules, price rules, discounts, and markups. (Salesforce CPQ Managed Package)

- Add the Refresh Prices Button to Quotes and Opportunities

To give sales reps the ability to get the newest list prices from their price books, add a Refresh Price button to quote and opportunity page layouts. (Salesforce CPQ Managed Package)

Refresh Quote Prices

Refresh quote line prices with the newest list prices from your price books. 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 quote line prices based on active product rules, price rules, discounts, and markups. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’15 and later

If you don't see the Refresh Prices button on your quote or on your opportunity's Quotes related list, ask your Salesforce admin to update your page layouts.

1. To refresh the prices on one quote, go to the quote and click **Refresh Prices**.

2. To refresh the prices on multiple quotes for the same opportunity, go to the opportunity.
   a) Find the Quotes related list on the opportunity.
   b) Select the quotes that you want to refresh.
   c) Click **Refresh Prices**.

   If the refreshed quote is the opportunity's primary quote, the quote bases the price calculation on its own price book. If the quote isn't primary, it uses the opportunity's price book instead. By default, the list unit price inherits the price specified in the product's price book entry unless a special price type is defined.

Add the Refresh Prices Button to Quotes and Opportunities
To give sales reps the ability to get the newest list prices from their price books, add a Refresh Price button to quote and opportunity page layouts. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '15 and later

1. Add the Refresh Prices button to the Quote page layout.
   Sales reps can click this button to update list prices on their quote with the newest original price and list price from related price books. Salesforce CPQ then recalculates quote line prices based on active product rules, price rules, discounts, and markups.
2. Add the Refresh Prices button to the opportunity's Quotes related list.
   Sales reps can refresh prices on several of an opportunity's quotes at once by selecting each quote in the related list and then clicking **Refresh Prices**.

The Salesforce CPQ Quote Calculation Sequence

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '16 and later.

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 or deletes lines in the line editor
- Selects **Save** or **Quick Save** in the line editor
  - In Salesforce Classic, the package setting Disable Background Calculation Refresh affects the results of a save action in the quote line editor. If the setting is active, Salesforce CPQ doesn't update standard object pages following a background quote calculation triggered by a save. This setting is always disabled in Lightning Experience and Salesforce1.
- Edits a quote line using the **Edit** button

- Clicks **Calculate** on the quote detail page. The quote detail page's Calculate button is available in Salesforce CPQ Spring ’19 and later.
- Inserts or updates a quote line through Apex, a workflow rule, a Process Builder, a flow, or via a data load process.

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.
- After placing an order against a quote, do not modify any parts of the quote that affect cost. Do not modify products, dates and schedules, quantity, or price.
- When multicurrency is enabled, the currency value from a product record is converted via exchange rate and the quote line inherits the converted value. However, the Advanced Quote Calculator in Lightning Experience doesn’t support currency conversion, so this value isn’t mapped properly from quote line to the opportunity product. To get the correct currency value, create a formula field on the opportunity product instead of mapping the fields from the quote line.

Calculating Fields Field Set

Calculating Fields is a quote line field set. A field in this set triggers a quote calculation when its value changes. The following fields are part of Calculating Fields by default and still trigger calculations even if you remove them from the field set.

- Additional Discount (%)
- Distributor Discount
- End Date
- First Segment Term End Date
- Markup (%)
- Partner Discount
- Primary
- Start Date
- Subscription Term

You can also add other fields to Calculating Fields, and remove them if you no longer want their changes to trigger a calculation.

- Add Fields to Trigger Quote Recalculation

The quote's Calculating Fields field set contains a list of quote fields that trigger a quote calculation when their value changes, either manually or by an automated process. You can add other fields to expand the list of fields that trigger calculations. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Disable Real-Time Calculation for Salesforce CPQ Quotes

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. (Salesforce CPQ Managed Package)

- Enable Asynchronous Calculation for Quotes

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. (Salesforce CPQ Managed Package)

Add Fields to Trigger Quote Recalculation

The quote's Calculating Fields field set contains a list of quote fields that trigger a quote calculation when their value changes, either manually or by an automated process. You can add other fields to expand the list of fields that trigger calculations. (Salesforce CPQ Managed Package)

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. Move your desired fields from the field list into the field set. If needed, you can also remove fields.
4. Save your changes.

The following fields are part of Calculating Fields by default and still trigger calculations even if you remove them from the field set.

- Additional Discount
- Distributor Discount
- End Date
- First Segment Term End Date
- Markup (%)
- Partner Discount
- Primary
- Start Date
- Subscription Term

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.

Salesforce 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. (Salesforce CPQ Managed Package)

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 onBeforeCalculate() 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 onBeforePriceRules() 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 onAfterPriceRules() 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 onAfterCalculate() 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 limit ensures that Salesforce CPQ stays within the 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.
- Block price products populate List Price on the "Calculates fixed items" calculation stage.
- To avoid issues with JavaScript's floating point arithmetic, equality-based formulas on quotes and quotes lines must use ROUND() on Currency values.

Disable Real-Time Calculation for Salesforce CPQ Quotes
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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '18 and later.

When asynchronous calculations are enabled, all calculations outside the quote line editor are less likely to time out, but take longer to complete. Calculations made in the quote line editor aren't affected. Due to the potential for slower calculations, we recommend enabling asynchronous calculations only if you've already encountered calculation timeouts.

To enable asynchronous calculations in your org, contact customer support.

Enhance Quotes with Custom Scripts

Use JavaScript code to add extra functionality to the CPQ quote line editor. Custom scripts are called by the Quote Calculator Plugin. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’16 and later

Salesforce CPQ calculates quotes based on products, schedules, and configurations made in the quote line editor. Calling a custom script in the Quote Calculator Plugin is the only way to change how the quote calculator uses this data to compose the quote. For example, to add an extra discount to designated lines on the quote, use a custom script. Or, use a custom script to change field visibility. Find out more about supported methods and view sample scripts in the Quote Calculator Plugin section of the Salesforce CPQ Plugin Developer Guide.

Custom scripts can’t be used to create invalid calculation conditions, such as setting up consumption rate tiers that overlap.

Select the custom scripts object in the app picker to view, create, or edit your custom scripts. You can create multiple scripts, but the Quote Calculator Plugin can only call one script.

- Call a Custom Script in the Quote Calculator Plugin

Use custom JavaScript code in CPQ calling custom scripts from the Quote Calculator Plugin. (Salesforce CPQ Managed Package)

- Custom Scripts for Discounting Consumption Rates

Custom scripts can add extra functionality to the quote line editor. Review the sample script to learn how to use JavaScript to apply discounts to selected consumption rates on a consumption schedule. (Salesforce CPQ Managed Package)

- Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it’s important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

Related tasks

Call a Custom Script in the Quote Calculator Plugin
Use custom JavaScript code in CPQ calling custom scripts from the Quote Calculator Plugin. (Salesforce CPQ Managed Package)

Call a Custom Script in the Quote Calculator Plugin

Use custom JavaScript code in CPQ calling custom scripts from the Quote Calculator Plugin. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’16 and later

User Permissions Needed	
To create or modify custom scripts:	Customize Application

1. From Setup, enter `Installed Packages`, and then select **Installed Packages**.

2. Find the Salesforce CPQ package and click **Configure**.
3. Navigate to the Plugin tab.
4. **Note:** You can create multiple scripts, but plugins can only call one script.

   Enter the name of the custom script to be called in the Quote Calculator Plugin field.
5. Click **Save** when you're done.

Note: As of Salesforce CPQ Winter '19, the isFieldEditable and isFieldVisible methods can't be used to alter data.

Related concepts

Enhance Quotes with Custom Scripts
Use JavaScript code to add extra functionality to the CPQ quote line editor. Custom scripts are called by the Quote Calculator Plugin. (Salesforce CPQ Managed Package)

Custom Scripts for Discounting Consumption Rates
Custom scripts can add extra functionality to the quote line editor. Review the sample script to learn how to use JavaScript to apply discounts to selected consumption rates on a consumption schedule. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '19 and later

To create or modify custom scripts, users require the Customize Application permission.

Javascript Quote Calculator plugins don't support custom fields on consumption rates and consumption schedules.

When a user manually changes a field value that was set by a Quote Calculator plugin, the system prioritizes the value calculated by the plugin and overwrites the value that the user manually entered.

This custom script uses a custom quote field called UbpDiscount__c.

Name	UBP Discount
Quote Line Fields	UbpDiscount__c SBQQ__Price__c
Code	

```
export function
 onBeforeCalculate(quote, lines,
 conn) {
        if (lines) {
           lines.forEach((line) => {
            const ubpDiscount =
 line.record['SBQQ__UbpDiscount__c'];
            if(ubpDiscount) {
              if
 (line.consumptionSchedules) {

 line.consumptionSchedules.forEach((cs,
 index) => {
                          const rates
 = cs.getRates();
                          if (rates) {

 rates.forEach((rate, index) => {

       const originalPrice =
 rate.get('SBQQ__Price__c');
                                    //
 Provide 10% discount
```

```
  const newPrice = originalPrice*
 0.9;

    rate.set('SBQQ__Price__c',
 newPrice);
                                 });
                             }
                         });
                 }
             }
          });
        }
  return Promise.resolve();
}
```

Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it's important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

Field	API Name	Description
Code	SBQQ__Code__c	JavaScript code that is executed. Code must be complete and valid JavaScript.
Consumption Rate Fields	SBQQ__ConsumptionRateFields__c	The API names of consumption rate fields referenced in this script. Enter up to 10 fields, one on each line. Fields that aren't listed can't be used in the script. Available in Salesforce CPQ Spring '19 and later.
Consumption Schedule Fields	SBQQ__ConsumptionScheduleFields__c	The API names of consumption schedule fields referenced in this script. Enter up to 10 fields, one on each line. Fields that aren't listed can't be used in the script. Available in Salesforce CPQ Spring '19 and later.
Created By	CreatedBy	The username of the user who created the script
Last Modified By	LastModifiedBy	The username of the user who last edited the script
Owner	SBQQ__Owner__c	The username of the user who owns the script

Field	API Name	Description
Quote Fields	SBQQ__QuoteFields__c	The API names of fields on the quote object referenced by the script. Fields that aren't listed can't be used in the script. Enter one field per line, but don't enter fields you don't need. The more fields you enter, the slower the script runs.
Quote Line Fields	SBQQ__QuoteLineFields__c	The API names of fields on the quote object referenced by the script. Fields that aren't listed can't be used in the script. Enter one field per line, but don't enter fields you don't need. The more fields you enter, the slower the script runs.
Quote Line Group Fields	SBQQ__GroupFields__c	The API names of fields on the quote object referenced by this script. Fields that aren't listed can't be used in the script. Enter one field per line, but don't enter fields you don't need. The more fields you enter, the slower the script runs.
Script Name	Name	The name of the script

Related reference

Salesforce CPQ Quote Fields
Salesforce CPQ provides various custom-managed fields for CPQ quotes. (Salesforce CPQ Managed Package)

Salesforce CPQ Quote Line Fields
Quote lines store information about the products that a sales rep has quoted. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Salesforce CPQ Quote Line Group Fields
Salesforce CPQ provides various custom managed fields for CPQ quote line groups. Quote lines groups store information about how lines on a quote are organized into groups. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Consumption Rate Fields
Salesforce CPQ provides custom-managed fields for consumption rates. Consumption rates describe the billing rate for a tier in a consumption schedule. Page layout and field-level security settings determine whether fields are visible or editable. (Salesforce CPQ Managed Package)

Consumption Schedule Fields
Salesforce CPQ provides various custom managed and standard fields for consumption schedules. A consumption schedule organizes a set of consumption rates by which usage-based products are quoted

and billed. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Lookup Queries

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

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. Lookup queries evaluate tested objects only on product options selected in product configuration or on quote lines that exist within the quote line editor.
Tested Field	Define the quote field that your lookup query evaluates. **Note:** Tested Field supports non-null values only.
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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '17 and later

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.

Lookup Object	The API name of the object that stores your lookup data. Use *SBQQ__LookupData__c* or any custom object other than *SBQQ__Quote__c* or *SBQQ__QuoteLine__c*.
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.

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. Remember, all Add, Show & Add, and Enable & Add lookup data records must have a Required field with a value of Yes.

Table 52: Lookup Data Records

Name	**Category**	**Type**	**Product**
Lookup Data 1	null	Show	Gold Support
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

Name	Category	Type	Product
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
Tested Configuration Attribute	Support Level
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.

Related concepts

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Winter '16 and later

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.

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)

Related concepts

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Lookup Queries for Large Datasets

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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

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	To find one match out of 75,000 records, match two quote line text values to two dataset record values.
Actions	Update a percentage field and a number field on the quote line with the value you matched.

To improve query performance:

- To avoid using a lookup query, use a rollup field on your quote or quote line.
- When running multiple lookup queries on one object type in the same action use fewer lookup queries to reduce the number of records.
- Combine multiple product rules with similar lookup queries on the same object into one product rule.
- Limit when a product rule lookup query applies to the Load or Save actions when possible.
- Avoid using “not equal to” operator in lookup queries on object types with large datasets. Queries perform better when you search for what you’re looking for rather than what you’re not looking for.

Related concepts

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Salesforce CPQ Quote Fields

Salesforce CPQ provides various custom-managed fields for CPQ quotes. (Salesforce CPQ Managed Package)

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 specify an additional discount 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 specify an additional discount default to this value.
Average Customer Discount (%)	SBQQ__AverageCustomerDiscount__c	Formula (Percent)	Average customer discount (in percentage) for this quote.
Average Partner Discount (%)	SBQQ__AveragePartnerDiscount__c	Formula (Percent)	Average partner discount (in percentage) for this quote.

Field	API Name	Data Type	Definition
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	This field doesn't perform any features by default. We've provided it in case you want to use it with custom automation. By default, your quote line's billing frequency inherits its value from the product's billing frequency only.
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	Select By Subscription End Date to create a separate contract for each unique subscription end date containing only those subscriptions. Select Single Contract to create one contract containing all subscriptions regardless of their end dates. • By Subscription End Date • Single Contract
Customer Amount	SBQQ__CustomerAmount__c	Rollup Summary (SUM Quote Line)	This field is a rollup summary field.
Days Quote Open	SBQQ__DaysQuoteOpen__c	Formula (Number)	Number of days the quote has been open.

Field	API Name	Data Type	Definition
Default Template	SBQQ__DefaultTemplate__c	Lookup (Quote Template)	Template to use with this quote. Salesforce 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. Values are as follows. • Download • Ship
Distributor	SBQQ__Distributor__c	Lookup (Account)	Distributor for this quote. Default value copied from partner on the opportunity with the role of Distributor.
Distributor Discount	SBQQ__DistributorDiscount__c	Percent (3, 2)	Distributor discount applied to this quote unless it's overridden at the line item level.
Document Status	SBQQ__DocumentStatus__c	Picklist	Indicates the status of your document. Values are as follows. • Pending • Sent • Failed
Email Template ID	SBQQ__EmailTemplateId__c	Text (18)	ID of email template prepopulated 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. A Salesforce admin sets this field's value at the package level.
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.

Field	API Name	Data Type	Definition
Generate Contracted Price	SBQQ__GenerateContractedPrice__c	Picklist	If set to Yes, generates a contracted price based on all adjusted quote line items on the quote. Values are as follows. • Yes • No
Group Line Items	SBQQ__LineItemsGrouped__c	Checkbox	Select this option to use SolutionGroups™ or add your own groups on the Edit Lines page to categorize and subtotal quote line items.
Introduction	SBQQ__Introduction__c	Long Text Area (2,000)	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.
Last Calculated On	Quote__c.LastCalculatedOn	Date/Time	The date and time of the last successful calculation.
Last Saved On	Quote__c.LastSavedOn	Date/Time	The date and time the quote was last saved.
Line Item Count	SBQQ__LineItemCount__c	Rollup Summary (COUNT Quote Line)	Number of line items in this quote.
List Amount	SBQQ__ListAmount__c	Rollup 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 can override this value on the 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.

Field	API Name	Data Type	Definition
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	Rollup Summary (SUM Quote Line)	Total net amount of each non-optional line item in this quote. **Note:** Because Net Price includes the opportunity product's Sales Price, which then calculates the opportunity's Total Amount, discrepancies occur between the quote's Net Amount and the opportunity's Total Amount. The rollup summary for the quote's Net Amount pulls the sum of all quote lines' Net Total (16,2) value, which is rounded to 2 decimals, giving it the same rounded value. The opportunity's Total amount shows the precise value.
Notes	SBQQ__Notes__c	Long Text Area (2,000)	Notes printed on the generated PDF document.
Opportunity	SBQQ__Opportunity2__c	Lookup (Opportunity)	Opportunity associated with this quote.
Order By	SBQQ__OrderBy__c	Picklist	Split orders by shared field values.
Order By Quote Line Group	SBQQ__OrderByQuoteLineGroup__c	Checkbox	Automatically splits orders based on quote line group.
Original Quote	SBQQ__OriginalQuote__c	Lookup (Quote)	If this quote represents a change order, use this field to link back to the original quote.

Field	API Name	Data Type	Definition
Partner	SBQQ__Partner__c	Lookup (Account)	Primary partner on this deal (if any). This field's default value is copied from 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. Values are as follows. • 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.
Price Book 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 appears 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.

Field	API Name	Data Type	Definition
Quote Number	Name	Auto Number	System-generated number for referencing the quote record. This field can't be edited or overwritten.
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.
Quote Template ID	SBQQ__QuoteTemplateId__c	Text (18)	Stores a quote template ID, if one is specified for use in generating quote PDF documents. You can also populate the quote template ID using a workflow rule based on either a custom field for user input, or a standard quote field. When this field has a value, users can preview or generate the quote template.
Regular Amount	SBQQ__RegularAmount__c	Rollup 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.

Field	API Name	Data Type	Definition
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 field references 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. Values are as follows. • Draft • In Review • Approved • Denied • Presented • Accepted • Rejected
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 an additional discount on discountable line items.
Total Customer Discount Amount	SBQQ__TotalCustomerDiscountAmount__c	Formula (Currency)	Total amount of customer discount. This amount includes contracted, volume, compound rate, and additional discounts.

Field	API Name	Data Type	Definition
Type	SBQQ__Type__c	Picklist	Indicates the type of quote. Values are as follows. • Quote • Renewal • Amendment • Change Order
Uncalculated	SBQQ__Uncalculated__c	Formula (Checkbox)	Indicates whether the quote has been calculated. If the value is True (that is, if the field is selected), the Last Calculated On date isn't the same as or older than the Last Saved On date.
Watermark Shown	SBQQ__WatermarkShown__c	Checkbox	Select this checkbox to display a watermark in the Quote Document.

Related reference

Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it's important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

Salesforce CPQ Quote Line Fields

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

Available in: All Salesforce CPQ Editions

Important: Fields that appear in the quote line editor are defined by the Line Editor field set, which is defined on the Quote, Quote Line, and Quote Line Group objects. After a Salesforce upgrade, sometimes the Line Editor field set doesn't reflect new field restrictions. As a result, some fields in the quote line editor don't behave as expected. If fields don't behave as expected, ensure they're available for the Line Editor field set on the Quote, Quote Line, and Quote Line Group objects.

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 a discount extended on top of volume discount or negotiated prices.

Field	API Name	Data Type	Definition
Additional Discount (%)	SBQQ__Discount__c	Percent (9, 2)	Additional customer discount extended to this line item, expressed as 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's quantity can be refunded. Relevant only for amendments.
Batch Quantity	SBQQ__BatchQuantity__c	Number (10, 2)	If products are sold in batches, this field stores the quantity in each batch. Default value is copied from the product.
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Defines the billing frequency. Values: • 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 field's value overrides the automatic calculation of quantity multiplied by unit price.
Bundled	SBQQ__Bundled__c	Checkbox	The product on this line item is part of a bundle product on this quote. Bundled line items have a price of 0, and price and quantity can't be edited.

Field	API Name	Data Type	Definition
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.
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 populated only if the 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 populated only if the 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. Values: • Package • Components • Both
Component Uplifted By Package	SBQQ__ComponentUpliftedByPackage__c	Checkbox	Fixes uplift for this component to the parent bundle uplift. Uplift applies only to multi-segmented products.
Component Visibility	SBQQ__ComponentVisibility__c	Formula (Text)	Indicates 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	This field is no longer supported.

Field	API Name	Data Type	Definition
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.
Cost	SBQQ__Cost__c	Lookup (Cost)	Cost record for the line item.
Cost Editable	SBQQ__CostEditable__c	Checkbox	Specifies whether cost can be edited on the line item.
Customer Total	SBQQ__CustomerTotal__c	Formula (Currency)	Customer total price for the quote line item. This total 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 the line item. This price is the net unit price, excluding partner discounts.
Default Subscription Term	SBQQ__DefaultSubscriptionTerm__c	Number (5, 0)	Term length of the subscription, which applies only if the product is a subscription. It's 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 of the line item.
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup (Discount Schedule)	Specify discounts in terms of percentage or amount to be discounted from the product's price using quantity purchased or term. Set quantity or term ranges in tiers of different discount percentages. The discount is applied to the list price, and the resulting total is stored in the regular price.

Field	API Name	Data Type	Definition
Discount Schedule Type	SBQQ__DiscountScheduleType__c	Picklist	Discount schedule type. Copied from the Type field in the associated discount schedule. Must be a stored value because it's used in rollup formula fields. Values: • Range • Slab
Discount Tier	SBQQ__DiscountTier__c	Lookup (Discount Tier)	Discount tier used by the line item. This field is populated only if a product is volume discounted and the discount schedule is of type Range.
Distributor Discount	SBQQ__DistributorDiscount__c	Percent (3, 2)	This discount is applied to the partner price and reflected in the net price.
Dynamic Option ID	SBQQ__DynamicOptionId__c	Text (40)	Contains the feature ID and product ID to identify the feature and optional SKU associated with the line item.
Earliest Valid Amendment Start Date	SBQQ__EarliestValidAmendmentStartDate__c	Formula (Date)	The earliest amendment start date allowed, based on previously amended subscriptions.
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 or covered by the Slab discount schedule, or an existing subscription. For amendment quotes, this field is equal to (Quantity) - (Prior Quantity).

Field	API Name	Data Type	Definition
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 (applies only if product is a subscription).
Existing	SBQQ__Existing__c	Checkbox	Indicates that the customer already owns this product. This checkbox 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 line item belongs.
Generate Contracted Price	SBQQ__GenerateContractedPrice__c	Picklist	Generates a contracted price based on the adjusted quote line if flagged. Values: • Yes • No
Gross Profit	SBQQ__GrossProfit__c	Currency (14, 2)	Gross profit amount on this line item.
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 item is saved to an incomplete database. This flag can be set when price rules are evaluated. Test this field in validation rules to avoid firing the rules prematurely. Don't add this field to a page layout or otherwise update it.
List Total	SBQQ__ListTotal__c	Formula (Currency)	Quantity multiplied by list unit price.

Field	API Name	Data Type	Definition
List Unit Price	SBQQ__ListPrice__c	Currency (12, 2)	The list unit price inherits this product's price book entry by default unless a special price type is defined.
Markup	SBQQ__Markup__c	Formula (Currency)	Markup amount on this item. This value is calculated automatically by applying markup rate or absolute amount to the product cost.
Markup (%)	SBQQ__MarkupRate__c	Percent (6, 2)	Markup on the line item, expressed as a percentage.
Markup (Amount)	SBQQ__MarkupAmount__c	Currency (14, 2)	Markup amount for the line item.
Maximum List Unit Price	SBQQ__MaximumPrice__c	Currency (14, 2)	Maximum unit price for the 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.
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. This field doesn’t override the discounts specified in the Discount Schedule field.
Non Partner Discountable	SBQQ__NonPartnerDiscountable__c	Checkbox	Select this checkbox to make this line item non-discountable for partners.

Field	API Name	Data Type	Definition
Number	SBQQ__Number__c	Number (5, 0)	Number indicating this line item's position within its group or quote; its value must be unique within the group or quote.
Optional	SBQQ__Optional__c	Checkbox	Marks this line item as optional; optional line items don't contribute to quote totals and aren’t transferred to the opportunity.
Option Discount (%)	SBQQ__OptionDiscount__c	Percent (3,2)	If this line item 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 the nesting level of this option (applies only to line items generated from options).
Option Type	SBQQ__OptionType__c	Picklist	Indicates the option type, which is copied from the related product option; determines how quantity is calculated. Types: • 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 weren’tapplied.
Package	SBQQ__Bundle__c	Checkbox	Indicates whether this line item represents a bundle, that is, whether it includes other line items in this quote.
Package Cost	SBQQ__PackageCost__c	Formula (Currency)	Total cost of 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 (32,000)	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 company sells through a channel/VARI, a partner discount can be given on a quote or individual product line item. Partner discounts are applied after all automatic and discretionary discounts. The partner discount is accounted for in the partner price.

Field	API Name	Data Type	Definition
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 accounted for in the partner price.
Partner Unit Price	SBQQ__PartnerPrice__c	Currency (12, 2)	Partner unit price. Price after partner discount but before distributor discount.
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. Values: • Quote • Group
Percent of Total Target Price	SBQQ__SubscriptionTargetPrice__c	Currency (12, 2)	Percentage of the subscription target product price for calculating maintenance.

Field	API Name	Data Type	Definition
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 uplift is calculated 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 uplift is calculated for this segment.
Price Dimension	SBQQ__Dimension__c	Lookup (Price Dimension)	Dimension within an MDQ product. Each segment can be priced independently. Each product can contain several price dimensions. Yearly price dimensions are treated as subscriptions.
Price Editable	SBQQ__PriceEditable__c	Checkbox	Flag indicating whether the price is editable for this line item.
Pricebook Entry ID	SBQQ__PricebookEntryID__c	Id	When you add a product to a quote and save, the resulting quote line inherits its price book entry ID from the product's price book entry ID. When you order the quote, your order products inherit their price book entry IDs from their quote lines.
Pricing Method	SBQQ__PricingMethod__c	Picklist	Indicates how the price for this line item is calculated. List subtracts the discount from the list price. Cost adds markup to the cost. • List • Cost • Block • Custom

Field	API Name	Data Type	Definition
Pricing Method Editable	SBQQ__PricingMethodEditable__c	Checkbox	Specifies whether the pricing method can be edited on this line item.
Prior Quantity	SBQQ__PriorQuantity__c	Number (10, 2)	Sum of quantities from prior purchases. **Note:** For internal use only. Do not edit this field.
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 item.
Product Family	SBQQ__ProductFamily__c	Formula (Text)	A category you can use to help you organize this line item in Salesforce (whether it's a new or existing product family). Use this field during product selection to filter to the correct product or product SKU.
Product Name	SBQQ__ProductName__c	Formula (Text)	Name of the product referenced by this line item
Product Option	SBQQ__ProductOption__c	Lookup (Product Option)	Product option that generated this line item (if any).
Prorated List Price	SBQQ__ProratedListPrice__c	Currency (16, 2)	Prorated list unit price.
Prorated Unit Price	SBQQ__ProratedPrice__c	Currency (12, 2)	Prorated price of the product quoted by this line item. This price differs from the special price only if the product is a subscription and the line item is prorated.
Prorate Multiplier	SBQQ__ProrateMultiplier__c	Number (4, 4)	Calculated ratio used to compute prorated price.
Quantity	SBQQ__Quantity__c	Number (10, 2)	Quantity 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 is multiplied by quantity.
Regular Unit Price	SBQQ__RegularPrice__c	Currency (12, 2)	Unit price before additional discount.

Field	API Name	Data Type	Definition
Renewal	SBQQ__Renewal__c	Checkbox	Indicates that this line item represents a renewed product. This field is set to true only for non-subscription products for quote type Renewal. Under normal circumstances, this field isn't modified via the 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 item renews.
Required By	SBQQ__RequiredBy__c	Lookup (Quote Line)	Links this line item to another line item in the same quote whose product requires this line item's product.
Segment Index	SBQQ__SegmentIndex__c	Number (2, 0)	For multi-segmented products, the index representing this quote line item's position in the segment table.
Segment Key	SBQQ__SegmentKey__c	Text (30)	For multi-segmented products, a shared key used to group multi-dimensional quote line items.
Segment Label	SBQQ__SegmentLabel__c	Text (25)	For multi-segmented products, the column header label (for example, "Year 1") associated with this line item. Salesforce CPQ generates the segment label with double spaces between the segment and number.
Source	SBQQ__Source__c	Lookup (Quote Line)	Source of the cloned quote line item.

Field	API Name	Data Type	Definition
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 the special price type is Contract, your special price uses the value of the current contracted price record that is 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 the special price type is Custom, admins can provide their own value in the special price field. Salesforce CPQ uses the special price in calculating the quote line item price. However, the quote line item still maintains a value for the list unit price. If the list price is zero, the special price doesn't affect the calculation. Amendment quote

Field	API Name	Data Type	Definition
Special Price Description	SBQQ__SpecialPriceDescription__c	Text (80)	Name of the discount tier or contracted price applied to achieve the special price for this line item.
Special Price Type	SBQQ__SpecialPriceType__c	Picklist	Stores the type of special price offered on this line item. A null value indicates that there's no special pricing. Under normal circumstances, this field isn't modified via the UI.
Start Date	SBQQ__StartDate__c	Date	Date the service represented by this line item begins (applies only if the product is a subscription).
Subscribed Asset IDs	SBQQ__SubscribedAssetIds__c	Long Text Area (19,000)	Comma-separated list of asset IDs covered by the subscription line. Only applicable to renewal quotes. Don't 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 isn't a subscription. Values: • Fixed Price • Percent of Total
Subscription Term	SBQQ__SubscriptionTerm__c	Number (5, 0)	Term for the subscription product in the line item. If the product isn't a subscription, this value has no effect.

Field	API Name	Data Type	Definition
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's value is null. For a new quote line item, the value is conditionally mapped from the default subscription type. The conditional picklist values are as follows: • Default subscription type = One-Time and available subscription type = One-Time • Default subscription type = Renewable and available subscription type = Renewable • Default subscription type = Renewable/ Evergreen and available subscription type = Renewable or Evergreen • Default subscription type = Evergreen and available subscription type = Evergreen
Taxable	SBQQ__Taxable__c	Checkbox	Indicates whether products in records related to this account are taxable. By default, selecting this field doesn't perform actions in Salesforce CPQ. For example, selecting this field doesn't prevent the product from being added to quotes and orders for non-taxable accounts. However, Avalara for Salesforce CPQ evaluates the Taxable field when performing tax calculations.

Field	API Name	Data Type	Definition
Term Discount	SBQQ__TermDiscount__c	Currency (12, 2)	Discount calculated by applying the subscription term against the term discount schedule.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup (Discount Schedule)	Schedule for discounts based on subscription term. This field is useful when you want to show a breakdown of payments in separate groups for different terms, yet you want to apply the discount 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)	This field is deprecated.
Upgraded Asset	SBQQ__UpgradedAsset__c	Lookup (Asset)	The asset that this quote line is upgrading. When the quote is contracted, this asset's Usage End Date field is populated to indicate it's been retired.
Upgraded Quantity	SBQQ__UpgradedQuantity__c	Number (10, 2)	Portion of this line item's prior quantity upgraded to another product.

Field	API Name	Data Type	Definition
Upgraded Subscription	SBQQ__UpgradedSubscription__c	Lookup (Subscription)	The subscription that this quote line is upgrading. When the quote is contracted, this subscription's Terminated Date field is populated.
Uplift	SBQQ__Uplift__c	Percent (7, 2)	Uplift is applied as a percentage against the previous year's price. The resulting price is entered in the Regular Price field on top of special or contracted prices. Uplifts compound year after year. Uplift can't be applied to the first year of a subscription.
Uplift (Amount)	SBQQ__UpliftAmount__c	Currency (10, 2)	Uplift (Amount) is measured as a currency amount. This field is system calculated, because uplift can only be applied to MDQ segments in percentages.
Volume Discount	SBQQ__VolumeDiscount__c	Percent (12, 2)	Discount schedules let you 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 the subscription term.

Related reference

Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it’s important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

Salesforce CPQ Subscription Fields

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 their field values from their subscription product quote line items or order products. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Account	SBQQ__Account__c	Lookup (Account)	Account that owns the subscription. This relationship is used for volume discount calculations.
Additional Discount (%)	SBQQ__Discount__c	Percent (9, 2)	Additional customer discount for this subscription expressed as a percentage.
Additional Discount (Amount)	SBQQ__AdditionalDiscountAmount__c	Currency (12, 2)	Additional customer discount for this subscription expressed as an absolute amount.
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Defines the billing frequency. Values are as follows. • Invoice Plan • Monthly • Quarterly • Semiannual • Annual • Usage
Billing Type	SBQQ__BillingType__c	Picklist	• Advance • Arrears
Bundled	SBQQ__Bundled__c	Checkbox	The subscription is included in a bundle. Bundled line items have a price of 0, and price and quantity can’t be edited.

Field	API Name	Data Type	Definition
Charge Type	SBQQ__ChargeType__c	Picklist	Values are as follows: • One-Time • Recurring • Usage
Component Discounted By Package	SBQQ__ComponentDiscountedByPackage__c	Checkbox	Fixes additional discount for this component to the parent bundle discount.
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. Values are as follows. • Package • Components • Package and Components • Entire Hierarchy
Contract	SBQQ__Contract__c	Lookup (Contract)	Contract that governs this subscription.
Contract #	SBQQ__ContractNumber__c	Formula (Text)	Number of the associated contract.
Credit Product ID	SBQQ__CreditProductId__c	Formula (Text)	ID of upgrade credit product for this subscription.
Customer Price	SBQQ__CustomerPrice__c	Currency (12, 2)	Customer unit price for the product quoted by this line item. This price is the net price, excluding any partner discounts.
Dimension Type	SBQQ__DimensionType__c	Formula (Text)	Type set on the price dimension.

Field	API Name	Data Type	Definition
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup (Discount Schedule)	Specify discounts in terms of percentage or amount to be discounted from the product's price using quantity purchased or term. Set quantity or term ranges in tiers of different discount percentages. The discount is applied to the list price, and the resulting total is stored in the regular price.
Discount Schedule Type	SBQQ__DiscountScheduleType__c	Picklist	Discount schedule type. Copied from the Type field in the associated discount schedule. Must be a stored value because it's used in rollup formula fields. Values are as follows. • Range • Slab
Distributor Discount	SBQQ__DistributorDiscount__c	Percent (3, 2)	This discount is applied to the partner price and reflected in the net price.
Dynamic Option ID	SBQQ__DynamicOptionId__c	Text (40)	Contains the feature ID and product ID to identify the feature and optional SKU associated with this line.
End Date	SBQQ__EndDate__c	Formula (Date)	The last date this contract is valid.
Has Consumption Schedules	SBQQ__HasConsumptionSchedule__c	Checkbox	Indicates whether this subscription has at least one consumption schedule.
List Price	SBQQ__ListPrice__c	Currency (12, 2)	List price of this subscription product.
Markup (%)	SBQQ__MarkupRate__c	Percent (6, 2)	Markup on this subscription, if expressed as a percentage.

Field	API Name	Data Type	Definition
Markup (Amount)	SBQQ__MarkupAmount__c	Currency (12, 2)	Markup on this subscription, if expressed as an amount.
Net Price	SBQQ__NetPrice__c	Currency (12, 2)	Net price of this subscription.
Number	SBQQ__Number__c	Number (5, 0)	Number indicating the related quote line's position within its group or quote. This value must be unique within the group or quote.
Option Discount (%)	SBQQ__OptionDiscount__c	Percent (3, 2)	If this subscription 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 (applies only to lines generated from options).
Option Type	SBQQ__OptionType__c	Picklist	Indicates the option type, which is copied from the related product option; determines how quantity is calculated. Types are as follows. • Component • Accessory • Related Product
Order Product	SBQQ__OrderProduct__c	Lookup (Order Product)	The order product from which this subscription was generated. Populated only when the subscription is contracted from an order.
Original Quantity	SBQQ__BundledQuantity__c	Number (10, 2)	For items with calculated quantities, this field holds the original (user-entered) quantity.
Original Quote Line	SBQQ__OriginalQuoteLine__c	Lookup (Quote Line)	Original quote line of the subscription.

Field	API Name	Data Type	Definition
Original Unit Cost	SBQQ__OriginalUnitCost__c	Currency (12, 2)	Cost of one unit of product quoted on this line item if cost schedules weren't applied.
Package	SBQQ__Bundle__c	Checkbox	Indicates whether this line item represents a bundle, that is, it includes line items for product options on the quote.
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 (32,000)	Dynamic product description generated from the components inside this bundle.
Parent Product	SBQQ__RequiredBy__c	Lookup (Product)	Parent product of this subscription.
Partner Discount	SBQQ__PartnerDiscount__c	Percent (3, 2)	If your company sells through a channel or VARI, a partner discount can be given on a quote or individual product line item. Partner discounts are applied after all automatic and discretionary discounts. The partner discount is taken into account in the partner price.
Price Dimension	SBQQ__Dimension__c	Lookup (Price Dimension)	Price dimension associated with this subscription.

Field	API Name	Data Type	Definition
Pricing Method	SBQQ__PricingMethod__c	Picklist	Indicates how the price for the related line item is calculated. "List" = discount is subtracted from list price. "Cost" = markup is added to cost. Values are as follows. • List • Cost • Percent Of Total • Block • Custom
Product	SBQQ__Product__c	Lookup (Product)	Product used to sell the subscription.
Product ID	SBQQ__ProductId__c	Formula (Text)	Convenience field to support integration with Service Cloud.
Product Name	SBQQ__ProductName__c	Formula (Text)	Name of the product referenced by this subscription.
Product Option	SBQQ__ProductOption__c	Lookup (Product Option)	Product option that generated this subscription (if any).
Product Subscription Type	SBQQ__ProductSubscriptionType__c	Picklist	By default, this field is mapped from the product. For any legacy quote line, this field is null.
Prorate Multiplier	SBQQ__ProrateMultiplier__c	Number (4, 4)	Calculated ratio used to compute prorated price.
Quantity	SBQQ__Quantity__c	Number (10, 2)	Purchased quantity of this subscription.
Quote Line	SBQQ__QuoteLine__c	Lookup (Quote Line)	Quote line that generated the subscription.
Regular Price	SBQQ__RegularPrice__c	Currency (12, 2)	Regular price of this subscription.

Field	API Name	Data Type	Definition
Renewal Price	SBQQ__RenewalPrice__c	Currency (12, 2)	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. If your account uses Uplift renewal pricing, the uplift is applied directly to the Renewal Price field.
Renewal Product ID	SBQQ__RenewalProductId__c	Formula (Text)	Product ID of the renewal subscription.
Renewal Product Option ID	SBQQ__RenewalProductOptionId__c	Formula (Text)	ID of the renewal product option defined on the product option.
Renewal Product Option Product ID	SBQQ__RenewalProductOptionProductId__c	Formula (Text)	ID of the optional SKU defined on the renewal product option.
Renewal Product Option Sub Pricing	SBQQ__RenewalProductOptionSubscriptionPricing__c	Formula (Text)	Subscription pricing defined on the optional SKU of the renewal product option.
Renewal Quantity	SBQQ__RenewalQuantity__c	Number (10, 2)	Quantity of the subscription product to be renewed.
Renewal Uplift (%)	SBQQ__RenewalUpliftRate__c	Percent (8, 3)	Rate of renewal price increases.
Renewed Date	SBQQ__RenewedDate__c	Date	Date when this subscription was renewed. If blank, it hasn't been renewed.
Required By ID	SBQQ__RequiredById__c	Text (18)	The ID of the configured SKU that requires the optional SKU.
Revised Subscription	SBQQ__RevisedSubscription__c	Lookup (Subscription)	Lookup to the revised subscription.
Root ID	SBQQ__RootId__c	Text (18) (External ID)	The ID of the subscription or asset at the root of the bundle that contains this subscription.

Field	API Name	Data Type	Definition
Segment End Date	SBQQ__SegmentEndDate__c	Date	For multi-segmented products, the end date from the original segment's associated quote line.
Segment Index	SBQQ__SegmentIndex__c	Number (2, 0)	For multi-segmented products, represents the related quote line's position in the segment table.
Segment Key	SBQQ__SegmentKey__c	Text (30)	For multi-segmented products, a shared key used to group multi-dimensional quote line items.
Segment Label	SBQQ__SegmentLabel__c	Text (25)	For multi-segmented products, a column header label (for example, "Year 1") associated with the quote line.
Segment Quantity	SBQQ__SegmentQuantity__c	Number (10, 2)	For multi-segmented products, the quantity corresponding to the segment's original quote line.
Segment Start Date	SBQQ__SegmentStartDate__c	Date	For multi-segmented products, the start date from the original segment's quote line.
Segment Uplift	SBQQ__SegmentUplift__c	Percent (7, 2)	For multi-segmented products, the uplift percentage from the original segment's quote line item.
Segment Uplift (Amount)	SBQQ__SegmentUpliftAmount__c	Currency (10, 2)	For multi-segmented products, the uplift amount from the original segment's quote line.
Special Price	SBQQ__SpecialPrice__c	Currency (12, 2)	Special price for this subscription.
Start Date	SBQQ__StartDate__c	Formula (Date)	The first effective date of this subscription.

Field	API Name	Data Type	Definition
Subscription End Date	SBQQ__SubscriptionEndDate__c	Date	On the Subscription record, this field is populated with the quote line's end date if it doesn't match the contract. If the date matches the contract, this field is blank and looks up the contract for this date information.
Subscription Start Date	SBQQ__SubscriptionStartDate__c	Date	This field is populated only when the quote line's start date and the contract's start date are the same. When the quote line's start date and the contract's start date are different, this field is blank.
Subscription Type	SBQQ__SubscriptionType__c	Picklist	By default, this field is mapped from the product. For any legacy quote line item, the value is null. For a new quote line item, the value is conditionally mapped from the default subscription type. The conditional picklist values are as follows. • Default subscription type = One-Time and available subscription type = One-Time • Default subscription type = Renewable and available subscription type = Renewable • Default subscription type = Renewable or Evergreen and available subscription type = Renewable or Evergreen • Default subscription type = Evergreen and available subscription type = Evergreen

Field	API Name	Data Type	Definition
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup (Discount Schedule)	Schedule for discounts based on subscription term.
Terminated Date	SBQQ__TerminatedDate__c	Date	Date the subscription was terminated. Populated automatically when covered asset is upgraded.
Unit Cost	SBQQ__UnitCost__c	Currency (12, 2)	Unit cost of the subscription.

Related concepts

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. (Salesforce CPQ Managed Package)

Subscription Terms
A product's subscription term is the default amount of time that a subscription lasts. The CPQ package setting Subscription Term Unit controls whether the term is in months or days, and defaults to months. (Salesforce CPQ Managed Package)

Amending MDQ Products
Amend a contract containing multidimensional quoting (MDQ) products. This process is useful if you want to change a multiple-year contract partway through its term. (Salesforce CPQ Managed Package)

Related information

Knowledge Article: Legacy data upload with Renewals and Amendments in Salesforce CPQ

Salesforce CPQ Quote Line Group Fields

Salesforce CPQ provides various custom managed fields for CPQ quote line groups. Quote lines groups store information about how lines on a quote are organized into groups. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Account	SBQQ__Account__c	Lookup(Account)	The account referenced by this quote line group
Additional Disc. %	SBQQ__AdditionalDiscountRate__c	Percent(3, 2)	Additional customer discount extended to this line item expressed in form of a percentage

Field	API Name	Data Type	Definition
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Defines the billing frequency - One-Time - Monthly - Quarterly - Semiannual - Annual - Usage
Created By	CreatedById	Lookup(User)	The user who created this quote line group
Customer Total	SBQQ__CustomerTotal__c	Formula (Currency)	Customer total price for this quote line item. This is the Net Total excluding any partner discounts.
Description	SBQQ__Description__c	Rich Text Area(32000)	Description for this line item
End Date	SBQQ__EndDate__c	Date	Date the service represented by this line item ends (only applies if product is a subscription)
Favorite	SBQQ__Favorite__c	Lookup(Favorite)	Favorite to which this Quote Line belongs
Group Name	Name	Text(80)	Group to which this line belongs
Last Modified By	LastModifiedById	Lookup(User)	The user who edited this quote line group more recently
List Total	SBQQ__ListTotal__c	Currency(12,2)	Total for this group's line items before any discounts are applied
Markup (%)	SBQQ__MarkupRate__c	Percent(6, 2)	Markup on this line item expressed as a percentage
Net Total	SBQQ__NetTotal__c	Currency(12,2)	Net total price for this quote line item
Number	SBQQ__Number__c	Number(5, 0)	Number indicating this line's position within its group or quote

Field	API Name	Data Type	Definition
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.
Quote	SBQQ__Quote__c	Master-Detail(Quote)	Quote to which this line item belongs
Quote Process	SBQQ__QuoteProcess__c	Lookup(Quote Process)	Quote process used with this group. Overrides the quote level field.
Separate Contract	SBQQ__SeparateContract__c	Checkbox	If selected, a separate contract is generated for subscriptions in this group
Solution Group	SBQQ__SolutionGroup__c	Lookup(Solution Group)	Solution group from which this quote group was generated (if any)
Source	SBQQ__Source__c	Lookup(Quote Line Group)	Source of cloned quote line group
Start Date	SBQQ__StartDate__c	Date	Date the service represented by this line item will begin (only applies if the product is a subscription)
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
Target Customer Amount	SBQQ__TargetCustomerAmount__c	Number(15,0)	Lets sales reps define a new value for the quote line group subtotal. Salesforce CPQ applies an equal Additional Discount value to the group's discountable quote lines so that the group's subtotal matches the target customer amount. Approval requirements still apply to quote lines discounted this way.

Related reference

Custom Script Fields

When using the Quote Calculator Plugin to call a CPQ custom script, it’s important to understand what values to enter in fields. (Salesforce CPQ Managed Package)

Send Your Salesforce 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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

- Building Your Salesforce CPQ Documents with Quote Templates

Create preset layouts for your quote documents. You can divide your layouts into sections. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Conga Quote Generation for Salesforce CPQ

Conga Quote Generation for Salesforce CPQ allows customers to customize and export quotes and quote documents. (Salesforce CPQ Managed Package)

- OmniStudio Document Generation for Salesforce CPQ

The OmniStudio Document Generation license is available with Salesforce CPQ+. Install the OmniStudio Document Generation managed package to generate complex quotes quickly, accurately, and consistently. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Quote Template Permissions in Salesforce CPQ

Depending on your settings and your company’s internal processes, it can be necessary to customize quote template permissions for your users. (Salesforce CPQ Managed Package)

Building Your Salesforce CPQ Documents with Quote Templates

Create preset layouts for your quote documents. You can divide your layouts into sections. (Salesforce CPQ Managed Package)

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.

Note: Salesforce CPQ doesn't support quote templates without template sections.

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.

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

- Salesforce CPQ Template Content

Create template content to store specific data or text to insert into your quote sections. (Salesforce CPQ Managed Package)

- Create Template Sections

Use sections to position and style template content for your quote document. (Salesforce CPQ Managed Package)

- Template Line Columns

Organize your quote template with columns that represent quote line fields. (Salesforce CPQ Managed Package)

- Line Item Print Options

Quote templates contain many options for customizing the layout of line items in your documents. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Salesforce CPQ Document Fonts

Salesforce CPQ supports various fonts on quote documents. (Salesforce CPQ Managed Package)

Salesforce CPQ Template Content

Create template content to store specific data or text to insert into your quote sections. (Salesforce CPQ Managed Package)

Available in: All CPQ Editions

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.

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	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.
Custom	Display a Visualforce page in the Custom Source field within this section of your quote template. To reference your custom Visualforce page in the Custom Source field, enter `/apex/c__MyVFPageName`, replacing `MyVFPageName` with the name of your Visualforce page. The Visualforce page and its components must be compatible with XSL-FO to work with Salesforce CPQ document output.
Quote Terms: Template Bottom	Use Salesforce CPQ's standard bottom content for the quote template, including notes, dates, and final signature information.
Quote Terms: Template Top	Use Salesforce CPQ's standard top content for the quote template, including logo, street address, and ship to or bill to details.

To insert an image in the Markup field (a Rich Text field for the Template Top, Template Bottom, and HTML layouts), upload the field to the Documents folder, and then add it as a web address. Directly uploading the image to this field isn't supported.

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.

- Supported HTML Tags for Template Content

Salesforce CPQ supports several HTML tags and HTML tag attributes in template content markup. (Salesforce CPQ Managed Package)

- Merge Fields

Your template content can store fields that show field values from different objects. These merge fields are automatically updated in your content when the referenced field is updated on the other object. This

process is useful if you want template content to reflect changes made elsewhere in your org. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Show Images from Quote Templates in Quotes Documents

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. (Salesforce CPQ Managed Package)

Supported HTML Tags for Template Content
Salesforce CPQ supports several HTML tags and HTML tag attributes in template content markup. (Salesforce CPQ Managed Package)

Supported HTML Tags	html br div p em li ol strike strong b i u ul a img span sub sup
Supported HTML Tag Attributes	style href src alt

Merge Fields
Your template content can store fields that show field values from different objects. These merge fields are automatically updated in your content when the referenced field is updated on the other object. This process is useful if you want template content to reflect changes made elsewhere in your org. (Salesforce CPQ Managed Package)

Available in: All CPQ Editions

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 always matches

the sales rep on any of the quotes you choose. If the sales rep changes during the quoting process, the documents for a given quote are up to date.

Merge fields take the format of *{!recordname.fieldname}* in your template content. Replace *fieldname* with your field's API name and *recordname* with the name of the object containing your field. If you're using a Salesforce CPQ field, enter *SBQQ__* at the beginning of your field name. If you're using a custom field, including fields from a managed package such as Salesforce CPQ, include *__c* at the end of your field name.

When a merge field references a picklist field, Salesforce CPQ uses either the field's Label or API Name based on the Enable Multi-Language Translations package setting. If the setting is active, Salesforce CPQ uses the picklist value's Label. Otherwise, it uses the picklist value's API Name.

Tip: If your merge field includes a lookup field, Salesforce CPQ shows the ID of the referenced record when the merge field appears in your quote document. To show the referenced record's name instead, create a formula field that returns the record's name. You can then reference that formula field in your merge field instead.

Salesforce CPQ template content supports merge fields that reference fields from the following objects.

Object	Merge Field Appearance	Supported Fields
This merge field references all fields related to the Salesforce CPQ quote template object.	*!template.*	Standard fields, CPQ managed package fields, custom fields
This merge field references all fields related to the Salesforce CPQ quote object.	*!quote.*	Standard fields, CPQ managed package fields, custom fields
This merge field references all fields related to the Primary Contact on the Salesforce CPQ quote object.	*!primaryContact.*	Supported standard fields
This merge field references all fields related to the Sales Rep on the Salesforce CPQ quote object.	*!salesRep.*	Supported standard fields

You can also use *!companyLogo* on its own to show the image referenced in your quote template's Logo field.

Note: If you use a rich text field as a merge field and apply both color and formatting such as bold, italic, or underlining, the template doesn't apply color.

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.

Merge Field	Description
{!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 field 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 doesn't need the "SBQQ__" prefix.
{!quote.Type_of_Transaction__c}	In this case, the admin made a custom Type of Transaction field. This merge field references the Type of Transaction field on the quote object.

- Supported Merge Fields for Primary Contacts and Sales Reps

Salesforce CPQ supports only certain Primary Contact and Sales Rep fields as merge fields within template content. Review these fields to ensure that your merge fields appear correctly. (Salesforce CPQ Managed Package)

Supported Merge Fields for Primary Contacts and Sales Reps

Salesforce CPQ supports only certain Primary Contact and Sales Rep fields as merge fields within template content. Review these fields to ensure that your merge fields appear correctly. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Primary Contact	Sales Rep
• Email • Fax • FirstName • LastName • MailingCity • MailingCountry • MailingPostalCode • MailingState • MailingStreet • MobilePhone • Name • OtherCity • OtherCountry • OtherPostalCode • OtherState • OtherStreet • Title	• City • Country • Email • Extension • Fax • FirstName • LastName • MobilePhone • Name • Phone • PostalCode • State • Street • Title

Salesforce 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. (Salesforce CPQ Managed Package)

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.

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. Main Services 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Guidelines for Changing Quote Terms
Change the content of a quote term on a specific quote. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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
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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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.

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 from Quote Templates in Quotes Documents

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’15 and later

Note:

- 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.
- Salesforce CPQ quote templates don’t currently support hyperlinked images.

1. Start by adding a rich text field on your quote.
   a) In the object management settings for quotes, go to Fields, and then click **New**.
   b) Set the data type to Text Area (Rich), and then add a field label.
   c) Save your changes.
   d) Add the rich text field to your quote page layout.
2. Next, upload an image to your quote.
   a) To show the rich text editor, select your rich text field.
   b) Click 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 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

Use sections to position and style template content for your quote document. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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 shows 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. To control where page breaks occur in your section, choose values for the page break fields.

   Important: If Keep Together is set to Always, the section runs off the bottom of the page where it starts, past the margin, and doesn't continue on the next page. Data past the edge of the page doesn't appear anywhere in the document. To avoid this issue, set Keep Together to Auto, and if you want the template section to start on next page, use Page Break = Before and after as needed.
9. 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 Show 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. (Salesforce CPQ Managed Package)

Conditionally Show 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. (Salesforce CPQ Managed Package)

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 text field with a value of True.
- A formula field that evaluates to True
- A picklist field with a value of 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.

   By default, Conditional Print contains values for Group Line Items and Primary, but you can add other quote fields.

Template Line Columns

Organize your quote template with columns that represent quote line fields. (Salesforce CPQ Managed Package)

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 a 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.

Alignment	Choose whether the column values are aligned left, center, or right.
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.
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.
Roll-Up	If the quote template's Roll Up Field value matches this line column's Field Name value, and quote lines have the same value for that field, Salesforce CPQ combines the quote lines into one line on the quote document.
Section	Specify a template section here if you want this column to appear only in that section. Otherwise, this column appears in all sections.
Separate Line	To print the field on its own line, select the checkbox. Use this setting for long text fields such as Product Description. To generate quote documents properly, deselect Separate Line for at least one line column in any given line item section.
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 aren't 100.
Dynamic Number Scale	Set the decimal places for numbers in the column based on the record with the greatest precision. For example, if the record with the greatest precision has 4 decimal places, all the numbers in the column are set to display 4 decimal places. You can then adjust the appearance of your line columns with the Style Information and Column Option fields.

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. (Salesforce CPQ Managed Package)

Conditionally Display Quote Line Columns

Hide columns in your quote line sections based on the values of a quote field. (Salesforce CPQ Managed Package)

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 rightmost line column by default. When you select Discard Width When Hidden, 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

Quote templates contain many options for customizing the layout of line items in your documents. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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

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. (Salesforce CPQ Managed Package)

- Print or Hide Totals in Line Item Sections

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. (Salesforce CPQ Managed Package)

- Group Line Items in Quote Templates

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. (Salesforce CPQ Managed Package)

Filter Line Items by Template Section

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. (Salesforce CPQ Managed Package)

Available in: Salesforce Winter ’15 and later

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring ’16 and later

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
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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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
Set your quote template to show a company logo. Company logos help your quote documents look professional and organized. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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**.

Salesforce CPQ Document Fonts
Salesforce CPQ supports various fonts on quote documents. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Available Fonts	Courier
	Dosis
	Droid Sans
	Droid Serif
	Helvetica
	Merriweather
	Montserrat (Doesn't fully support all of the numeric entity references in Unicode tables)
	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)
	Open Sans
	PT Sans

PT Serif

Roboto

Roboto Light

Times New Roman

Titillium Web

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.

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

- Styling Your Salesforce CPQ Quote Documents

After you define the components of your quote document, customize its layout. (Salesforce CPQ Managed Package)

- Generate and Send a Salesforce CPQ Quote Document

Create a quote document when you're ready to send a quote to a customer. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Translate Salesforce 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. (Salesforce CPQ Managed Package)

Styling Your Salesforce CPQ Quote Documents

After you define the components of your quote document, customize its layout. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '14 and later

- Flexible Page Numbers in Salesforce 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Add PDFs to Your Quote Document

Add PDFs that appear between your template sections. The PDF is static, which means that Salesforce CPQ doesn't change its position when creating your quote document, unlike 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Remove Salesforce 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. (Salesforce CPQ Managed Package)

- Show Discount Schedules on Salesforce 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. (Salesforce CPQ Managed Package)

Flexible Page Numbers in Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '17 and later

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 PDFs to Your Quote Document
Add PDFs that appear between your template sections. The PDF is static, which means that Salesforce CPQ doesn't change its position when creating your quote document, unlike 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

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 that 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 doesn't support including publicly accessible documents if they're already in a customer's Salesforce org.

- Customers don't see page numbering on PDFs that you've attached to your quote document, although they can see numbers on standard pages.
- If you add an extra document to a quote document that contains HTML content with a hyperlink, the hyperlink appears as a URL instead on the generated document.

- Embedded links in quote PDFs where Included Content is added aren't clickable in previewed or generated quote documents.
- Documents generated or previewed as Microsoft Word files don't show attached PDF content.

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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

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
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 Managed Package)

Available in: Salesforce CPQ Winter '15 and later

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 Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '17 and later

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.

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 Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '16 and later

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 Salesforce CPQ Quote Document

Create a quote document when you're ready to send a quote to a customer. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '16 and later

Note: Salesforce CPQ document generation is compatible with multi-factor authentication using the Multi-Factor Authentication for User Interface Logins permission. Salesforce CPQ document generation is *incompatible* with the multi-factor authentication session security level required at login profile setting at high assurance. See Enable MFA for Specific Users.

1. Go to a quote record and click **Generate Document**.
2. Choose an output format. See Let Users Change Output Formats.

   Note: Microsoft Word doesn't support page breaks from CPQ quote documents.
3. 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.
4. Choose any other documents you want to add.
5. 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. In Salesforce Classic, clicking **Save & Email** opens a new browser tab that remains open after sending the email. In Salesforce Lightning, the new browser tab closes after sending the email.

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. You can Save or Save & Email your file, then open it and print it from your device if needed. As of Salesforce CPQ Spring '19, you can also download or print your preview document directly from the Salesforce CPQ preview page.
Cancel	Cancel document creation and return to your quote record.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Spring '15 and later

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. (Salesforce CPQ Managed Package)

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 Salesforce 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. (Salesforce CPQ Managed Package)

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 variables into.
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.

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

The variable name on the Translations page must be the field’s API name without the `__c`. In this example, you would use `Quotation`.

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.
- Picklist values aren’t translated when the picklist field is used in the Group Field of the quote template, even if the document language and user language are changed.

Conga Quote Generation for Salesforce CPQ

Conga Quote Generation for Salesforce CPQ allows customers to customize and export quotes and quote documents. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’19

To get started with Conga Quote Generation for Salesforce CPQ, check out the Conga product documentation.

Warning: Direct all questions and feedback regarding Conga Invoice Generation (CIG) for Salesforce CPQ and Conga Quote Generation (CQG) for Salesforce CPQ to Salesforce CPQ & CPQ Support. For more information, check out Logging a Case for Conga Quote Generation or Conga Invoice Generation.

OmniStudio Document Generation for Salesforce CPQ

The OmniStudio Document Generation license is available with Salesforce CPQ+. Install the OmniStudio Document Generation managed package to generate complex quotes quickly, accurately, and consistently. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Winter ’24

OmniStudio Document Generation merges content from text-based files, such as Microsoft Word and PowerPoint, with data from any standard or custom object to produce custom .docx, .pptx, and .pdf files. Use templates to define the structure, content, and format of your generated documents. Use data tokens, conditional logic, tabulation, and imported JSON data to create the complex quotes that you need.

Install the OmniStudio managed package and complete the post-installation setup.

Related concepts

OmniStudio and OmniStudio Document Generation with Salesforce CPQ+
With OmniStudio Document Generation, create complex documents such as quotes quickly, accurately, and consistently. With OmniStudio FlexCards, DataRaptor, and other OmniStudio features, create guided interactions and other rich user experiences without code. (Salesforce CPQ Managed Package)

Related information

OmniStudio Document Generation

Post Install Steps for OmniStudio Document Generation

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Template Information

Default

Select whether this quote template is the default selection when quotes are generated.

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 quote document's margins, in inches.

Page Height

The page height is in inches. 11.0 is the standard value.

Page Width

The page width in inches. 8.50 is the standard value.

Header and 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 header for documents generated from this template.

Terms & Conditions

Enter the 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 can appear after 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

Customer Discount Field

Choose a field that computes a customer discount to display on the quote document. Use the default value, Total Discount (Amt), or add a custom field to the picklist. If you add a custom field, it appears on the quote document only when the template has a Group Field value.

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 doesn't show product options.

Hide Group Subtotals

Your quote document doesn't show group subtotals.

Hide Totals

Your quote document doesn'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 the 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

Provide a field. Salesforce CPQ combines the line items into one line on the quote template when both of the following conditions apply.

- Quote lines have the same value for this field
- The line column for this field has an active Roll Up field

The new line has the quantity of all the rolled-up lines.

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 sharing values from a different field.

Note: Custom total fields on the quote template must be non-null currency fields.

Quote Template Permissions in Salesforce CPQ

Depending on your settings and your company's internal processes, it can be necessary to customize quote template permissions for your users. (Salesforce CPQ Managed Package)

Quote Templates

User Type	Read	Create	Edit	Delete	Notes
Quote Templates (Admin)	• Quote Templates • Template Content • Template Sections	None	None	None	None
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

Advanced Approvals for Salesforce CPQ (Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Important: Revenue Cloud has an approval process feature that shares the same name, Advanced Approvals. If you are a Revenue Cloud customer, See Manage Approval Processes in Revenue Cloud.

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 isn't 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.

- Advanced Approvals Release Notes

Advanced Approvals release notes provide overviews of new and changed features in new editions of the Advanced Approvals package. (Salesforce CPQ Managed Package)

- Advanced Approvals Patch Notes

Advanced Approvals patch notes contain high-level reviews of bug fixes included in each generally available patch for an Advanced Approvals package. We update patch notes after a new patch becomes generally available for a package. (Salesforce CPQ Managed Package)

- Setting Up Advanced Approvals for Salesforce CPQ (Managed Package)

Advanced Approvals requires several objects, buttons, and settings so that it can work with Salesforce CPQ. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Reassign an Approval with Advanced Approvals

Keep the approval process moving by reassigning an approval to a different approver. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Approval Rules

Create approval rules to control who receives an approval request or rejection notice and the email templates that deliver these messages. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Smart Approvals

Smart approvals let you streamline the approval resubmission process for your sales reps. When you enable smart approvals on an approval condition, Advanced Approvals compares the condition's tested field value during resubmission with the tested value of the previous submission. If the values are the same, the approvers for that rule aren't asked to approve it again during resubmission. (Salesforce CPQ Managed Package)

- Managing Advanced Approval Permissions for Salesforce CPQ (Managed Package)

Admins and sales reps require different types of permissions based on the actions they want to perform in Advanced Approvals. (Salesforce CPQ Managed Package)

- Advanced Approvals Package Settings

Advanced Approvals package settings define Advanced Approvals features and standards across your Salesforce org. (Salesforce CPQ Managed Package)

- Approval Fields for Salesforce CPQ Advanced Approvals

The Approval object contains fields for Salesforce CPQ Advanced Approvals. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Related information

Trailhead: Advanced Approvals for Sales Reps and Approval Managers

Advanced Approvals Release Notes

Advanced Approvals release notes provide overviews of new and changed features in new editions of the Advanced Approvals package. (Salesforce CPQ Managed Package)

- *Advanced Approvals Release Notes 3.0–5.0*
- *Advanced Approvals Release Notes Spring '20 and Later*

Advanced Approvals Patch Notes

Advanced Approvals patch notes contain high-level reviews of bug fixes included in each generally available patch for an Advanced Approvals package. We update patch notes after a new patch becomes generally available for a package. (Salesforce CPQ Managed Package)

- *Advanced Approvals Patch Notes 2.24-5.0*
- *Advanced Approvals Patch Notes Spring '20 and Later*

Setting Up Advanced Approvals for Salesforce CPQ (Managed Package)

Advanced Approvals requires several objects, buttons, and settings so that it can work with Salesforce CPQ. (Salesforce CPQ Managed Package)

Important: Revenue Cloud has an approval process feature that shares the same name, Advanced Approvals. If you are a Revenue Cloud customer, See Manage Approval Processes in Revenue Cloud.

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

- Install or Upgrade Advanced Approvals

Install or upgrade Advanced Approvals from your package installation link. (Salesforce CPQ Managed Package)

- Enable an Object for Advanced Approvals

Advanced approvals are enabled for opportunities by default. However, most sales reps also use advanced approvals on quotes or other objects. Configure an object to work with Advanced Approvals. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Set Up Page Layouts for Advanced Approvals

Add important buttons, fields, and field values to objects that interact with Advanced Approvals. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Troubleshooting Advanced Approval Email Issues

If users experience issues with Advanced Approvals email, review our guidelines and troubleshooting tips. (Salesforce CPQ Managed Package)

Install or Upgrade Advanced Approvals

Install or upgrade Advanced Approvals from your package installation link. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. From your installation link, click **Continue**.
2. Choose the security level to grant users upon installation, and then click **Install** (for new installations) or **Upgrade**.

   Your security level varies based on the types of permissions you want to grant to your users. For an overview of basic Salesforce permissions granted with each level, read the Custom Installation section of Install a Package. For more information on profile permissions required for Advanced Approvals features, read Managing Advanced Approval Permissions for Salesforce CPQ (Managed Package). If you choose **Install for Specific Profiles**, you must also set the Standard User profile to **Full Access**.
3. Assign permission set licenses to your users.

As of Winter '21, Advanced Approvals manages user licensing with permission set licenses instead of managed package licenses. Fields and settings related to managed package licenses in Advanced Approvals were deprecated. On the Installed Packages page, the Allowed Licenses and Expiration Date fields refer to managed packages. As a result of the deprecation, they now show "Unlimited" and "Does not Expire" respectively for Salesforce CPQ.

Enable an Object for Advanced Approvals

Advanced approvals are enabled for opportunities by default. However, most sales reps also use advanced approvals on quotes or other objects. Configure an object to work with Advanced Approvals. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Before you begin, make sure that you have Read access to all the fields on the Approval object. If you have a licensed custom object as a lookup field on the Approval object, enable Read access on the licensed custom object by using a permission set license.

This example shows how to enable approvals for the Quote object. You can enable approvals on any Salesforce CPQ object if the object has a field with the API name Name. If you're enabling advanced approvals on the Case object, use the CaseNumber field.

To enable approvals on other Salesforce CPQ objects, follow these steps but replace instances of `Quote` with the name of the object.

1. Create a field on the Approval object with these values.
   Make the field visible, but not on the page layout.
   a. Data Type: Lookup
   b. Field Name: Quote
   c. Related to: Quote
2. Create a picklist field on the Quote object with these values.
   a. Name: Approval Status
   b. API Name: ApprovalStatus__c
   c. Values:
      - Pending
      - Approved
      - Rejected
      - Recalled
3. Create a date field on the Quote object.
   This field stores the submitted date for the approval.
   a. Name: Submitted Date
   b. 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.
   a. Name: Submitted User
   b. API Name: SubmittedUser__c
5. If you're enabling advanced approvals on quotes, make sure that 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 this code.

   Important: The Salesforce CPQ package comes with a QuoteExtController for the SBQQ namespace. However, for this step, you're creating a different QuoteExtController class. Because it's a custom class, it doesn't have a namespace and can run at the same time as SBQQ__QuoteExtController.

```
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 with the title QuoteExtControllerTests as a test class for the class that you made. In the class body of QuoteExtControllerTests, add this 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

In this example, we create buttons for the CPQ Quote object. However, you can create buttons for an object that you'd like. Replace `Quote` with the object label and `Quote__c` with the object's API name.

Note: If you use an object that has separate versions but the same name in both Salesforce CPQ and Salesforce, such as Quote__c and Quote, make sure that all your references refer to the correct version.

If you're creating buttons in a Lightning Community, use a global action of the Type: Custom Visualforce that refers to the Preview Approvals Visualforce page and then add the action to the Quote's Lightning Actions. When a user clicks the Preview Approval button, the Preview Approvals page for the quote opens.

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 Visualforce page that sales reps use when submitting a record for approval. Use the following values.
      - Label: SubmitQuote
      - Name: SubmitQuote
      - Visualforce Markup:

```
<apex:page standardController="SBQQ__Quote__c"
 extensions="QuoteExtController" action="{!onSubmit}">
<apex:pageMessages  />
</apex:page>
```

   d) Create a Visualforce page that sales reps use when recalling quotes. Use the following values.
      - Label: RecallQuote
      - Name: RecallQuote
      - 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 `Objects`, then select **Objects**. Select the Quote object for the Salesforce CPQ package.
   b) From the Buttons, Links, and Actions related list, click **New Button or Link**.
   c) Create these buttons. Each button has a Display Type field of Detail Page Button and a height of 600.

Submit for Approval	• Button Label: Submit for Approval • Button Name: Submit_for_Approval • Behavior: Display in existing window with sidebar • Content Source: Visualforce Page • Visualforce Page: Choose the SubmitQuote page you made in Step 1c.
Recall Approval	• Button Label: Recall Approval • Button Name: Recall_Approval • Behavior: Display in existing window with sidebar

- Content Source: Visualforce Page
- Visualforce Page: Choose the RecallQuote page you made in Step 1d.

Preview Approval

Note: To create a Preview Approval button in a Lightning Community, use a global action of the Type: Custom Visualforce that refers to the Preview Approvals Visualforce page. Add the action to the quote's Lightning Actions. When a user clicks the Preview Approval button, the Preview Approvals page for the quote opens.

- Button Label: Preview Approval
- Button Name: Preview_Approval
- Behavior: Display in an existing window with a sidebar.
- Button or Link URL: `/apex/sbaa__PreviewApprovals?Id={!SBQQ__Quote__c.Id}`
- Link Encoding: Unicode (UTF-8)

Related information

How Page Layout Elements Display in Lightning Experience

Set Up Page Layouts for Advanced Approvals

Add important buttons, fields, and field values to objects that interact with Advanced Approvals. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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 a unique name, such as `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 you enter the same domains that you provided in your email service record.
   f) Click **Save**.
5. Connect the email service to Advanced Approvals.
   a) From the Email Service: Approval Services page, go to your new address and copy the value in the Email Address field.
   b) From Setup, enter `Installed Packages`, and then select **Installed Packages**.
   c) Find the Advanced Approvals package and click **Configure**.
   d) Paste the email address into the Inbound Approval Email (Long) field, then save your changes.

Related concepts

Troubleshooting Advanced Approval Email Issues
If users experience issues with Advanced Approvals email, review our guidelines and troubleshooting tips. (Salesforce CPQ Managed Package)

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Outbound Emails

- Starting Summer '24 release, if the email address of a user involved in an approval isn't verified, approval request emails aren't sent. For example, involved users can be requesters, approvers, automation users, context users, and so on. To ensure emails are delivered, verify their email addresses. See Verify Email Addresses to Meet the Email Verification Requirement.

- Verify that the Access Level setting is set to All Emails. Find the setting in Setup, in Email Administration, under Deliverability.
- Verify that email services are set up correctly. See Set Up Email Service for Advanced Approvals.
- To capture errors that occur, use Route Error Emails to This Email Address in the email services.
- Verify that the email address is correct on the user record for the specific approver.
- Verify that the approval rule has a valid request template.
- Verify that each approval user has a unique email address. Copy the email address of the user experiencing issues, and use global search to verify that only one user or approver has the specific email address.

  If you're getting the error message "Unable to determine user," see Error 'Unable to Determine User' in Advanced Approvals.
- View email logs to verify that emails are being sent. If an email was sent, review the email platform you're using.
  - Determine whether the IP address is restricted.
  - Check with your company resources to identify any security settings that restrict incoming emails.
  - Check the Spam folder.
- If the approver has a group ID, and a specific user isn't getting an email, set up an approver with that user and verify that the email is being sent. If the user is still not getting the email, verify that the email was sent from Salesforce.
- When choosing a context user for the email service, make sure the user has the permissions and licenses required to access all referenced objects and fields in your Visualforce email template.
- The final approver or rejector of a request does not receive an email notification from the approval rule's approved template or rejected template.

Inbound Emails

- Verify that the Access Level setting is set to All Emails. Find the setting in Setup, in Email Administration, under Deliverability.
- Verify that email services are set up correctly. See Set Up Email Service for Advanced Approvals.
- Verify that the email address in the email services matches the package setting in Inbound Approval Email (Long).
- Verify that the email is an accepted email address based on the email service setting.
- Verify that the context user has the Modify All Data permission.
- Determine whether email templates are set up for the approval rule.
- Determine whether the email template has a reference to the ID in the approval. See Set Up Email Service for Advanced Approvals.
- Determine whether the reply to the email address is the same as the email address you set up.
- If you're getting the error message "Unable to determine user," see Error 'Unable to Determine User' in Advanced Approvals.

Related tasks

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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 an Approval with Advanced Approvals

Keep the approval process moving by reassigning an approval to a different approver. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Users can take action on an approval if they meet at least one of three requirements. When you reassign approvals, make sure that the recipient approver has at least one of these requirements.

- The user has an active Modify All Data permission on their profile.
- The approval has been assigned to the user's approval group.
- The user has been populated in the approval's Assigned To field.

1. From an approval record with a Requested status, click **Reassign**.
   Advanced Approvals shows the Reassign page.
2. In Reassign To, provide the user record for the new user who approves the requested record.
3. Click **Reassign**.

   The approval record changes its Assigned To field to the new approver.

   Note: You can also reassign approvals in bulk via the Replace button on an Approval record.

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. (Salesforce CPQ Managed Package)

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.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ‘16 and later with Advanced Approvals 3.1 and later

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.

- 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. (Salesforce CPQ Managed Package)

- Delegate Approvers

Choose a user to receive another user’s approval requests over a predefined time period. Delegated approvers are helpful when the original approver can’t respond to approvals, such as during a vacation. Only users can be delegated approvers; a group can’t be a delegated approver. (Salesforce CPQ Managed Package)

- Approver Fields

Depending on the page layout and field-level security settings, not all approver fields are visible or editable. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

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.

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’re 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.

Important: Dynamic approvals require a single approver record and therefore don't support delegated approvers.

Related information

Knowledge Article: Subordinates Not Recognized as Approval Recipients in Groups for Approval Rule Assignment

Delegate Approvers

Choose a user to receive another user's approval requests over a predefined time period. Delegated approvers are helpful when the original approver can't respond to approvals, such as during a vacation. Only users can be delegated approvers; a group can't be a delegated approver. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. In the Delegated Approver field, enter the user record of the user you want to delegate.
2. Specify the delegation period in the Delegate Start and Delegate End fields.

   These fields are required. The period begins at 12:00 AM on the delegate start date and ends at 11:59 PM on the delegate end date.

If the delegated approver hasn't worked with Advanced Approvals before, make sure you configure Salesforce to give the approver the required permissions to view approvals. After you set up the delegated approver, make sure that they have the Approve and Reject buttons on the approval objects page layout and that they have permissions to approve or reject an approval.

Related concepts

Managing Advanced Approval Permissions for Salesforce CPQ (Managed Package)
Admins and sales reps require different types of permissions based on the actions they want to perform in Advanced Approvals. (Salesforce CPQ Managed Package)

Related reference

Salesforce 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. (Salesforce CPQ Managed Package)

Approver Fields

Depending on the page layout and field-level security settings, not all approver fields are visible or editable. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

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. You can't use a group as a delegated approver. **Note:** Advanced Approvals doesn't pass approvals from one delegated approver to another delegated approver. For example, let's say John is out of the office and assigns Mary as his delegated approver. Mary is also out of the office and assigned Ted as

	her delegated approver. When John receives an approval request, Advanced Approvals sends the request to Mary.
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. If multiple users have the same email, Advanced Approvals sends an "unable to determine user" email when one of the users attempts to approve via email.

Approval Rules

Create approval rules to control who receives an approval request or rejection notice and the email templates that deliver these messages. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

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 doesn't contain a warranty.

Advanced Approvals Rule Evaluation and Smart Approvals: Comma-Delimited Comparison

A keyword-like comparison of a string field occurs in Rule Evaluation and Smart Approvals. All string-based fields use it (text, long text, rich text, and picklist, for example). We use the comma character to delimit the individual keywords (or email addresses, for example) and then compare the comma-delimited chunks individually.

Consider these string values.

- "ketchup, mustard, pickles"
- "mustard, pickles, ketchup"

When comparing them, Advanced Approvals ignores the order and white space of the individual chunks and considers the two values equal.

These two values aren't considered equal.

- "ketchup, mustard, pickles"
- "mustard, onions, ketchup"

For Smart Approvals, this comparison is made when we look at the previous snapshot value to determine whether the value changed and whether the rule must be evaluated again.

- Approval Variables

Approval variables aggregate data from child records for evaluation in an approval condition. Advanced Approvals evaluates them in real time along with the approval condition. They provide an easier way to aggregate data in approval conditions when compared to roll-up summary fields or Apex Triggers that aggregate data and send it to a field on the object evaluated for approval. For example, your approval variable can summarize the total number of opportunity products that contain "Premium" in their name across your opportunity. (Salesforce CPQ Managed Package)

- Tracked Fields

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. You can review the tracked values to see what changes were made at various stages of the approval process. You can also configure Advanced Approvals to show a Tracked Values related list on the record submitted for approval. (Salesforce CPQ Managed Package)

- Set Up Tracked Fields

Configure a tracked field for an approval rule. (Salesforce CPQ Managed Package)

- Create an Approval Rule

Add an approval rule to your approval process and define the templates and target objects for your approval actions. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Approval Condition Fields

An approval rule runs when it meets its approval conditions relative to the rule's Conditions Met field. (Salesforce CPQ Managed Package)

Approval Variables
Approval variables aggregate data from child records for evaluation in an approval condition. Advanced Approvals evaluates them in real time along with the approval condition. They provide an easier way to aggregate data in approval conditions when compared to roll-up summary fields or Apex Triggers that aggregate data and send it to a field on the object evaluated for approval. For example, your approval variable can summarize the total number of opportunity products that contain "Premium" in their name across your opportunity. (Salesforce CPQ Managed Package)

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

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 math function 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.
Target Object	Specifies the child object that this variable aggregates. The child object must have a lookup or master-detail relationship with the object that a user is submitting for approval. **Note:** When no target objects match the filter criteria, the approval variable returns 0 for the minimum and maximum values. The approval rule uses that value when evaluating the approval condition.
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.

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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Create Approval Variables

Create an approval variable and reference it as one of your approval rule's approval conditions. (Salesforce CPQ Managed Package)

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**.

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. (Salesforce CPQ Managed Package)

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.

Tracked Fields

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. You can review the tracked values to see what changes were made at various stages of the approval process. You can also configure Advanced Approvals to show a Tracked Values related list on the record submitted for approval. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

- Get Started with Tracked Fields

Review the objects, fields, and configurations needed to set up tracked fields in Advanced Approvals. (Salesforce CPQ Managed Package)

- Set Up Tracked Fields

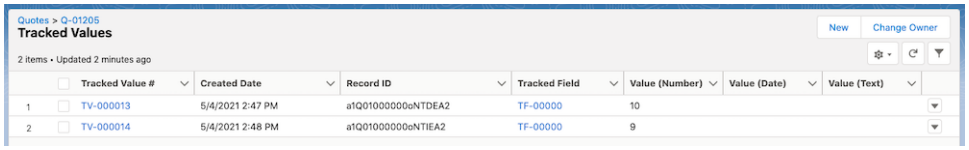
Configure a tracked field for an approval rule. (Salesforce CPQ Managed Package)

Get Started with Tracked Fields

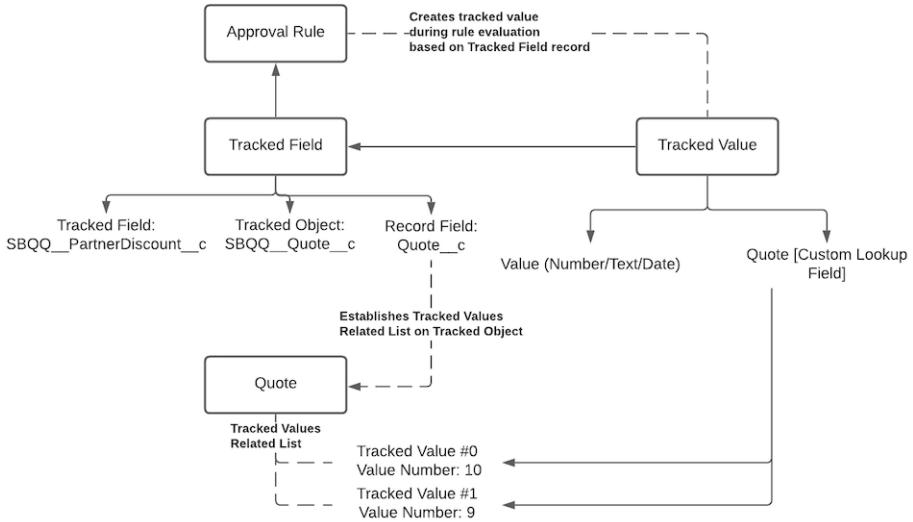
Review the objects, fields, and configurations needed to set up tracked fields in Advanced Approvals. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

Tracked fields help you and your sales reps review how a field evaluated in approvals has changed over the history of the record submitted for approval. For example, let’s say your approval rule fires when the quote’s Partner Discount field is 10% or greater. A sales rep submits a quote with a Partner Discount of 10%, which is rejected, and then resubmits with a partner discount of 9%, which is approved. Your quote has a Tracked Values related list that shows two Tracked Value records: one for the 10% submission, and one for the 9% submission.



Setting up a Tracked Field configuration requires a few components. We can use a flowchart to view how they’re related. In this example, we want to track the Partner Discount field on the CPQ quote object.



When your approval rule evaluates a tracked field, it creates a Tracked Value record to store information about the field's value. The Tracked Value record looks up to the record containing the evaluated field. By default, it contains an Opportunity lookup field. If your tracked object isn’t an opportunity, go to the Tracked Value Custom Object page and add a custom lookup field for that object. In this example, your tracked object is a CPQ quote, so your Tracked Value object needs a CPQ quote lookup field.

Advanced Approvals makes the tracked value records on its own. The only record that you must make is the Tracked Field record on your approval rule. It has four fields.

Tracked Object

The object containing the field that you want to track. This field contains only the Opportunity value by default. To use a different object, add its API name to the picklist.

Tracked Field

The field that you're tracking on the tracked object. Contains only the Type and Amount fields by default. To use a different field, add its API name to the picklist. In this example, you add SBQQ__PartnerDiscount__c.

Record Field

This field establishes a relationship between the tracked value and your tracked object so that the Tracked Values related list appears on your tracked object. To establish the related list, make sure that the Record Field value uses the API name of the object referenced by the custom lookup field that you added to the Tracked Value object: in this case, a CPQ quote.

Important: While other Advanced Approval fields require the SBQQ__ prefix when referring to a CPQ package field, the record field doesn't. For example, to refer to a CPQ quote, use Quote__c.

Tracking Type

Defines when Advanced Approvals create a Tracked Value record. If Any Change is selected, Advanced Approvals creates a tracked value only if the tracked field has changed from the last time the approval rule evaluated it. If All Values is selected, Advanced Approvals creates a tracked value whenever the approval rule evaluates the tracked field, even if the tracked field's value hasn't changed.

When the approval rule evaluates the tracked field for the first time, it creates a Tracked Value record. It also populates the tracked value record's custom lookup field with the record that was submitted for approval—in this case, Quote 01205. If the approval rule evaluates the tracked field again, it creates another Tracked Value record. Because your Tracked Field record has a record field, the Tracked Values related list appears on your quote with both tracked values.

Set Up Tracked Fields
Configure a tracked field for an approval rule. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. If your tracked object isn't an opportunity, add a custom lookup field for the tracked object to the Tracked Value object.
   a) From Setup, in the Quick Find box, enter `Objects`, then select Objects.
   b) Select **Tracked Value**
   c) Create a custom lookup field for your tracked object.
      For example, if your tracked field will be on a CPQ quote, create a CPQ quote lookup field.

2. On the Tracked Field object, go to the Tracked Field field and add the value and API name of the field that you want to track.
   a) From Setup, in the Quick Find box, enter `Objects`, then select Objects.
   b) Select **Tracked Field**.
   c) From the Custom Fields & Relationships table, select the Tracked Field field.
   d) From the Values related list, click **New**.
   e) Enter the value and API name of the field you want to track, and then save your changes.
      For example, if you want to track the quote's partner discount field, enter SBQQ__PartnerDiscount__c.
3. Go to the Tracked Object field and add a value and API name for the object containing your tracked field.
   a) From the Custom Fields & Relationships table, select the Tracked Object field.
   b) From the Values related list, click **New**.
   c) Enter the value and API name of the object containing your tracked field, and then save your changes.
      For example, if your tracked object is a CPQ quote, enter SBQQ__Quote__c.
4. Create the Tracked Field object on your approval rule.
   a) From your approval rule, go to the Tracked Fields related list and click **New**.
   b) 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 didn't 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.
   c) Choose the tracked field.
      This is the field that the approval rule monitors for changes.
   d) Choose the tracked object.
      This is the object that contains the tracked field.
   e) Choose a record field.
      This record field establishes a relationship between the tracked value and your tracked object so that the Tracked Values related list appears on your tracked object. To establish the related list, make sure that the Record Field value uses the API name of the object referenced by the custom lookup field that you added to the Tracked Value object. For example, if your tracked value's custom field looks up to a CPQ quote, use Quote__c for your record field.

      Important: While other Advanced Approval fields require the SBQQ__ prefix when referring to a CPQ package field, the record field doesn't. For example, to refer to a CPQ quote, use Quote__c.

Set Up Tracked Fields
Configure a tracked field for an approval rule. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

1. If your tracked object isn't an opportunity, add a custom lookup field for the tracked object to the Tracked Value object.
   a) From Setup, in the Quick Find box, enter `Objects`, then select Objects.
   b) Select **Tracked Value**
   c) Create a custom lookup field for your tracked object.
      For example, if your tracked field will be on a CPQ quote, create a CPQ quote lookup field.
2. On the Tracked Field object, go to the Tracked Field field and add the value and API name of the field that you want to track.
   a) From Setup, in the Quick Find box, enter `Objects`, then select Objects.
   b) Select **Tracked Field**.
   c) From the Custom Fields & Relationships table, select the Tracked Field field.
   d) From the Values related list, click **New**.
   e) Enter the value and API name of the field you want to track, and then save your changes.
      For example, if you want to track the quote's partner discount field, enter SBQQ__PartnerDiscount__c.
3. Go to the Tracked Object field and add a value and API name for the object containing your tracked field.
   a) From the Custom Fields & Relationships table, select the Tracked Object field.
   b) From the Values related list, click **New**.
   c) Enter the value and API name of the object containing your tracked field, and then save your changes.
      For example, if your tracked object is a CPQ quote, enter SBQQ__Quote__c.
4. Create the Tracked Field object on your approval rule.
   a) From your approval rule, go to the Tracked Fields related list and click **New**.
   b) 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 didn’t 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.
   c) Choose the tracked field.
      This is the field that the approval rule monitors for changes.
   d) Choose the tracked object.
      This is the object that contains the tracked field.
   e) Choose a record field.
      This record field establishes a relationship between the tracked value and your tracked object so that the Tracked Values related list appears on your tracked object. To establish the related list, make sure that the Record Field value uses the API name of the object referenced by the custom lookup field that you added to the Tracked Value object. For example, if your tracked value's custom field looks up to a CPQ quote, use Quote__c for your record field.

      Important: While other Advanced Approval fields require the SBQQ__ prefix when referring to a CPQ package field, the record field doesn’t. For example, to refer to a CPQ quote, use Quote__c.

Create an Approval Rule

Add an approval rule to your approval process and define the templates and target objects for your approval actions. (Salesforce CPQ Managed Package)

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.
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.

   The Advanced Approvals package evaluates approval rules with approval step values of 1 or larger. Rules with negative or null approval step values aren’t evaluated.
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.

   When the approver on the approval rule is a group, all users of the group appear in the approval step. If any user in the group has a delegate, those delegates aren’t included as approvers.
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. (Salesforce CPQ Managed Package)

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. If you have advanced conditions while the approval rule’s Conditions Met field equals Custom, Advanced Approvals evaluates all of the rule’s approval conditions. If you want to evaluate only approval conditions that fall within the scope of your advanced condition, remove any unneeded approval conditions from your approval rule.
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 Recipients	The recipients of this approval rule's email notifications.
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.
Conditions Met	Defines whether this rule must meet all or any of its approval conditions in order to evaluate an approval.
Effective Date Field	Looks up 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 doesn't evaluate this rule after this date. This field is optional.
Effective Start Date	Salesforce CPQ doesn't evaluate this rule before this date. This field is optional.
Excluded Statuses	Salesforce CPQ doesn't apply this rule to approvals with any of the chosen statuses.
Override Field	Looks up to a field that overrides the value of your approval rule's conditions. If your approval rule includes this field, when you create a quote that causes an approval condition to evaluate to `true`, the quote requires approval. A value evaluates to `true` if string = `true` or 1, Boolean = `true`, or Decimal isn't zero.
Parallel	All approvals at an approval step happen in parallel. Select this field only if you're using Advanced Approvals with native approvals.
Recall Template	The email template that this rule sends for approval recalls.
Rejection Recipients	The email template that this rule sends for approval rejections.
Reevaluate Smart Approvals Individually	Reevaluate 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.
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.
Target Object	The object that this rule evaluates. When a user submits a record for an approval, Advanced Approvals evaluates all active approval rules targeting that record's object.

Approval Condition Fields
An approval rule runs when it meets its approval conditions relative to the rule's Conditions Met field. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

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.
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.
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).
Operator	The operator used to compare the condition's tested field or tested variable against the filter field or filter value.
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.

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. (Salesforce CPQ Managed Package)

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.

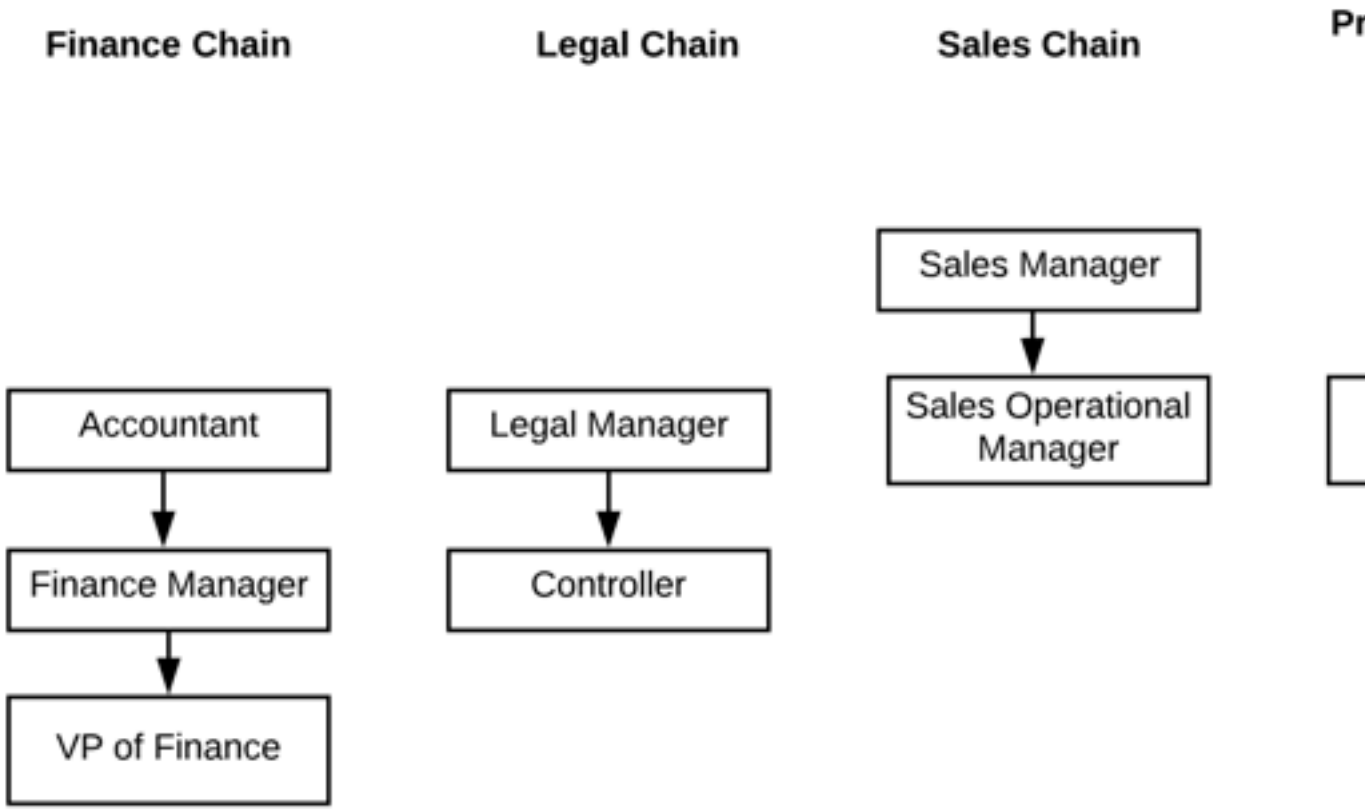
Approval Rule 1	Approval Chain: 1 Approval Step: 1 Approver: Accountant
Approval Rule 2	Approval Chain: 1 Approval Step: 2 Approver: Finance Manager
Approval Rule 3	Approval Chain: 1 Approval Step: 3 Approver: VP of Finance

You can also run several approval chains simultaneously. All chains are initiated when an approval is requested, even if they begin on different steps. 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 final 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.

We’ve outlined this approval path in the following diagram. As soon as the approval is requested, the first approver in each chain receives the approval request. After they approve, the approval request moves to the next approver in the chain. 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. (Salesforce CPQ Managed Package)

Set Up Approval Chains

Add an approval chain to your approval rule. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

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.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

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: An approver approves one of their approval requests. This action changes the record's Approval Status field value to Approved at the end of the approval cycle. Advanced Approvals then sends an approval email to the users from the approval recipient list (Owner, Record Created By, Initial Submitter).
- Rejection: An approver rejects an approval request. This action changes the record's Approval Status field value to Rejected at the end of the approval cycle. Advanced Approvals then sends a rejection email to the users from the rejection recipient list (Owner, Record Created By, Initial Submitter).
- Recall: A sales rep recalls an approval so they can revise a record before it's approved. This action changes the object's Approval Status field value to Recalled at the end of the approval cycle. Advanced Approvals then sends a recall email to the Assigned To user or the users from the assigned group.

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.

Note: If a user replies to an approval email with an invalid keyword, Advanced Approvals halts the approval process and sends them an email stating "Unrecognized Keyword." The user can still respond to the original approval email with a valid keyword to move forward with the approval process.

- 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. (Salesforce CPQ Managed Package)
- 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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

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 **Classic 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) Set Related To Type to **sbaa__Approval__c**, and then save your changes.
   j) In your template, click **Edit Template** to add the text and any markup that you want to show in your approval email. The email template must contain a reference to the ID of your approval record. The reason ID must be at the top of the template.
      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: `<p style="color:white"><apex:outputText value="{!relatedTo.ID}"/></p>`
   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**.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

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

Smart approvals let you streamline the approval resubmission process for your sales reps. When you enable smart approvals on an approval condition, Advanced Approvals compares the condition's tested field value during resubmission with the tested value of the previous submission. If the values are the same, the approvers for that rule aren't asked to approve it again during resubmission. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Enable smart approvals by selecting **Enable Smart Approvals** on an approval condition. 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 compares the snapshot value with the value of the new tested field, using the condition's logical operator. If the comparison still evaluates to `true`, the approval condition returns `true`.

Important:

- If you enable smart approvals on a condition that uses the equals operator, snapshot comparisons always return `false`. We recommend avoiding smart approvals on conditions with the equals operator.
- Approval snapshots don't update for auto-approved approvals.

Let's look at a basic example. Your sales rep submits a quote under the following approval rule.

Approval Rule	Approver: Finance Team Condition 1 • Net Total > $60,000 • Smart Approvals: `true`

A sales rep submits a quote with a net total of $70,000 for approval. Because the tested field meets the approval condition, Advanced Approvals sends the quote to the finance team, who approves it. The sales rep revises the quote so it has a net total of $75,000, then resubmits it for approval.

Because smart approvals are active on your condition, Advanced Approvals creates an approval snapshot on your approval record. The approval snapshot has an Approved Value (Numeric) field with a value of $70,000, representing the original tested value. Advanced Approvals then compares the new value to the snapshot using the condition's operator of >=. Because $75,000 is greater than $70,000, the condition returns `true`, and Advanced Approvals sends the quote to the finance team for reevaluation. If the net total didn't change or was less than $70,000, the condition returns `false`, and the approval doesn't require resubmission.

Managing Mixed Conditions

Approval rules can contain a mix of smart and standard approval conditions. When a sales rep resubmits a record for approval, a standard condition evaluating to `true` isn't always enough to qualify the record for reevaluation. Often, smart approvals and conditional logic cause the overall conditional logic to evaluate as `false`. Let's look at an example.

Approval Rule	Approver: Sales Manager Condition 1 • Opportunity Type: New • Smart Approvals: Disabled Condition 2 • Service Discount > 15% • Smart Approvals: Enabled Condition 3 • Subscription Discount > 15% • Smart Approvals: Enabled Rule Condition: 1 AND (2 OR 3)

Your sales rep submits a quote that meets all three conditions, which gives a rule condition of `true` AND (`true` OR `true`) = `true`. Because the condition is `true`, Advanced Approvals submits the quote to the Sales Manager, who approves it. The sales rep recalls the approval, changes nonconditional tested fields, then resubmits it.

Condition 1 returns `true`. Because conditions 2 and 3 are smart approvals, Advanced Approvals checks whether the tested value's original state and its new state are different. They aren't different, so Conditions 2 and 3 return `false`. This new logic returns the condition `true` AND (`false` OR `false`) = `false`.

Because the final logic is `false`, Advanced Approvals doesn't resubmit the approval request to the Sales Manager, even though the first condition returns `true`.

Advanced Approvals Rule Evaluation and Smart Approvals: Comma-Delimited Comparison

A keyword-like comparison of a string field occurs in Rule Evaluation and Smart Approvals. All string-based fields use it (text, long text, rich text, and picklist, for example). We use the comma character to delimit the individual keywords (or email addresses, for example) and then compare the comma-delimited chunks individually.

Consider these string values.

- "ketchup, mustard, pickles"
- "mustard, pickles, ketchup"

When comparing them, Advanced Approvals ignores the order and white space of the individual chunks and considers the two values equal.

These two values aren't considered equal.

- "ketchup, mustard, pickles"

- “mustard, onions, ketchup”

For Smart Approvals, this comparison is made when we look at the previous snapshot value to determine whether the value changed and whether the rule must be evaluated again.

- Reevaluating Smart Approvals Individually

If you want your approval rule to send approvals for evaluation when any one of its conditions changes, regardless of the overall conditional logic, select the approval rule’s Reevaluate Smart Approvals Individually field. While the field is active, Advanced Approvals compares a smart condition’s previous tested value with the new value during resubmission. If the comparison evaluates to `false`, Advanced Approvals ignores conditional logic and sends the record to the approver. (Salesforce CPQ Managed Package)

- Smart Approvals with the Equals or Contains Operators

When a smart approval compares the snapshot and present value of a condition that uses the Equals or Contains operators, unchanged values return `false` for that condition in the overall rule condition logic. In this case, an unchanged value for an Equals or Contains means that no value difference between the snapshot and current value exists, so reevaluating that specific condition isn't required. (Salesforce CPQ Managed Package)

- Advanced Use Cases for Smart Approvals

Approval rules that use complex rule conditions with a mixture of smart and standard approval conditions can cause unexpected results when a sales rep resubmits a record. When you use smart approvals, take note of cases where unchanged conditions require reapproval or where changed conditions don’t require reapproval. If your rule requires a complex logical statement for its rule condition, we recommend spending time reviewing how different complex logical statements can return `true` or `false`. (Salesforce CPQ Managed Package)

Reevaluating Smart Approvals Individually

If you want your approval rule to send approvals for evaluation when any one of its conditions changes, regardless of the overall conditional logic, select the approval rule’s Reevaluate Smart Approvals Individually field. While the field is active, Advanced Approvals compares a smart condition’s previous tested value with the new value during resubmission. If the comparison evaluates to `false`, Advanced Approvals ignores conditional logic and sends the record to the approver. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ’16 and later with Advanced Approvals 3.1 and later

Important: Approval snapshots don’t update for auto-approved approvals.

To enable this feature, select the **Reevaluate Smart Approvals Individually** field on your approval rule.

Your sales rep submits a quote line for approval under the following approval rule.

Approval Rule	Reevaluate Smart Approvals Individually: Enabled Approver: Sales Manager Condition 1 • Quantity > 0 • Smart Approvals: Enabled Condition 2 • Additional Discount > 0% • Smart Approvals: Enabled Condition 3 • Partner Discount > 0%

- Smart Approvals: Enabled

Rule Condition: (1 OR 2) AND 3

The quote has a quantity of 10, additional discount of 0%, and partner discount of 20%, which provides the logical statement of (`true` OR `false`) AND `true` = `true`. The condition evaluates to `true`, so Advanced Approvals sends the quote to the Sales Manager, who approves it. The sales rep recalls the quote, then updates the tested fields.

- Quantity: 20
- Additional Discount: 0%
- Partner Discount 20%

Upon resubmission, Condition 3 becomes `false` because the value of Partner Discount didn't change. The rule condition's logic is now (`true` OR `false`) AND `false` = `false`. However, because the rule uses Reevaluate Smart Approvals Individually, Advanced Approvals recognizes that the tested value for Condition 1 changed, and so the results are ignored. Advanced Approvals sends the quote to the Sales Manager for reevaluation.

Smart Approvals with the Equals or Contains Operators
When a smart approval compares the snapshot and present value of a condition that uses the Equals or Contains operators, unchanged values return `false` for that condition in the overall rule condition logic. In this case, an unchanged value for an Equals or Contains means that no value difference between the snapshot and current value exists, so reevaluating that specific condition isn't required. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

A sales rep submits a quote for approval under the following approval rule.

Approval Rule

Rule Condition: 1 AND (2 OR 3)
Reevaluate Smart Approvals Individually: Disabled
Condition 1

- Enable Smart Approvals: True
- Tested Field: SBQQ__Type__c
- Operator: Equals
- Filter Type: Value
- Filter Value: Quote

Condition 2

- Enable Smart Approvals: True
- Tested Field: SBQQ__Number1__c
- Operator: Greater than
- Filter Type: Value
- Filter Value: 2

Condition 3

- Enable Smart Approvals: True
- Tested Field: SBQQ__Number2__c

	• Operator: Greater than • Filter Type: Value • Filter Value: 2

The quote has a Type field of Quote, a Number1 value of 3, and a null Number2 value, so its rule condition evaluates to `true` AND (`true` OR `false`) = `true`. Because the condition evaluates to `true`, Advanced Approvals sends out an approval request.

Later, the sale rep recalls the quote, changes Number1 to 0, changes Number2 to 3, and resubmits the quote. During smart approval reevaluation, Advanced Approvals takes each condition that originally returned `true` and compares the current values of each condition with their snapshots from the first submission.

Condition 1	The snapshot value of Quote equals the new value of Quote. Due to the smart approval logic used with matching results for Equals and Contains statements, the condition now returns a value of `false`.
Condition 2	The new value of 0 isn't greater than the snapshot value of 3. Therefore, this condition requires re-evaluation, so it returns a value of `true`.

After the comparisons, the rule condition returns a statement of `false` AND (`true` OR `false`), which evaluates to `false`. Therefore, the quote is approved automatically. Due to your rule condition's logical statement and the fact that Condition 1 reevaluated to `false`, the quote doesn't require reapproval, even though your second and third conditions changed between evaluations.

Advanced Use Cases for Smart Approvals
Approval rules that use complex rule conditions with a mixture of smart and standard approval conditions can cause unexpected results when a sales rep resubmits a record. When you use smart approvals, take note of cases where unchanged conditions require reapproval or where changed conditions don't require reapproval. If your rule requires a complex logical statement for its rule condition, we recommend spending time reviewing how different complex logical statements can return `true` or `false`. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later with Advanced Approvals 3.1 and later

Remember that an approval rule can have standard conditions and smart conditions together. Let's review how Advanced Approvals evaluates the approval resubmission process when you use mixed conditions together with complex conditional logic.

Rules with smart conditions can still require re-evaluation if a sales rep resubmits a record without changing any of the tested conditions. You often see this situation in rules with complex rule conditions and mixed condition types, where one smart condition moving from true to false isn't enough to change the condition's overall logical result. Let's look at an example.

Your sales rep submits a quote under the following approval rule.

Approval Rule	Approver: Sales Manager Condition 1 • Opportunity Type = New

	• Smart Approvals: Disabled Condition 2 • Service Discount > 15% • Smart Approvals: Disabled Condition 3 • Subscription Discount > 15% • Smart Approvals: Enabled Rule Condition: 1 AND (2 OR 3)

The quote meets all three conditions, which returns the logical statement `true` AND (`true` OR `true`) = `true`. The statement returns `true`, so Advanced Approvals submits the quote to the Sales Manager, who approves it. The sales rep then recalls the approval, changes a noncondition value, and resubmits the quote.

Because Condition 3 is a smart approval, Advanced Approvals checks whether the tested value's original state and its new state are different. They aren't different, so Condition 3 now returns `false`, and the new logical statement is `true` AND (`true` OR `false`) = `true`. The logic still evaluates to True, so Advanced Approvals sends another approval request to the Sales Manager.

When rules use mixed condition types, conditional logic can also cause a resubmitted approval not requiring reevaluation, even when a condition changes. Let's look at an example.

Your sales rep submits a quote line under the following approval rule.

Approval Rule	Approver: Sales Manager Condition 1 • Quantity < 10 • Smart Approvals: Disabled Condition 2 • Additional Discount > 10% • Smart Approvals = Enabled

The quote has a quantity of 9 and additional discount of 15%, which returns the logical statement `true` OR `false` = `true`. The statement returns `true`, so Advanced Approvals submits the quote to the Sales Manager, who approves it. The sales rep recalls the approval, changes a nonconditional value, and then resubmits it.

Because condition 2 is a smart approval, Advanced Approvals checks whether the tested value's original state and its new state are different. They aren't different, so Condition 2 returns `false`, and the new logical statement is `true` OR `false` = `true`. The logic still evaluates to True, so Advanced Approvals sends another approval request to the Sales Manager, who approves it.

Finally, the sales rep recalls the quote a second time, changes the quantity to 11, and resubmits it. The first condition returns `false`, and because the tested value for our smart condition hasn't changed, the second condition still returns `false`. This configuration provides the logical statement `false` OR `false` = `false`. Because the logic evaluates to `false`, Advanced Approvals doesn't send an approval request to the sales manager.

Let's review an approval rule that uses mixed conditions with a complex rule condition.

Approval Rule	Approver: Sales Manager Condition 1 • Opportunity Type = New • Smart Approvals: Disabled Condition 2 • Service Discount > 15% • Smart Approvals: Enabled Condition 3 • Subscription Discount > 15% • Smart Approvals: Enabled Condition 4 • Net Total > $500,000 • Smart Approvals: Disabled Condition 5 • Customer Type = Partner • Smart Approvals: Enabled Rule Condition: 1 AND (2 OR 3 OR 4 OR 5)

Your sales rep submits a quote where conditions 1 and 2 are true, while the remaining conditions are false. This configuration provides a logical statement of `true` AND (`true` OR `false` OR `false` OR `false`) = `true`, so Advanced Approvals submits the quote to the Sales Manager, who approves it. The sales rep recalls the quote, changes several nonconditional fields, and resubmits it.

Because none of the smart conditions changed their tested fields, conditions 2, 3, and 5 return `false`. This configuration provides a logical statement of `true` AND (`false` OR `false` OR `false` OR `false`) = `false`, so Advanced Approvals doesn't resubmit the approval.

However, what happens if the resubmitted quote met conditions 1, 2, and 4? In this case, your logical statement is `true` AND (`true` OR `false` OR `true` OR `false`). This statement evaluates to `true`, so Advanced Approvals sends the quote to the Approval Manager.

Managing Advanced Approval Permissions for Salesforce CPQ (Managed Package)

Admins and sales reps require different types of permissions based on the actions they want to perform in Advanced Approvals. (Salesforce CPQ Managed Package)

Important: Revenue Cloud has an approval process feature that shares the same name, Advanced Approvals. If you are a Revenue Cloud customer, See Manage Approval Processes in Revenue Cloud.

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. (Salesforce CPQ Managed Package)

- Permissions for Advanced Approval Actions

If you don't want to assign a user the full Advanced Approvals Admin or Advanced Approvals User permission sets, you can instead assign permissions for individual Advanced Approvals actions. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

Assign Advanced Approval Permission Sets

You can assign users either admin-level or user-level permissions. (Salesforce CPQ Managed Package)

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**.

Related reference

Salesforce 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. (Salesforce CPQ Managed Package)

Permissions for Advanced Approval Actions

If you don't want to assign a user the full Advanced Approvals Admin or Advanced Approvals User permission sets, you can instead assign permissions for individual Advanced Approvals actions. (Salesforce CPQ Managed Package)

Permissions for Advanced Approval Actions

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The "[Object being approved]" item reviews to the object that the sales rep originally submitted as part of the approval process, such as an opportunity or quote.

Action	Create	Read	Update	Delete	Notes
Submit Approval	• Approval • Approval Snapshot	• Approval • Approval Chain • Approval Condition • Approval Rule • Approval Variable • Approver • Email Template • [Object being approved]	• Approval	None	—
Recall Approval	None	• Approval • Approval Chain • Approval Rule • Approver • [Object being approved]	• Approval	None	—
Preview Approval	• Approval • Approval Snapshot	• Approval • Approval Chain • Approval Condition • Approval Rule • Approval Variable • Approver • Email Template • [Object being approved]	• Approval	None	—

Action	Create	Read	Update	Delete	Notes
Reassign Approval	None	• Approval • Approval Chain • Approval Rule • Approver • Email Template • [Object being approved]	• Approval	None	—
Approve or Reject Approval	• Approval • Approval Snapshot	• Approval • Approval Chain • Approval Condition • Approval Rule • Approval Variable • Approver • Email Template • [Object being approved]	• Approval	None	To approve or reject an approval request, you also need the Edit permission on these fields on the Approvals object: • Approval__c.CommentsLo • Approval__c.status__c • Approval__c.rejectedBy__ These users can approve or reject an approval request on behalf of another user: • User has the Modify All Access permission on their user profile • User is an assigned user • User is a member of an approval group

Related tasks

Assign Advanced Approval Permission Sets

You can assign users either admin-level or user-level permissions. (Salesforce CPQ Managed Package)

Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer ‘16 and later with Advanced Approvals 3.1 and later

To use the Advanced Approvals package, all users require the following permissions at a minimum.

- Read access to the User object
- Visibility to all standard fields on the User object
- Record-level access to users associated with approvers

Add further permissions based on the type of actions each user needs to perform.

User Type/ Condition	**Read**	**Create**	**Edit**	**Delete**
Create Quotes (Sales Reps)	• Quote • Quote Document • Quote Lines • Quote Templates • Template Sections • Template Content	• Quote • Quote Document • Quote Lines	• Quote • Quote Document • Quote Lines	• Quote • Quote Document • Quote Lines
Quote Templates (Admin)	• Quote Templates • Template Content • Template Sections	none	none	none
Sales Reps	• Read permissions on all Salesforce CPQ objects	none	none	none

User Type/ Condition	**Read**	**Create**	**Edit**	**Delete**
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

User Type/ Condition	**Read**	**Create**	**Edit**	**Delete**
Contracted Prices (Sales Rep)	• Contracted Prices	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
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

User Type/ Condition	Read	Create	Edit	Delete
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

Related tasks

Assign Advanced Approval Permission Sets
You can assign users either admin-level or user-level permissions. (Salesforce CPQ Managed Package)

Advanced Approvals Package Settings

Advanced Approvals package settings define Advanced Approvals features and standards across your Salesforce org. (Salesforce CPQ Managed Package)

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.
Hide Submit Button on Preview Page	Hide the Submit for Approval button on the Preview Approvals page if the record's approval status is Pending or Approved.
Inbound Approval Email (Long)	The email address for the email service used to process inbound approval emails. The value for this

	setting supports more characters than the Inbound Approval Email setting's value.
Inbound Approval Email	This setting is from an earlier version of Advanced Approvals. It works the same as Inbound Approval Email (Long) but doesn't allow for as many characters in the email address. We recommend leaving this setting blank and using Inbound Approval Email (Long) instead.
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.

Approval Fields for Salesforce CPQ Advanced Approvals

The Approval object contains fields for Salesforce CPQ Advanced Approvals. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

CPQ fields available in Salesforce CPQ Summer '16 and later.

Field	API Name	Data Type or Object	Definition
Actions	sbaa__Actions__c	String (1,300)	
Approval Chain	sbaa__ApprovalChain__c	sbaa__ApprovalChain__c	Approval chain to which this approval belongs.
Approval Step	sbaa__ApprovalStep__c	Number (3, 0)	Step (level) at which this approval is required.
Approval Template Id	sbaa__ApprovalTemplateId__c	String (18)	ID of the email template associated with this approval.
Approved By	sbaa__ApprovedBy__c	User	User who approved this approval.
Approver	sbaa__Approver__c	sbaa__Approver__c	Lookup to the approver that's associated with this approval.
Approver Field	sbaa__ApproverField__c	Picklist	Used with dynamic approvers, to capture the field name containing the Approver value.
Archived	sbaa__Archived__c	Boolean	Indicates whether this approval is archived.
Assigned Group Id	sbaa__AssignedGroupId__c	String (18)	ID of the group this approval is assigned.
Assigned To	sbaa__AssignedTo__c	User	Lookup to the user to which this approval is assigned.

Field	API Name	Data Type or Object	Definition
Assigned To Me	sbaa__AssignedToMe__c	Boolean	If the current user is also the Assigned To user, this field is set to True.
Comments	sbaa__CommentsLong__c	Text area (4,000)	Approver's comments.
Delegated Approver	sbaa__DelegatedApprover__c	sbaa__Approver__c	If Delegated Approvals is enabled, lookup to the delegated approver.
Opportunity	sbaa__Opportunity__c	Opportunity	This field is populated when an Opportunity record is submitted for approval.
Quote	Quote__c	SBQQ__Quote__c	
Recall Template Id	sbaa__RecallTemplateId__c	String (18)	ID of the email template associated with recalls.
Record Field	sbaa__RecordField__c	String (80)	API name of the Approval field looking up to the record being approved. Required.
Rejected By	sbaa__RejectedBy__c	User	User who rejected this approval.
Rejection Template Id	sbaa__RejectionTemplateId__c	String (18)	ID of the email template associated with rejection.
Request Template Id	sbaa__RequestTemplateId__c	String (18)	ID of the email template associated with approval requests.
Require Explicit Approval	sbaa__RequireExplicitApproval__c	Boolean	By default, approving any approval auto-approves all other approvals assigned to the same user. If this checkbox is selected, an approval originated.
Rule	sbaa__Rule__c	sbaa__ApprovalRule__c	Approval rule that generated this approval.
Status	sbaa__Status__c	Picklist	Status of this approval.
Unanimous	sbaa__Unanimous__c	Boolean	If the approver is a group, and if all members must approve to consider the approval approved, this checkbox is selected.

Manage Your Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later

Important:

The Salesforce CPQ managed package continues to be available for existing customers, however, there is no longer any new feature development. We will continue to provide support and services for the duration of your contract. You can also add more user licenses to your Salesforce org during your current subscription term and renew existing subscriptions.

For a more comprehensive and robust CPQ solution, we recommend exploring Revenue Cloud.

- Set Up Salesforce CPQ Orders

Configure Salesforce CPQ to use CPQ features on the order and order product objects. (Salesforce CPQ Managed Package)

- Guidelines for Setting Up Salesforce CPQ Orders

When setting up orders, review guidelines related to setup and pricing. (Salesforce CPQ Managed Package)

- Create 1 Order Per Quote

Create an order that contains every quote line from your quote. (Salesforce CPQ Managed Package)

- Create Multiple Orders from a Quote

If your Salesforce CPQ org has Allow Multiple Orders enabled, sales reps can split order products between orders manually, by quote line field, or by quote line group. They can also edit a deactivated an uncontracted quote to adjust order product quantities. (Salesforce CPQ Managed Package)

- Manage Dates for Your Orders and Order Products

Change the start dates and end dates on your orders and order products during or after order creation. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Order Fields for Salesforce CPQ and Billing

The Order object contains fields for both the CPQ and the Billing packages. API names for Billing package fields use the sbqq__ prefix. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

- Order Product Fields for Salesforce 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. (Salesforce CPQ Managed Package)

- Salesforce CPQ Quote to Order Field Mapping

Salesforce CPQ includes several important fields that map between products, quotes, orders, quote lines, and order products. Review information about these fields to understand data flow and the implications of overriding fields. (Salesforce CPQ Managed Package)

- Order Permissions in Salesforce CPQ

Depending on your settings and your company's internal processes, it can be necessary to customize order permissions for your users. (Salesforce CPQ Managed Package)

Set Up Salesforce CPQ Orders

Configure Salesforce CPQ to use CPQ features on the order and order product objects. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

1. From Setup, in the Quick Find box, enter `Order Settings`, select **Order Settings**, and then select **Enable Orders**.
2. If you want to allow sales reps to perform product swaps or decrease order product quantities in amendment orders, select **Enable Negative Quantities**.
3. Configure Salesforce CPQ package-level order settings.
   a) From Setup, in the Quick Find Box, enter `Installed Packages`, select **Installed Packages**, and then select **Configure** for Salesforce CPQ.
   b) Go to the Order tab and configure your settings as needed.
   c) To change the default start dates for your orders, select a value in the Default Start Date field.
   d) To allow sales reps to create multiple orders from a quote, select **Enable Multiple Orders**.
   This setting is only available for orgs with Salesforce CPQ+ licenses.
   e) To create orders from approved quotes only, select **Require Approved Quotes**.
4. On the user profiles for CPQ users working with orders, enable Create, Edit, and Read permissions on these fields.
   - Order: Contrated, Payment Term, Quote
   - Order Product: Quote Line, Required By

Guidelines for Setting Up Salesforce CPQ Orders

When setting up orders, review guidelines related to setup and pricing. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later.

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. On amendment and renewal quotes, you can order quote lines only with a quantity of one or greater. If any of your order products are contracted, you can't deactivate an order.

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.

Salesforce CPQ doesn't honor Unit Price decimal setting in the package. If more than 2 decimal points are specified, Salesforce CPQ rounds the values. For example, 0.005 is rounded to 0.01. Multi-currency, especially the Japanese yen, doesn't factor in the decimal at all.

When you create an order from a quote where the SBQQ_Quote_c field is populated, the relevant fields from the quote are copied to the order. However, if you edit the SBQQ_Quote_c field on a quote, the field values aren't updated on the existing order.

When fields are copied from Quote to Order, there's no field validation on the copied field values. For example, if you enter a value on a quote field that isn't valid on the corresponding order field, the invalid value is copied to the order.

Important:

- After placing an order against a quote, don't modify any parts of the quote that affect cost. Don't modify products, dates and schedules, quantity, or price.
- We recommend leaving Price Calculation Status as a read-only field. Making the field editable can cause errors during the price calculation process.
- Don't edit or delete the Status field's Draft and Activated picklist values.

- To avoid an order creation failure when you're using the enabled State / Country Picklist, if the integration value and country value don't match, enter the country code into country code fields such as SBQQ__BillingCountry__c and SBQQ__ShippingCountry__c on SBQQ_Quote.

Create 1 Order Per Quote

Create an order that contains every quote line from your quote. (Salesforce CPQ Managed Package)

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

If your Salesforce CPQ org has Allow Multiple Orders enabled, sales reps can split order products between orders manually, by quote line field, or by quote line group. They can also edit a deactivated an uncontracted quote to adjust order product quantities. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '16 and later

- Allow Multiple Orders

Enable multiple Salesforce CPQ orders so that sales reps can split up their quotes. (Salesforce CPQ Managed Package)

- Enable Order Product Editing

If your Salesforce CPQ org has multiple orders enabled, add the Edit Order Products button so that sales reps can edit order products on a deactivated and uncontracted order. Sales reps can remove order products from the order and can increase or decrease order product quantities. This feature is helpful when reps need to change order products before finalizing the order. (Salesforce CPQ Managed Package)

- Split Orders Manually by Quantity

Manually split your quote lines into order products on an order. (Salesforce CPQ Managed Package)

- Split Orders by Quote Line Group

Automatically split your quote into orders based on your quote's quote line groups. (Salesforce CPQ Managed Package)

- Split Orders by Quote Line Field

Automatically group your order products into orders based on shared values for a user-selected quote line field. (Salesforce CPQ Managed Package)

- Edit Order Product Quantities

Change the quantity of order products on your order. (Salesforce CPQ Managed Package)

- Guidelines for Splitting Orders

When you work with split orders, follow these important guidelines. (Salesforce CPQ Managed Package)

Allow Multiple Orders
Enable multiple Salesforce CPQ orders so that sales reps can split up their quotes. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '16 and later

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Go to Salesforce CPQ and then click **Configure**.
3. Select the **Orders** tab.
4. Select **Allow Multiple Orders**.

Enable Order Product Editing
If your Salesforce CPQ org has multiple orders enabled, add the Edit Order Products button so that sales reps can edit order products on a deactivated and uncontracted order. Sales reps can remove order products from the order and can increase or decrease order product quantities. This feature is helpful when reps need to change order products before finalizing the order. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '16 and later

1. Make sure the CPQ Orders package setting **Allow Multiple Orders** is selected.
2. On the order page layout, add the Edit Order Products button.

Related tasks

Edit Order Product Quantities
Change the quantity of order products on your order. (Salesforce CPQ Managed Package)

Split Orders Manually by Quantity
Manually split your quote lines into order products on an order. (Salesforce CPQ Managed Package)

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

Before you begin, make sure the CPQ Orders package setting **Allow Multiple Orders** is selected.

1. On your opportunity or quote, click **Create Order**.
2. Complete the detail fields, and then save your changes.
   The Select Products page shows the quantity per quote line that you have available to order from the quote and shows the quantity that has been ordered.
3. Select the checkbox to include a quote line on your order.

   The Quoted Quantity field shows 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 the Select Products page to reflect 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.

You can order a partial quantity of covered assets for a Percent of Total subscription. Salesforce CPQ brings these assets and the Percent of Total subscription onto the order, where the Percent of Total order product always has a quantity of one. The Percent of Total order product's total price equals the quantity of covered assets multiplied by the subscription quote line's list price.

Split Orders by Quote Line Group
Automatically split your quote into orders based on your quote's quote line groups. (Salesforce CPQ Managed Package)

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

Before you begin, make sure the CPQ Orders package setting **Allow Multiple Orders** is selected.

This feature is helpful if you can easily organize your quoted products by groups—for example, you can have one group for hardware, one group for apps, and one group for license subscriptions. When you order your quote, quote lines from each group go into a different order.

1. On your quote, select **Order by Quote Line Group**.
2. Select **Ordered**.

   Note: Only the Ordered field causes Salesforce CPQ to split orders based on the Order By field. If you click **Create Order**, Salesforce CPQ takes you to the Edit Order Products page for manual order splitting.

Split Orders by Quote Line Field
Automatically group your order products into orders based on shared values for a user-selected quote line field. (Salesforce CPQ Managed Package)

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

Before you begin, make sure the CPQ Orders package setting **Allow Multiple Orders** is selected.

Salesforce CPQ supports quote line field values for the Order By field. When you order a quote that has a non-null Order By field value, Salesforce CPQ looks for a quote line field with an API name that matches the Order By value. It then groups the quote lines into orders based on shared values by the chosen field. If any quote lines have a null value, they’re grouped into one order.

1. From the object management settings for CPQ quotes, edit the Order By field, and then add a picklist value for the API name of the quote line field that you want to use for grouping quote lines into different orders.
2. On your quote, select the **Order By** field, and then change its value to the value you added in Step 1.
3. Select **Ordered**, and then save your changes.

   Note: Only the Ordered field causes Salesforce CPQ to split orders based on the Order By field. If you click **Create Order**, Salesforce CPQ takes you to the Edit Order Products page for manual order splitting.

You have a quote with the following quote lines.

Name	**Quantity**	**Unit Color**
Red Monitor	3	Red

Name	Quantity	Unit Color
Blue Monitor	2	Blue
Yellow Monitor	5	Yellow
Standard Tablet	3	null
Premium Tablet	2	null

If you set Unit_Color__c as the quote's Order By value and select **Ordered**, Salesforce CPQ creates four orders.

Order	Order Product	Order Product Quantity
1	Red Monitor	3
2	Blue Monitor	2
3	Yellow Monitor	5
4	• Standard Tablet • Premium Tablet	• 3 • 2

If you have the Order By Quote Line Group selected while Order By also has a value, Salesforce CPQ organizes your orders first by quote line group and then by Order By field value.

Edit Order Product Quantities
Change the quantity of order products on your order. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ+ Summer '16 and later

You can edit order products only on inactive orders that you create while Allow Multiple Orders is enabled.

- You can't split orders for Reduced Quantity Order Products.
- You can't adjust Reduced Quantity Order Products to have an Ordered Quantity of 0.
- When returning the full quantity of an Order Product where Quoted Quantity = 0, changes to the Ordered Quantity have no effect.

The Edit Products page shows all products from your original quote. The checkbox is selected for the products currently on your order.

- Quoted Quantity: The total number of units on the quote line that created this order product.
- Ordered Quantity: The number of units that you ordered across all the orders that you made from your quote.
- Available Quantity: The number of remaining units available to add to the order. This number changes based on the edits that you make to the Quantity field.
- Quantity: Enter the updated number of units that you want 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.

Note: In Lightning, clicking the Create Order button only creates the order related to the quote. If a user then clicks Edit Order Products, order products are created for all quote lines related to the order's quote.

Related tasks

Enable Order Product Editing
If your Salesforce CPQ org has multiple orders enabled, add the Edit Order Products button so that sales reps can edit order products on a deactivated and uncontracted order. Sales reps can remove order products from the order and can increase or decrease order product quantities. This feature is helpful when reps need to change order products before finalizing the order. (Salesforce CPQ Managed Package)

Guidelines for Splitting Orders
When you work with split orders, follow these important guidelines. (Salesforce CPQ Managed Package)

- You can create up to 150 orders from one quote.
- You can't order Percent of Total separately from their covered assets.
- You can't order component product options separately from their parent bundles.
- You can split a bundle that has accessories or related products into multiple orders. However, if you contract both orders into one contract and renew or amend the contract, Salesforce CPQ doesn't reassemble the bundle on renewal or amendment quotes.
- You can order different quantities of an entire bundle. However, if the bundle contains an asset, Salesforce CPQ doesn't reassemble the product options under their respective parent bundle on renewal or amendment quotes.
- When you create an order by using the Create Order button on the renewal quote, the assets, asset parents, and child components of an asset parent are not populated unless you enable Percent of Total (Contracting from Orders) in the package settings. Zero quantity asset renewals are supported with this setting.

Manage Dates for Your Orders and Order Products

Change the start dates and end dates on your orders and order products during or after order creation. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later

Setting 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

Note: Before Salesforce CPQ Summer ’18, the order’s end date defaulted to the latest end date of all its order products. As of Salesforce CPQ Summer ’18, the order no longer populates its End Date field. Salesforce CPQ calculates order product end dates based only on the quote line logic described above, even if you provide an order end date on your own.

Change Order and Order Product Dates

You can move the order start date forward or backward on an unactivated order. When you change it, Salesforce CPQ adjusts order product dates so that they cover the same period. For example, 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

If you edit the start or end date on an order product directly, Salesforce CPQ adjusts the other date so that the order product covers the same period. However, start and end dates earlier than the parent order’s start and end dates aren’t supported.

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. If a quote has an end date, the MDQ product’s last segment’s end date is same as the quote end date.

If a quote line’s start date is changed to be earlier than the quote’s start date, Salesforce CPQ offsets the quote line to account for the difference, which carries over to resulting order products. Consider the following quote and quote line.

Quote	Start Date: 02/01/18 End Date: 01/31/19
Quote Line 1	Start Date: 12/01/17 End Date: 11/30/18

After you save the quote, Salesforce CPQ adjusts the quote line's start date.

Quote Line 1	Start Date: 02/01/18 End Date: 01/31/19

The adjustment is reflected in the resulting order.

Order	Start Date: 02/01/2018 End Date: 01/31/19
Order Product 1	Start Date: 02/01/2018 End Date: 01/31/2019
Order Product 2	Start Date: 04/01/18 End Date: 03/31/19

Related concepts

Creation of a Contract from an Order
Create a contract from an order to manage subscription products that your customers have purchased. (Salesforce CPQ Managed Package)

Order Contracting Methods in Salesforce CPQ
You can adjust the contracting method fields on your order and order products to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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 Order Bookings is enabled, all your revenue specialists have to do is set the Bookings Indicator field according to your reporting requirements.

Evergreen order products aren't included in the bookings amount.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter '18 and later

You must 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. To confirm how they work with this feature, contact your tax provider of choice.

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 as 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 Salesforce CPQ and Billing

The Order object contains fields for both the CPQ and the Billing packages. API names for Billing package fields use the sbqq__ prefix. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Field	API Name	Data Type	Definition
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.

Field	API Name	Data Type	Definition
Contracting Method	SBQQ__ContractingMethod__c	Picklist	The contracting method field controls how Salesforce CPQ sets the start dates and end dates of contracts that 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.
Estimated Tax	SBQQ__TaxAmount__c	Roll-Up Summary (SUM Order Product)	The estimated amount of tax before the order is finalized. Populated by the Salesforce Billing package's standard tax integration feature, or by external tax integration packages for Salesforce CPQ and Salesforce Billing. For more information, review your tax integration's documentation.
Order Bookings	SBQQ__OrderBookings__c	Roll-Up Summary (SUM Order Product Bookings)	Calculates the total amount of all order product bookings.

Field	API Name	Data Type	Definition
Payment Term	SBQQ__PaymentTerm__c	Picklist	Defines the schedules for how your customers pay for the invoices that you send, such as due on receipt, net 15, or net 30. Inherited from the quote's Payment Terms field. The quote's Payment Terms field is an editable picklist field, while the order's Payment Term field is restricted to a global picklist value set. If an admin adds a custom picklist value to the quote's Payment Term field, and then a sales rep order the quote, Salesforce CPQ encounters an error.
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 upload usage, Salesforce Billing prices the usage based on the rules and prices defined in the price schedule.
Price Calculation Status Message	SBQQ__PriceCalcStatusMessage__c	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.

Field	API Name	Data Type	Definition
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.

Order Product Fields for Salesforce 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. (Salesforce CPQ Managed Package)

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions
CPQ fields are available in Salesforce CPQ Summer '16 and later.
Salesforce Billing fields are available in Salesforce Billing Winter '18 and later.

Note: "SBQQ__" fields come with the Salesforce CPQ package, and "blng__" fields come with the Salesforce Billing package.

CPQ Fields

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__Status__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.

Field	API Name	Data Type	Definition
Asset	SBQQ__Asset__c	Lookup(Asset)	The asset that Salesforce CPQ created when you contracted this order product.
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.'
Bundle Root	SBQQ__BundleRoot__c	Lookup(Order Product)	For component order products, this field lists the bundle parent of the top-level bundle. If the bundle root order product is deleted, Salesforce CPQ also deletes the component order product.
Charge Type	SBQQ__ChargeType__c	Picklist	This field indicates whether you charge customers for this order product one time, as a recurring charge, or based on customer usage. The charge type inherits its value from the quote line that created this order product.

Field	API Name	Data Type	Definition
Contract	SBQQ__Contract__c	Lookup(Contract)	The contract you created from this order product.
Contract Action	SBQQ__ContractAction__c	Picklist	The contracting action that created the 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 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's 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.

Field	API Name	Data Type	Definition
Estimated Tax	SBQQ__TaxAmount__c	Currency(16,2)	Salesforce CPQ estimated tax for the order product. This field isn't related to tax calculation or tax estimation in Salesforce Billing.
Full-Term Net Unit Price	SBQQ__UnproratedNetPrice__c	Currency(14,2)	The full-term net price for this order product. Inherited from the quote line. This field is deprecated as of Salesforce Billing Summer '18.
Order Product Bookings	SBQQ__OrderProductBookings__c	Formula	If the Bookings Indicator is set to 'Include,' this field shows the 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.
Price Dimension	SBQQ__PriceDimension__c	Lookup(Price Dimension)	The price dimension applied to MDQ order products. The order product inherits the price dimension lookup from the quote line.
Price Schedule	SBQQ__PriceSchedule__c	Lookup(Price Schedule)	The price schedule applied to usage order products. The order product inherits the price schedule lookup from the quote line.

Field	API Name	Data Type	Definition
Pricing Method	SBQQ__PricingMethod__c	Picklist	Shows whether this order product's parent quote line was priced based on list pricing or cost pricing. Salesforce CPQ calculates list pricing by applying discounts to a list price, and calculates cost pricing by applying markups to a cost price.
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 set up the proper page layout. For any legacy quote lines, this value is null.
Prorate Multiplier	SBQQ__ProrateMultiplier__c	Number(4, 4)	The ratio that's used to calculate the prorated price for subscription order products with prorated billing periods.
Quoted List Price	SBQQ__QuotedListPrice__c	Number(12, 2)	List the 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.
Revised Order Product	SBQQ__RevisedOrderProduct__c	Lookup(Order Product)	The order product that this order product has revised.
Segment Index	SBQQ__SegmentIndex__c	Number(2, 0)	The position of this MDQ order product's segment in the overall segment table.

Field	API Name	Data Type	Definition
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.
Shipping Account	SBQQ__ShippingAccount__c	Lookup(Account)	Customer shipping account for the order product. Inherited from the account record.
Subscription	SBQQ__Subscription__c	Lookup(Subscription)	Subscription record created from a contracted subscription order product.
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 isn't 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. Admins set up the page layout.
Tax Code	SBQQ__TaxCode__c	Text(255)	The code used to calculate tax for order products in Salesforce CPQ. This field isn't related to tax calculation or Tax Code fields in Salesforce Billing.
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup(Discount Schedule)	The term discount schedule that applied to the quote line that created this order product.

Field	API Name	Data Type	Definition
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.

Billing Fields

Field	API Name	Data Type	Definition
Bill Through Date Override	SBQQ__BillThroughDateOverride__c	Date	Provides an end date for the next invoice line created from this order product. For the upcoming billing cycle, this field overrides the standard invoice line end date calculated using Charge To Date and Billing Frequency. Salesforce Billing clears this field after it creates the invoice line.
Billable Unit Price	blng__BillableUnitPrice__c	Currency(16, 2)	Salesforce uses the billable unit price to calculate the subtotal on the invoice line. See Recurring Billing for Subscription Products.
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.
Billed Amount (without tax)	blng__BilledAmountwithoutTax__c	Currency(16, 2)	The sum of all this order product's invoice lines, excluding tax.
Billed Tax	blng__BilledTax__c	Currency(16, 2)	The sum of all taxes on invoice lines for an order product.
Billing GL Rule	blng__BillingGLRule__c	Lookup(GL Rule)	Billing rule for including billing transactions in an external general ledger.

Field	API Name	Data Type	Definition
Billing GL Treatment	blng__BillingGTreatment__c	Lookup(GL Treatment)	Billing treatment for including billing transactions in an external general ledger.
Billing Rule	blng__BillingRule__c	Lookup(Billing Rule)	The billing rule assigned to an order product.
Billing Treatment	blng__BillingTreatment__c	Lookup(Billing Treatment)	The billing treatment assigned to an order product.
Canceled Billing Amount (without tax)	blng__CanceledBillings__c	Currency(16, 2)	The total balance subtracted from the order product due to cancellations or swaps.
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 don't evaluate it for billing.
Group ID	blng__GroupId__c	Text(255)	After Salesforce Billing groups your order products by invoice group values, it assigns each group a unique ID (only for internal purposes).
Included Usage	blng__IncludedUsage__c	Number(16,2)	Salesforce Billing provides this amount of usage for free before charging. For example, if your usage order product has an included quantity of 10 and its usages for one billing period sum to 12, Salesforce Billing invoices only 2 quantities of usage from the usage summary. Included usage is available only for usage products using price schedules.

Field	API Name	Data Type	Definition
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)	If you set the Invoice Group field to Invoice Group ID, the invoice automation run uses the Invoice Group ID field to group the resulting invoice lines with identical values into the same invoice as invoice lines.
Invoice Run	blng__InvoiceRun__c	Lookup(Invoice Run)	The invoice run that evaluates this order product for billing.

Field	API Name	Data Type	Definition
Invoice Run Processing Status	blng_InvoiceRunProcessingStatus__c	Picklist	Shows the status of an order product as the invoice run evaluates it. • Pending Billing: A future invoice run creates another invoice line from the order product during its upcoming billing period. • Will Not Invoice: The invoice run evaluated the order product and determined it's not invoiceable. • Error: The invoice run encountered an error while trying to invoice the order product. For more information, review the invoice scheduler's error log. • In Progress: The invoice has created an invoice line but hasn't posted it yet. • Completed: The invoice run created and posted an invoice line for the order product. The order product won't create any more invoice lines.
Invoice Run Start Date	blng__InvoiceRunStartDate__c	Date/Time	The start date and time of the invoice run that evaluates this order product.
Invoice Run Status (Index)	blng__InvoiceRunStatusIndex__c	Text(255)	The stage of the invoice run that's evaluating this order product for billing. Users must not update this system field. This field is automatically updated with a text representation of the picklist value when the Invoice Run Processing Status field is updated.

Field	API Name	Data Type	Definition
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.
Lifecycle-Managed Asset	blng_Asset_c	Lookup(Asset)	The asset for the order product that is used with the Customer Asset Lifecycle Management (CALM) service.
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.

Field	API Name	Data Type	Definition
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.
Override Billable Unit Price	blng__OverrideBillableUnitPrice__c	Currency	Provides a new billable unit price for unactivated and uninvoiced evergreen subscription order products. This field is useful if you're migrating an evergreen subscription order product from outside Salesforce Billing. You can quickly define an Override Billable Unit Price rather than rerun calculations in Salesforce Billing to determine the billable unit price.
Override Initial Revenue End Date	blng__OverrideInitialRevenueEndDate__c	Date	Sets the end date of revenue recognition to any desired date. This controls the end date of any revenue schedules created from this order product.
Override Initial Revenue Start Date	blng__OverrideInitialRevenueStartDate__c	Date	Sets the start date of revenue recognition to any desired date. This controls the start date of any revenue schedules created from this order product.
Override Next Billing Date	blng__OverrideNextBillingDate__c	Date	Set a one-time custom billing date that invoice schedulers use instead of the Next Billing Date field when evaluating order products for invoicing. Salesforce Billing erases this field's value after invoicing the order product.

Field	API Name	Data Type	Definition
Pending Billing Amount (without tax)	blng__PendingBillings__c	Currency	The total amount remaining to be billed from this order product, excluding tax.
Revenue Most Likely Amount	blng__RevenueMostLikelyAmount__c	Currency(16, 2)	This field is deprecated as of Salesforce Billing Summer ‘18.
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.
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 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.
Tax Engine	blng__TaxEngine__c	Picklist	This field has been deprecated and is no longer supported.
Tax GL Rule	blng__TaxGLRule__c	Lookup(GL Rule)	Tax rule for recording tax transactions in an external general ledger.
Tax GL Treatment	blng__TaxGLTreatment	Lookup(GL Treatment)	Tax treatment for recording a tax transaction in an external general ledger.

Field	API Name	Data Type	Definition
Tax Error Message	blng__TaxErrorMessage__c	Text(255)	A message indicating that Salesforce Billing couldn't 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 Postal Code (Override)	blng__TaxZipCode__c	Text(50)	The postal code of the address that Salesforce Billing uses to calculate tax for this order product. Overrides the postal code inherited from the account.
Tax Rule	blng__TaxRule__c	Lookup(Tax Rule)	The tax rule assigned to the order product. Tax rules and their treatments define how Salesforce Billing processes tax for your transactions.
Tax State (Override)	blng__TaxState__c	Text(255)	The state of the address that Salesforce Billing uses to calculate tax for this order product. Overrides the state inherited from the account.
Tax Street 1 (Override)	blng__TaxStreet__c	Text(255)	The street of the address that Salesforce Billing uses to calculate tax for this order product. Overrides the street inherited from the account.
Tax Street 2 (Override)	blng__TaxStreet__c	Text(255)	The street of the address that Salesforce Billing uses to calculate tax for this order product. Overrides the street inherited from the account.

Field	API Name	Data Type	Definition
Tax Treatment	blng__TaxTreatment__c	Lookup(Tax Treatment)	The tax treatment assigned to the order product. Tax rules and their treatments define how Salesforce Billing processes tax for your transactions.
Terminated Billing Amount (without tax)	blng__TerminatedBillings__c	Currency	Amount available to be canceled from an order product. Can’t be more than the pending billing amount.
Total Billings	blng__TotalBilling__c	Formula(Currency)	The sum of all invoice lines, including tax, for this order product.
Usage Floor Quantity	blng__UsageFloorQuantity	Number(16,2)	The minimum usage quantity that Salesforce Billing charges for, even in the event of little or no usage. For example, if your order product has a usage floor quantity of 10, and usages sum to 7, Salesforce Billing invoices for a usage quantity of 10. Included usage is available only for usage products using price schedules.

Salesforce CPQ Quote to Order Field Mapping

Salesforce CPQ includes several important fields that map between products, quotes, orders, quote lines, and order products. Review information about these fields to understand data flow and the implications of overriding fields. (Salesforce CPQ Managed Package)

CPQ fields available in Salesforce CPQ Summer ’16 and later.

Product to Quote Line

Field	API Name
Hidden	SBQQ__Hidden__c
Optional	SBQQ__Optional__c
Price Editable	SBQQ__PriceEditable__c
Pricing Method	SBQQ__PricingMethod__c
Pricing Method Editable	SBQQ__PricingMethodEditable__c

Field	API Name
Percent of Total Base	SBQQ__SubscriptionBase__c
Percent Of Total Category	SBQQ__SubscriptionCategory__c
Percent Of Total (%)	SBQQ__SubscriptionPercent__c
Subscription Pricing	SBQQ__SubscriptionPricing__c
Percent Of Total Target	SBQQ__SubscriptionTarget__c
Subscription Term	SBQQ__SubscriptionTerm__c
Subscription Type	SBQQ__SubscriptionType__c
Term Discount Schedule	SBQQ__TermDiscountSchedule__c

Quote to Order

Field	API Name
Contracting Method	SBQQ__ContractingMethod__c
Renewal Term	SBQQ__RenewalTerm__c
Renewal Uplift (%)	SBQQ__RenewalUpliftRate__c

Quote Line to Order Product

Field	API Name
Block Price	SBQQ__BlockPrice__c
Default Subscription Term	SBQQ__DefaultSubscriptionTerm__c
Discount Schedule	SBQQ__DiscountSchedule__c
Pricing Method	SBQQ__PricingMethod__c
Product Subscription Type	SBQQ__ProductSubscriptionType__c
Prorate Multiplier	SBQQ__ProrateMultiplier__c
Required By	SBQQ__RequiredBy__c
Segment Index	SBQQ__SegmentIndex__c
Segment Key	SBQQ__SegmentKey__c
Subscription Pricing	SBQQ__SubscriptionPricing__c
Subscription Term	SBQQ__SubscriptionTerm__c
Subscription Type	SBQQ__SubscriptionType__c
Term Discount Schedule	SBQQ__TermDiscountSchedule__c

Order Permissions in Salesforce CPQ

Depending on your settings and your company's internal processes, it can be necessary to customize order permissions for your users. (Salesforce CPQ Managed Package)

Orders

Note:

- Create-level permissions on orders apply only to CPQ users who don't already have the Salesforce Billing permission set.
- Block prices and discount schedules also require Read access if any of your quote lines use them for pricing.
- For usage products on orders and percent of total (PoT) products on orders, no additional access is required to read, create, edit, or delete.
- Activating an order product as a standard user with standalone orders requires these permissions.
  - Consumption Schedule
  - Consumption Rates
  - Order Item Consumption Schedule
  - Order Item Consumption Rates

Action	**Read**	**Create**	**Edit**	**Delete**
Contract an order	• Account • Opportunity • OpportunityLineItem • Order • Order Item • Product • Quote • Quote Lines • Quote Line Groups	• Asset • Contract • Order • OrderItem • Quote • Quote Lines • Subscription • SubscribedAsset	• Asset • Contract • Order • OrderItem • Quote • Quote Lines • Subscription • SubscribedAsset	• Contract • SubscribedAsset
Contract an order (Service Cloud)	• Account • Opportunity • OpportunityLineItem • Order • Order Item • Product • Quote • Quote Lines • Quote Line Groups	• Asset • ContractLineItem • Entitlement • Order • OrderItem • Quote • Quote Lines • ServiceContract	• Asset • ContractLineItem • Entitlement • Order • OrderItem • Quote • Quote Lines • ServiceContract	• Entitlement • ServiceContract

Action	Read	Create	Edit	Delete
Create an order from an opportunity	• Account • Opportunity • OpportunityLineItem • Product • Quote • Quote Lines • Quote Line Groups	• Order • Order Item	• Order • Order Item	No additional access required
Create an order from a quote	• Account • Opportunity • OpportunityLineItem • Product • Quote • Quote Lines • Quote Line Groups	• Order • Order Item	• Order • Order Item	No additional access required
Create an order from a quote without an opportunity	• Account • Product • Quote • Quote Lines • Quote Line Groups	• Order • Order Item	• Order • Order Item	No additional access required

Manage Your Subscriptions and Assets in Salesforce CPQ

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 opportunities and orders. (Salesforce CPQ Managed Package)

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 quote's subscription products and asset records for your quote's products with asset conversion. Your

contract contains lookups to subscription records for each subscription quote line on order. For example, a subscription quote lines or order product with a quantity of five would have one subscription record with a quantity of five on the contract. Two subscription quote lines or order products for the same subscription product would have two unique subscription records on the resulting contract.

Use the contract record to track the following information for your subscriptions.

- Quantity
- Start Date
- End Date
- Renewal and amendment settings

Contracting an opportunity or order locks the original quote lines from further changes. To change those quote lines, sales reps must amend the contract and edit the quote lines on the amendment quote. If the contract is ready for renewal, they can also renew the contract and change the quote lines on the renewal quote.

Salesforce CPQ doesn’t support changing the parent product’s Subscription Pricing field after you quote and contract a subscription or asset.

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**.

Salesforce CPQ doesn't create contracts for quotes that contain only optional products.

Tip: The contract’s Active Contract Lookup field set lets you customize the columns that appear in the Active Contract Selection page.

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 opportunity 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.
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.

- 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 Managed Package)

- Creation of a Contract from an Order

Create a contract from an order to manage subscription products that your customers have purchased. (Salesforce CPQ Managed Package)

- Track Contracting Job Status

You can track the status of background contracting jobs. The spinner provides visibility by showing your contracting job progress. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Subscription Guidelines for Salesforce CPQ

Subscription records contain information about subscription products on opportunities or orders that you've contracted. (Salesforce CPQ Managed Package)

- Salesforce 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. (Salesforce CPQ Managed Package)

- Salesforce CPQ Subscription Fields

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 their field values from their subscription product quote line items or order products. (Salesforce CPQ Managed Package)

- Salesforce CPQ Asset Fields

Salesforce CPQ provides various custom managed fields for the asset object. (Salesforce CPQ Managed Package)

- Things to Know About Amendment and Renewal Services

The Large-Scale Amendment and Renewal service supports amendment and renewal actions for contracts with up to 2,000 related records. Some differences exist between the Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

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 Managed Package)

Available in: **All** Salesforce CPQ Editions

Salesforce CPQ requires the following objects and settings when you create a contract from an opportunity.

- 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. By default, Salesforce CPQ creates a contract for each group of subscription products with matching end dates.

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's start and end dates.
- If the quote line's dates are null, 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 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.

Contracting an opportunity locks the original quote lines from further changes. To change those quote lines, sales reps must amend the contract and edit the quote lines on the amendment quote. If the contract is ready for renewal, they can also renew the contract and change the quote lines on the renewal quote.

If a net-new quote line has a quantity of zero, it doesn't produce a subscription when the opportunity or order is contracted.

Note:

- When you contract an opportunity containing a subscription quote line with a zero quantity, Salesforce CPQ creates a zero-quantity subscription record on the contract. But zero-quantity products aren't supported during amendment or renewal.
- Users with read-only access to subscribed assets can create contracts and subscribed assets through the opportunity and order contracting process. Although this method isn't a standard security allowance, Salesforce CPQ supports it as a business flow.

- Salesforce CPQ Opportunity Contracting Methods

You can adjust quote fields to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

- Contracting Permissions in Salesforce CPQ

Depending on your settings and your company's internal processes, it can be necessary to customize contracting permissions for your users. (Salesforce CPQ Managed Package)

Salesforce CPQ Opportunity Contracting Methods

You can adjust quote fields to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

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. Each contract's start date is equal to the earliest start date among

	its subscription products. This value is the default contracting method value. **Note:** Salesforce CPQ creates contracts only when a user or process selects the Contracted checkbox on an opportunity or order. Amending a contract with net-new subscriptions on the amended quote while this method is active doesn't produce a new contract.
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.

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 53: Contracting Method: By Subscription End Date

Quote Line (Subscription Product)	Start 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
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

Quote Line (Subscription Product)	Start Date (Quote Line)	End Date (Quote Line)	Resulting Subscription Goes to	Contract Start Date	Contract End Date	Subscription Start Date	Subscription End Date
Release & Deployment Subscription	06/01/18	11/30/18	Contract 4	06/01/18	11/30/18	06/01/18	11/30/18

Table 54: Contracting Method (Quote): Single Contract

Quote Line (Subscription Product)	Start 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

Related concepts

Order Contracting Methods in Salesforce CPQ

You can adjust the contracting method fields on your order and order products to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Contracting Permissions in Salesforce CPQ
Depending on your settings and your company's internal processes, it can be necessary to customize contracting permissions for your users. (Salesforce CPQ Managed Package)

Action	Read	Create	Edit	Delete
Contract an opportunity (without an order)	• Account • Opportunity • OpportunityLineItem • Product • Quote • Quote Lines • Quote Line Groups	• Asset • Contract • Quote • Quote Lines • Subscription • SubscribedAsset	• Asset • Contract • Quote • Quote Lines • Subscription • SubscribedAsset	• Contract • SubscribedAsset

Creation of a Contract from an Order

Create a contract from an order to manage subscription products that your customers have purchased. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later

To contract your order, select **Contracted** on your order record, and then save your changes. The order must be related to a CPQ quote containing the subscription lines that you want to contract. 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 requires these 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 that you want to contract are activated
- A contract-based renewal method on your order's account
- An uncontracted opportunity for the quote that you ordered from
- An order product must be related to the line of the quote that the order was generated from

Salesforce CPQ sets the dates on each contract record based on these settings.

- The contract start date inherits the value in the order's Order Start Date field.
- The contract end date inherits the shared end date of the order products on that contract.
- If an additional order is contracted with products whose subscription end date is past the original contract end date, the contract end date isn't updated to match.

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.

Note: When you contract an order containing a subscription order product with a quantity of zero, Salesforce CPQ doesn't create a subscription record for it on the resulting contract. If you need a subscription with a quantity of zero, contract from the opportunity instead.

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 in Salesforce CPQ
You can adjust the contracting method fields on your order and order products to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

Related concepts

Manage Dates for Your Orders and Order Products
Change the start dates and end dates on your orders and order products during or after order creation. (Salesforce CPQ Managed Package)

Order Contracting Methods in Salesforce CPQ
You can adjust the contracting method fields on your order and order products to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

Order Contracting Methods in Salesforce CPQ

You can adjust the contracting method fields on your order and order products to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

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. Each contract’s start date is equal to the earliest start date among its subscription products. This value is the default contracting method value.

	Note: Salesforce CPQ creates contracts only when a user or process selects the Contracted checkbox on an opportunity or order. Amending an order with net-new subscriptions on the amended quote while this method is active doesn't produce a new contract.
Single Contract	Salesforce CPQ creates one contract for all your opportunity's subscription products. The single contracting method isn't available for evergreen quote lines. Evergreen and non-evergreen subscriptions must be managed on different contracts. When using single contracts, if you start a contract process and then start another contract process before the first one has finished, Salesforce CPQ creates multiple contracts. To avoid this, make sure to wait until the first contracting process has finished.

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 does't contract this order product when you contract its order.

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 55: 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

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
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
Release & Deployment Subscription	06/01/18	11/15/18	Do Not Contract	None	None	None	None	None

Table 56: 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

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
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

Related concepts

Manage Dates for Your Orders and Order Products
Change the start dates and end dates on your orders and order products during or after order creation. (Salesforce CPQ Managed Package)

Creation of a Contract from an Order
Create a contract from an order to manage subscription products that your customers have purchased. (Salesforce CPQ Managed Package)

Salesforce CPQ Opportunity Contracting Methods
You can adjust quote fields to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

Track Contracting Job Status

You can track the status of background contracting jobs. The spinner provides visibility by showing your contracting job progress. (Salesforce CPQ Managed Package)

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**.

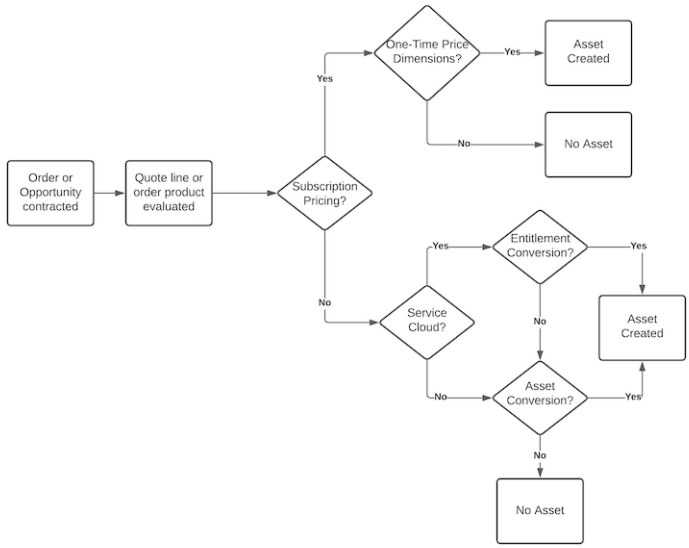
1. Next to CPQ Order Layout, click **Edit**.
2. From the top panel, navigate to Visualforce Pages.
3. Drag the **Section** label to an empty section.
4. Name the new section `OrderContracting`.
5. Deselect **Detail Page** and **Edit Page**. In layout, choose **1-Column**. Save your changes.
6. From the 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

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 Managed Package)

Available in: **All** Salesforce CPQ Editions

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. We can summarize this process with a flowchart.



1. First, Salesforce CPQ evaluates whether the product has subscription pricing. If it does, Salesforce CPQ then evaluates whether it has a one-time price dimension. If it does, Salesforce CPQ creates an asset.
2. If the product doesn't have subscription pricing, Salesforce CPQ evaluates whether it has:
   a. Entitlement conversion, for Service Cloud orgs, or
   b. Asset conversion, for Revenue Cloud orgs
3. If the product has entitlement conversion or asset conversion, Salesforce CPQ creates an asset.

The Asset Conversion field affects how Salesforce converts the source quote line's quantity to one or more asset records.

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.

- 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. (Salesforce CPQ Managed Package)

Related tasks

Amend Contracts in Salesforce CPQ
Amend your contracts when a customer wants to add new products or change products that you've quoted or sold. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Upgrade Assets
Replace an asset with a different asset from within the quote line editor. This feature is useful for processing upgrades. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later

In the Large-Scale Amendment and Renewal Service, subscription bundle parent products require non-null asset conversion.

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. One per Unit conversion isn't compatible with Slab Discount Schedules or Block Pricing.

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.

All products must have the Asset Conversion Rate set to generate assets. If the Asset Conversion Rate is NULL, no assets are generated, including virtual assets.

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)
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 for Salesforce CPQ

Subscription records contain information about subscription products on opportunities or orders that you've contracted. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

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

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

By default, this value matches the quote line start date. To override the Start Date field with a date of your choosing, enter a value for this field. If left blank, this value matches the contract start date.

Subscription End Date

By default, this value matches the quote line end date. To override the End Date field with a date of your choosing, enter a value for this field. If left blank, this value matches the contract end date.

Note: Salesforce CPQ doesn't support creating a single contract through partial ordering for custom subscriptions.

- Subscription Prorate Precision

The CPQ package setting Subscription Prorate Precision controls the formula that CPQ uses to calculate a quote line's Prorate Multiplier field. A quote line's prorate multiplier tells you how many pricing periods are in the quote line's term, while the quote line's prorated list price represents the line's list unit price multiplied by the prorate multiplier. In many cases, different subscription prorate precision values for the same quote line will result in slightly different prorated list prices for that quote line. Review subscription prorate precision options to choose the best option for your organization's subscription price calculation requirements. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

Related concepts

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. (Salesforce CPQ Managed Package)

Subscription Prorate Precision

The CPQ package setting Subscription Prorate Precision controls the formula that CPQ uses to calculate a quote line's Prorate Multiplier field. A quote line's prorate multiplier tells you how many pricing periods are in the quote line's term, while the quote line's prorated list price represents the line's list unit price multiplied by the prorate multiplier. In many cases, different subscription prorate precision values for the same quote line will result in slightly different prorated list prices for that quote line. Review subscription prorate precision options to choose the best option for your organization's subscription price calculation requirements. (Salesforce CPQ Managed Package)

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

If your quote, quote line, or quote line group has a value in its Subscription Term field, Salesforce CPQ divides the quote line's effective subscription term by its default subscription term to calculate the prorate multiplier. However, some quotes base their terms off a start date and an end date. In this case, the package's subscription prorate precision tells Salesforce CPQ whether to evaluate days, months, or both when calculating the quote line's prorate multiplier.

Let’s look at subscription prorate precision values and see how each value would affect a quote line’s prorate multiplier given the same price and subscription term. In this example, our sales rep has an MDM License subscription product with a list price of $12,000 and a one-year subscription term. After negotiating a shorter license term with a customer, they add it to a quote with a subscription term from 05/23/19 through 09/30/19.

Note:

- Our example subscription product lasts for one year, so remember to adjust the product’s subscription term based on the package-level subscription term unit. If the term unit is months, set the subscription term to 12. If the term unit is days, set the subscription term to 365.
- The prorate multiplier field that you see on CPQ objects is rounded to four decimal places. However, prorated list prices are calculated using the complete value.

Subscription Prorate Precision	Calculating Prorate Multiplier	Examples	
Day	Salesforce CPQ provides different calculations depending on whether your daily prorate precision uses daily or monthly subscription term units. If your org uses daily subscription term units, divide the number of days in your quote's term by the number of days in your quote line's default subscription term. If your quote uses monthly subscription term units, divide the number of days in your quote's term by the number of days in one full subscription term from your quote's start date. If your quote uses a start date and end date, the quote's term equals all the days in this period including the end date.	**Term Units = Day**	05/23/19 through 09/30/19 totals 131 days. Our prorate multiplier is (131/365) = 0.3589. Our prorated list price is $12000 * (131/365) = $4306.85.
		Term Units = Months	The default subscription term of 12 months from our start date of 05/23/19 puts the default end date at 05/22/20. Since 2020 is a leap year, we use 366 days when calculating the prorate multiplier. (131/366) gives us a prorate multiplier of 0.3579 and a prorated list price of $12000 * (131/366) = $4295.08. If the full subscription term includes a leap day, Salesforce CPQ uses 366 in proration multiplier calculation, even if the quote's term doesn't contain the leap day.

Subscription Prorate Precision	Calculating Prorate Multiplier	Examples	
Day with Calendar Month Weighted	This value works similarly to Day. The only difference occurs when your org uses monthly subscription term units and calculates one full subscription term. If your quote's term doesn't contain a leap day, Salesforce CPQ doesn't add an extra day to the full subscription term length. Only use 366 days if the effective subscription term actually includes a leap day. You can select this setting only if your Subscription Term Unit is Month. While this value is active, the quote line must have a default subscription term of 12. This setting is available in Salesforce CPQ Winter '20 and later.	**Term Unit = Month**	The default subscription term of 12 months from our start date of 05/23/19 puts the default end date at 05/22/20. However, since our effective subscription end date is 09/30/19, we don't include the leap day (2/29/20) in our calculations, giving us a prorate multiplier of 0.3589, or (131/365). Our prorated list price is $12000 * (131/365) = $4306.85.
Month	Divide the length of your subscription term in whole months by the product's subscription term. If your term contains a partial month, Salesforce CPQ rounds the number of months to the nearest whole number. You can select this setting only if your subscription term unit is Month.	**Term Unit = Month**	05/23/2019 through 09/22/2019 totals 4 whole months. Due to the remaining 8 days, Salesforce CPQ rounds the month total to 5. Prorate multiplier = (5 / 12) = 0.4167 Prorated list price = $12000 * (5 / 12) = $5000

Subscription Prorate Precision	Calculating Prorate Multiplier	Examples	
Monthly + Daily	Calculate the subscription term's length as its number of whole months plus a decimal for any partial month at the end of the term, then divide this value by your subscription term. The partial month equals the number of days in the month divided by (365/12). We recommend using this setting if you sell and price products by month or year but don't regularly quote for specific periods of time. You can select this setting only if your subscription term unit is Month.	**Term Unit = Month**	05/23/19 through 09/22/19 = 4 months 09/23/19 through 09/30/19 = 8 days, so we'll use (8/(365/12)) to calculate the partial month value in our prorate multiplier. Prorate multiplier = (4 + (8 / (365 / 12))) / 12 = 0.3553 Prorated list price = $12,000 * ((4 + (8 / (365 / 12))) / 12) = $4263.01.
Calendar Monthly + Daily	This setting works the same as Month + Day, but bases calculations on the exact length of the beginning month and ending month, rather than using (365/12). You can select this setting only if your subscription term unit is Month. This setting is available in Salesforce CPQ Winter '20 and later.	**Term Unit = Month**	05/23/19 through 05/31/19 = (9/31) days 06/01/19 through 08/31/19 = 3 months 09/01/19 through 09/30/19 = (30/30) days Prorate multiplier = (3 + (9 / 31 + 30 / 30)) / 12 = 0.3575 Prorated list price = $4,290.32

Subscription Prorate Precision	Calculating Prorate Multiplier	Examples
Proration Day of Month (Calendar Monthly + Daily)	While Proration Day of Month (Calendar Monthly + Daily) is active, Salesforce CPQ calculates proration periods based on quote's proration day of month. The setting uses the same formula as Calendar Monthly + Daily to calculate the prorate multipliers. When the quote's proration day of month aligns with the billing day of the month in Salesforce Billing, proration of invoices is more closely aligned to the proration on the quote.	**Term Unit = Month** **Proration Day of Month = 28** 6/28/19 through 7/27/19 = 1 complete month 7/28/19 through 10/27/19 = 3 complete months 10/28/19 through 11/15/19 =19/31 days =0.6129032258 day Prorate multiplier = (1+ 3 + (19 / 31)) / 12 = 0.3575 Prorated list price = 0.384× $4,290.32= $1,647.40 **Term Unit = Month** **Proration Day of Month = 10** 6/28/19 through 7/9/19 = 12/31 = 0.3870967742 7/10/19 through 11/9/19 = 4 complete months 11/10/19 through 11/15/19 =6/31 days =0.1935483871 day Prorate multiplier = ((12/31)+ 4 +(6 / 31)) / 12 = 0.3833333333 Prorated list price = 0.3833333333× $4,290.32= $1,644.87 **Term Unit = Month** **Proration Day of Month = 1** 6/28/19 through 6/30/19 = 3/30 = 0.1 7/1/19 through 10/31/19 = 4 complete

- Ignore Leap Year Days

CPQ can identify whether a year includes February 29. You can choose to include or ignore that date during quote line proration. (Salesforce CPQ Managed Package)

- Whole-Month Calculations

For monthly subscription term units, Salesforce CPQ calculates a whole month by adding a value of one to the original month's number for each month in the subscription term. If the result goes past the term's end date, CPQ recalculates using one value less. The period from this date until the end of the term is a partial period. (Salesforce CPQ Managed Package)

- List Price Calculation Proration Precision

Salesforce CPQ determines list price calculation based on the selected subscription proration precision and subscription term units for initial and renewal quotes. (Salesforce CPQ Managed Package)

Related information

Align CPQ and Billing Cancellation Based on Billing Periods

Ignore Leap Year Days

CPQ can identify whether a year includes February 29. You can choose to include or ignore that date during quote line proration. (Salesforce CPQ Managed Package)

When you use Day or Day with Calendar Month Weighted subscription prorate precision, Salesforce CPQ adds the quote line's default subscription term to the quote line's start date. It then evaluates whether that date range contains February 29. If so, CPQ divides the subscription term length by 366 during prorate multiplier calculations. However, you can also select the Subscriptions and Renewals package setting Ignore Leap Year Days to always use 365 days in prorate multiplier calculations.

The Ignore Leap Year Days setting appears only when Subscription Prorate Precision has a value of Day or Day with Calendar Month Weighted. The setting also affects contract renewal term calculations.

Whole-Month Calculations

For monthly subscription term units, Salesforce CPQ calculates a whole month by adding a value of one to the original month's number for each month in the subscription term. If the result goes past the term's end date, CPQ recalculates using one value less. The period from this date until the end of the term is a partial period. (Salesforce CPQ Managed Package)

Let's look at some basic examples.

Term	Calculation
12/31/2019 through 06/20/2020	We add 6 months to 12/31, which puts us at 06/31. So, we recalculate using a value of 5 to get us to 05/31. This calculation gives us a period of five full months + a partial period of (05/31 through 06/20 = 21 days).
12/30/2019 through 6/20/2020	We add 6 months to 12/30, which puts us at 06/30. So, we recalculate using a value of 5 to get us to 05/30. This calculation gives us a period of five full months + a partial period of (05/31 through 06/20 = 21 days).

When start dates fall on or near the end of the month, we run into cases where the last period's end date would be invalid.

Term	Calculation
12/31/2019 through 03/15/2020	We add 3 months to 12/31, which puts us at 03/31. When we recalculate using a value of 2, we get 02/31. Since this date is invalid, we use 02/29 instead. This calculation gives us a period of two full months + a partial period of (02/29 through 03/15 = 16 days).

When the end date is the true end date of a month, where the quote line's Default Subscription Term = 1 and Prorate Precision = Monthly + Daily, the prorate multiplier calculates a whole value only when the start date is the true start of a month.

Term	Prorate Multiplier
12/28/2020 through 2/27/2021	2
1/1/2021 through 2/28/2021	2
12/29/2020 through 2/28/2021	2.0329

Important: Prorate multipliers will be calculated differently when a quote's start date is on the 29th, 30th, or 31st of the month and the quote's second-to-last month has fewer days than the start date's value. For example, you have a quote that runs from 03/31/2022 to 03/30/2023 for a subscription that's $10 a month. In the final month of the quote, the subscription's price will be $9.03 instead of $10. This different occurs because the quote's start date is three days greater than the last day of the previous months (31 versus 28), so Salesforce CPQ subtracts three days of proration from the final month.

List Price Calculation Proration Precision
Salesforce CPQ determines list price calculation based on the selected subscription proration precision and subscription term units for initial and renewal quotes. (Salesforce CPQ Managed Package)

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

If a subscription product doesn't have a subscription term defined by setting an end date or explicitly on the quote, quote line group, or quote line level, it's calculated at the default subscription term. For example, net price = list price for each line.

If Subscription Prorate Precision = Day and Subscription Term Unit = Day in the Subscriptions and Renewals package settings, list price is defined by the number of days specified in the product description. This number is used to calculate daily proration for a subscription based on the number of days in a month. If you set Subscription Term = 12 when creating the product and set Subscription Term = 360 in a quote, quote line, or specified date range of 360 days of subscription, then the prorated multiplier is 30. For example 360 divided by 12.

For evergreen line items, the subscription term is set to 1 in order to force a unit price calculation. The calculation matches for fixed price products when this term is set to 1.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Winter ’18 and later

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.

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 57: 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 58: 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

Related reference

Salesforce CPQ Subscription Fields

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 their field values from their subscription product quote line items or order products. (Salesforce CPQ Managed Package)

Salesforce 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. (Salesforce CPQ Managed Package)

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 and 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(80)	The opportunity stage for amendment opportunities created from this contract.
Amendment Owner	SBQQ__AmendmentOwner__c	Lookup(User)	Used to assign the owner of the amendment record. This field is never automatically populated, even by default from a previous contract.
Amendment Pricebook ID	SBQQ__AmendmentPricebookId__c	Text(18)	The ID of the pricebook associated with an amendment related to this contract.

Field	API Name	Data Type	Definition
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 don't 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.

Field	API Name	Data Type	Definition
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.
MDQ Renewal Behavior	SBQQ__MDQRenewalBehavior__c	Picklist	Define how segmented subscription products appear on renewal Quotes. • De-Segmented: De-segmented products 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 or amend this contract record. The order is populated when it is created and is updated only when a contract is amended.
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.

Field	API Name	Data Type	Definition
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 doesn't 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. To apply the override to the renewal opportunity, override the stage before selecting Renewal Forecast.
Renewal Owner	SBQQ__RenewalOwner__c	Lookup(User)	Used to assign the owner of the renewal record. This field is never automatically populated, even by default from a previous contract.
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.

Field	API Name	Data Type	Definition
Renewal Term	SBQQ__RenewalTerm__c	Number(18, 0)	Set the length of the renewal. By default, the renewal term matches the contract's term.

Salesforce CPQ Subscription Fields

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 their field values from their subscription product quote line items or order products. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Account	SBQQ__Account__c	Lookup (Account)	Account that owns the subscription. This relationship is used for volume discount calculations.
Additional Discount (%)	SBQQ__Discount__c	Percent (9, 2)	Additional customer discount for this subscription expressed as a percentage.
Additional Discount (Amount)	SBQQ__AdditionalDiscountAmount__c	Currency (12, 2)	Additional customer discount for this subscription expressed as an absolute amount.
Billing Frequency	SBQQ__BillingFrequency__c	Picklist	Defines the billing frequency. Values are as follows. • Invoice Plan • Monthly • Quarterly • Semiannual • Annual • Usage
Billing Type	SBQQ__BillingType__c	Picklist	• Advance • Arrears

Field	API Name	Data Type	Definition
Bundled	SBQQ__Bundled__c	Checkbox	The subscription is included in a bundle. Bundled line items have a price of 0, and price and quantity can't be edited.
Charge Type	SBQQ__ChargeType__c	Picklist	Values are as follows: • One-Time • Recurring • Usage
Component Discounted By Package	SBQQ__ComponentDiscountedByPackage__c	Checkbox	Fixes additional discount for this component to the parent bundle discount.
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. Values are as follows. • Package • Components • Package and Components • Entire Hierarchy
Contract	SBQQ__Contract__c	Lookup (Contract)	Contract that governs this subscription.
Contract #	SBQQ__ContractNumber__c	Formula (Text)	Number of the associated contract.
Credit Product ID	SBQQ__CreditProductId__c	Formula (Text)	ID of upgrade credit product for this subscription.
Customer Price	SBQQ__CustomerPrice__c	Currency (12, 2)	Customer unit price for the product quoted by this line item. This price is the net price, excluding any partner discounts.
Dimension Type	SBQQ__DimensionType__c	Formula (Text)	Type set on the price dimension.

Field	API Name	Data Type	Definition
Discount Schedule	SBQQ__DiscountSchedule__c	Lookup (Discount Schedule)	Specify discounts in terms of percentage or amount to be discounted from the product's price using quantity purchased or term. Set quantity or term ranges in tiers of different discount percentages. The discount is applied to the list price, and the resulting total is stored in the regular price.
Discount Schedule Type	SBQQ__DiscountScheduleType__c	Picklist	Discount schedule type. Copied from the Type field in the associated discount schedule. Must be a stored value because it's used in rollup formula fields. Values are as follows. • Range • Slab
Distributor Discount	SBQQ__DistributorDiscount__c	Percent (3, 2)	This discount is applied to the partner price and reflected in the net price.
Dynamic Option ID	SBQQ__DynamicOptionId__c	Text (40)	Contains the feature ID and product ID to identify the feature and optional SKU associated with this line.
End Date	SBQQ__EndDate__c	Formula (Date)	The last date this contract is valid.
Has Consumption Schedules	SBQQ__HasConsumptionSchedule__c	Checkbox	Indicates whether this subscription has at least one consumption schedule.
List Price	SBQQ__ListPrice__c	Currency (12, 2)	List price of this subscription product.
Markup (%)	SBQQ__MarkupRate__c	Percent (6, 2)	Markup on this subscription, if expressed as a percentage.

Field	API Name	Data Type	Definition
Markup (Amount)	SBQQ__MarkupAmount__c	Currency (12, 2)	Markup on this subscription, if expressed as an amount.
Net Price	SBQQ__NetPrice__c	Currency (12, 2)	Net price of this subscription.
Number	SBQQ__Number__c	Number (5, 0)	Number indicating the related quote line's position within its group or quote. This value must be unique within the group or quote.
Option Discount (%)	SBQQ__OptionDiscount__c	Percent (3, 2)	If this subscription 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 (applies only to lines generated from options).
Option Type	SBQQ__OptionType__c	Picklist	Indicates the option type, which is copied from the related product option; determines how quantity is calculated. Types are as follows. • Component • Accessory • Related Product
Order Product	SBQQ__OrderProduct__c	Lookup (Order Product)	The order product from which this subscription was generated. Populated only when the subscription is contracted from an order.
Original Quantity	SBQQ__BundledQuantity__c	Number (10, 2)	For items with calculated quantities, this field holds the original (user-entered) quantity.
Original Quote Line	SBQQ__OriginalQuoteLine__c	Lookup (Quote Line)	Original quote line of the subscription.

Field	API Name	Data Type	Definition
Original Unit Cost	SBQQ__OriginalUnitCost__c	Currency (12, 2)	Cost of one unit of product quoted on this line item if cost schedules weren't applied.
Package	SBQQ__Bundle__c	Checkbox	Indicates whether this line item represents a bundle, that is, it includes line items for product options on the quote.
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 (32,000)	Dynamic product description generated from the components inside this bundle.
Parent Product	SBQQ__RequiredBy__c	Lookup (Product)	Parent product of this subscription.
Partner Discount	SBQQ__PartnerDiscount__c	Percent (3, 2)	If your company sells through a channel or VARI, a partner discount can be given on a quote or individual product line item. Partner discounts are applied after all automatic and discretionary discounts. The partner discount is taken into account in the partner price.
Price Dimension	SBQQ__Dimension__c	Lookup (Price Dimension)	Price dimension associated with this subscription.

Field	API Name	Data Type	Definition
Pricing Method	SBQQ__PricingMethod__c	Picklist	Indicates how the price for the related line item is calculated. "List" = discount is subtracted from list price. "Cost" = markup is added to cost. Values are as follows. • List • Cost • Percent Of Total • Block • Custom
Product	SBQQ__Product__c	Lookup (Product)	Product used to sell the subscription.
Product ID	SBQQ__ProductId__c	Formula (Text)	Convenience field to support integration with Service Cloud.
Product Name	SBQQ__ProductName__c	Formula (Text)	Name of the product referenced by this subscription.
Product Option	SBQQ__ProductOption__c	Lookup (Product Option)	Product option that generated this subscription (if any).
Product Subscription Type	SBQQ__ProductSubscriptionType__c	Picklist	By default, this field is mapped from the product. For any legacy quote line, this field is null.
Prorate Multiplier	SBQQ__ProrateMultiplier__c	Number (4, 4)	Calculated ratio used to compute prorated price.
Quantity	SBQQ__Quantity__c	Number (10, 2)	Purchased quantity of this subscription.
Quote Line	SBQQ__QuoteLine__c	Lookup (Quote Line)	Quote line that generated the subscription.
Regular Price	SBQQ__RegularPrice__c	Currency (12, 2)	Regular price of this subscription.

Field	API Name	Data Type	Definition
Renewal Price	SBQQ__RenewalPrice__c	Currency (12, 2)	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. If your account uses Uplift renewal pricing, the uplift is applied directly to the Renewal Price field.
Renewal Product ID	SBQQ__RenewalProductId__c	Formula (Text)	Product ID of the renewal subscription.
Renewal Product Option ID	SBQQ__RenewalProductOptionId__c	Formula (Text)	ID of the renewal product option defined on the product option.
Renewal Product Option Product ID	SBQQ__RenewalProductOptionProductId__c	Formula (Text)	ID of the optional SKU defined on the renewal product option.
Renewal Product Option Sub Pricing	SBQQ__RenewalProductOptionSubscriptionPricing__c	Formula (Text)	Subscription pricing defined on the optional SKU of the renewal product option.
Renewal Quantity	SBQQ__RenewalQuantity__c	Number (10, 2)	Quantity of the subscription product to be renewed.
Renewal Uplift (%)	SBQQ__RenewalUpliftRate__c	Percent (8, 3)	Rate of renewal price increases.
Renewed Date	SBQQ__RenewedDate__c	Date	Date when this subscription was renewed. If blank, it hasn't been renewed.
Required By ID	SBQQ__RequiredById__c	Text (18)	The ID of the configured SKU that requires the optional SKU.
Revised Subscription	SBQQ__RevisedSubscription__c	Lookup (Subscription)	Lookup to the revised subscription.
Root ID	SBQQ__RootId__c	Text (18) (External ID)	The ID of the subscription or asset at the root of the bundle that contains this subscription.

Field	API Name	Data Type	Definition
Segment End Date	SBQQ__SegmentEndDate__c	Date	For multi-segmented products, the end date from the original segment's associated quote line.
Segment Index	SBQQ__SegmentIndex__c	Number (2, 0)	For multi-segmented products, represents the related quote line's position in the segment table.
Segment Key	SBQQ__SegmentKey__c	Text (30)	For multi-segmented products, a shared key used to group multi-dimensional quote line items.
Segment Label	SBQQ__SegmentLabel__c	Text (25)	For multi-segmented products, a column header label (for example, "Year 1") associated with the quote line.
Segment Quantity	SBQQ__SegmentQuantity__c	Number (10, 2)	For multi-segmented products, the quantity corresponding to the segment's original quote line.
Segment Start Date	SBQQ__SegmentStartDate__c	Date	For multi-segmented products, the start date from the original segment's quote line.
Segment Uplift	SBQQ__SegmentUplift__c	Percent (7, 2)	For multi-segmented products, the uplift percentage from the original segment's quote line item.
Segment Uplift (Amount)	SBQQ__SegmentUpliftAmount__c	Currency (10, 2)	For multi-segmented products, the uplift amount from the original segment's quote line.
Special Price	SBQQ__SpecialPrice__c	Currency (12, 2)	Special price for this subscription.
Start Date	SBQQ__StartDate__c	Formula (Date)	The first effective date of this subscription.

Field	API Name	Data Type	Definition
Subscription End Date	SBQQ__SubscriptionEndDate__c	Date	On the Subscription record, this field is populated with the quote line's end date if it doesn't match the contract. If the date matches the contract, this field is blank and looks up the contract for this date information.
Subscription Start Date	SBQQ__SubscriptionStartDate__c	Date	This field is populated only when the quote line's start date and the contract's start date are the same. When the quote line's start date and the contract's start date are different, this field is blank.
Subscription Type	SBQQ__SubscriptionType__c	Picklist	By default, this field is mapped from the product. For any legacy quote line item, the value is null. For a new quote line item, the value is conditionally mapped from the default subscription type. The conditional picklist values are as follows. • Default subscription type = One-Time and available subscription type = One-Time • Default subscription type = Renewable and available subscription type = Renewable • Default subscription type = Renewable or Evergreen and available subscription type = Renewable or Evergreen • Default subscription type = Evergreen and available subscription type = Evergreen

Field	API Name	Data Type	Definition
Term Discount Schedule	SBQQ__TermDiscountSchedule__c	Lookup (Discount Schedule)	Schedule for discounts based on subscription term.
Terminated Date	SBQQ__TerminatedDate__c	Date	Date the subscription was terminated. Populated automatically when covered asset is upgraded.
Unit Cost	SBQQ__UnitCost__c	Currency (12, 2)	Unit cost of the subscription.

Related concepts

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. (Salesforce CPQ Managed Package)

Subscription Terms
A product's subscription term is the default amount of time that a subscription lasts. The CPQ package setting Subscription Term Unit controls whether the term is in months or days, and defaults to months. (Salesforce CPQ Managed Package)

Amending MDQ Products
Amend a contract containing multidimensional quoting (MDQ) products. This process is useful if you want to change a multiple-year contract partway through its term. (Salesforce CPQ Managed Package)

Related information

Knowledge Article: Legacy data upload with Renewals and Amendments in Salesforce CPQ

Salesforce CPQ Asset Fields

Salesforce CPQ provides various custom managed fields for the asset object. (Salesforce CPQ Managed Package)

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.

Field	API Name	Data Type	Definition
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.
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.

Field	API Name	Data Type	Definition
Dynamic Option ID	SBQQ__DynamicOptionId__c	Text(40)	When you contract a dynamic bundle, the resulting asset, subscription, or contract line item has a value in its Dynamic Option ID field. The dynamic option ID represents a combination of the feature ID and product ID, which lets you identify the feature and product associated with the dynamic bundle.
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.

Field	API Name	Data Type	Definition
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 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.

Field	API Name	Data Type	Definition
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 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)	Salesforce CPQ doesn't currently support this field.

Field	API Name	Data Type	Definition
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.
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

Field	API Name	Data Type	Definition
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.

Things to Know About Amendment and Renewal Services

The Large-Scale Amendment and Renewal service supports amendment and renewal actions for contracts with up to 2,000 related records. Some differences exist between the Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

If you upgraded to Salesforce CPQ in Summer ’19 or later, you’re already using the Large-Scale Amendment and Renewal service. If you upgraded to Salesforce CPQ before Summer ’19, you can switch to the Large-Scale Amendment and Renewal service at any time. In the Salesforce CPQ Subscriptions and Renewals package settings, deselect **Use Legacy Amend/Renew Service**. The Salesforce CPQ Admin permission set must be assigned to the user who authorized the Salesforce CPQ calculator during package configuration. To identify the user who authorized the Salesforce CPQ calculator, see the knowledge article Salesforce CPQ Authorize New Calculation Service best practice.

- Guidelines for Amendment and Renewal Services

Learn the guidelines to determine when to use the Large-Scale Amendment and Renewal service or the Legacy Amend/Renew service. (Salesforce CPQ Managed Package)

- Differences Between the Legacy and Large-Scale Amendment and Renewal Services

The Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service determine some data differently, such as renewal price and quote start dates. If you switch to the large-scale service, adjustments can be required, and an optional Visualforce component provides extra functionality. (Salesforce CPQ Managed Package)

Related concepts

Guidelines for Bundle Renewals

Guidelines for replacing product options on renewal and reevaluating bundle logic. (Salesforce CPQ Managed Package)

Guidelines for Amendment and Renewal Services

Learn the guidelines to determine when to use the Large-Scale Amendment and Renewal service or the Legacy Amend/Renew service. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Renewal Opportunity Field on Co-Terminated Contracts

When a user renews co-terminated contracts on an account, the Renewal Opportunity field on the contracts must be empty.

Renewal Product Option

To replace a product on a renewal quote, a user must specify the product in the Renew Product Option field on the Product Option record.

Renewal of Bundle Subscription Contract

When Large-Scale Amendment and Renewal is enabled and you renew a contract, renewed child subscriptions from a contract other than the parent subscription contract aren't automatically included on the renewed parent contract. To include these child subscriptions, enable Legacy Amendment and Renewal Services , or manually clone the child subscription on the parent subscription.

Organization-Wide Default Sharing Settings for Products

If the org-wide default sharing setting for products is Private, users can’t amend or renew certain records, depending on the service you use.

- If the default is Private and you use the Large-Scale Amendment and Renewal service, users can’t amend or renew assets.
- If the default is Private and you use the Legacy Amend/Renew service, users can’t amend or renew assets or subscriptions.

Related concepts

Guidelines for Bundle Renewals

Guidelines for replacing product options on renewal and reevaluating bundle logic. (Salesforce CPQ Managed Package)

Differences Between the Legacy and Large-Scale Amendment and Renewal Services

The Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service determine some data differently, such as renewal price and quote start dates. If you switch to the large-scale

service, adjustments can be required, and an optional Visualforce component provides extra functionality. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

Permission Set Requirement

When you use the Large-Scale Amendment and Renewal Service, you must assign the Salesforce CPQ Admin permission set to the user who authorized the Salesforce CPQ calculator during package configuration. Otherwise, no users can amend or renew contracts.

To identify the user who authorized the Salesforce CPQ calculator, see the knowledge article Salesforce CPQ Authorize New Calculation Service best practice.

Service Cloud Assets Included in Quotes
When you use the Legacy Amend/Renew Service, amendment and renewal quotes include all entitlement-related assets. When you use the Large-Scale Amendment and Renewal Service, amendment and renewal quotes with service contracts created as of Spring ’21 include only assets factored into price calculations. Specifically, those assets include assets with contract line items with a Subscription Pricing value of Fixed Price. You can apply this CPQ-managed asset filter to service contracts created before Spring ’21, regardless of the service you use. Set the Subscription Pricing field on the asset’s contract line items to Fixed Price. When Subscription Pricing is set to null or Percent Of Total, the filter isn’t applied, and related amendment and renewal quotes include all entitlement-related assets.

Primary Quotes
The services handle primary quotes on amendments and renewals differently. Suppose that you create an amendment or renewal on an opportunity with several primary quotes. If you use the Legacy Amend/Renew Service, the amendment or renewal you create becomes the primary quote, and earlier quotes are marked not primary. If you use the Large-Scale Amendment and Renewal Service, you must manually reset earlier quotes as not primary, except one: the quote referenced in the Primary Quote field on the opportunity related to the contract.

Multidimensional Quoting (MDQ) Products
The services determine the renewal price differently for MDQ products when Price Editable is selected and the account's renewal pricing method is List. With the large-scale service, the renewal price reflects the price book list price (unit price). With the legacy service, the renewal price reflects the renewed subscription's list price.

Start Date on Quotes
The services determine the start date on quotes differently. The Large-Scale Amendment and Renewal service populates the field using UTC. The Legacy Amend/Renew service populates the field with the current user’s date in the user’s timezone. The difference can result in varying start dates depending on the service used and, with the legacy service, the user.

CreatedBy User
The services determine the CreatedBy user differently.

- With the Large-Scale Amendment and Renewal service, the Created By user is the Salesforce admin who manages the package settings.
- With the Legacy Amend/Renew service, the Created By User is the user who amends or renews a contract.

Bundles

- The services handle bundles differently. The package setting Re-evaluate Bundle Logic on Renewals is available only with the Legacy Amend/Renew service. If you switch to the Large-Scale Amendment and Renewal service, you must manually re-add bundles on your renewal quotes or use customizations to reevaluate bundles.
- JSAR doesn't support bundles where the parent is designated as optional.

Package Settings for Orders

If your users contract or renew from orders and you use the Large-Scale Amendment and Renewal service, select the following settings.

- In Package Settings: PoT Renewals (Contracting from Orders)
- In Order Settings: Enable Zero Quantity

Price Book ID

The legacy service populates the Price Book ID field with 18 characters and is case insensitive, whereas the large-scale service populates the field with 15 characters and is case-sensitive. If you switch from the legacy to the large-scale service, avoid issues with quotes by updating the price book ID to align it between services.

- On the amendment or renewal quote page, remove the last three characters in the Price Book ID field.
- Make your integration compatible with 15-character IDs.

Background Process for Amending Contracts

The package setting Amend Contracts in Background is available only with the Large-Scale Amendment and Renewal service.

If you upgrade your Salesforce CPQ edition in Spring '21 or later, display contract amendment job status by adding the AmendmentSave.page Apex component to the contract page layout.

Asset-Based Amendments and Renewals

Asset-based renewals aren't supported in the Large-Scale Amendment and Renewal Service. If a user creates asset-based amendments and renewals, Salesforce CPQ uses the Legacy Amend/Renew service, even if you've deselected Use Legacy Amend/Renew Service in the package settings.

Optional Functionality with Visualforce Component

With the Large-Scale Amendment and Renewal service, optional features are available. To get them, add the ContractSave Visualforce component to the Contract page layout.

- Display the status of the queued amendment or renewal job in Apex.
- Display runtime exceptions or errors stemming from unsuccessful amendments or renewals.
- Automatically refresh the contract record when the amendment or renewal process has finished.

Related concepts

Renewal of MDQ Products

Follow these guidelines when renewing your MDQ (multi-dimensional quoting) products so you can quote a new set of segments on your renewal quote. (Salesforce CPQ Managed Package)

Guidelines for Bundle Renewals

Guidelines for replacing product options on renewal and reevaluating bundle logic. (Salesforce CPQ Managed Package)

Multidimensional Quoting (MDQ) Products in Salesforce CPQ

You can show a fixed-price subscription product in the quote line editor as one quote line broken into segments. Each segment represents a unit of time (quarter, month, year, or custom) and has pricing and a

quantity independent of the line's other segments. We call these products multi-dimensional quoting (MDQ) products. They're useful if you want your sales reps to have detailed control over pricing specific units of time within one subscription. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Service Cloud for Salesforce CPQ 2.1 and later with Salesforce Spring '16 25.0.13 and later

With the Service Cloud Integration package enabled, Salesforce CPQ creates service contracts instead of contracts and contract line items instead of subscriptions.

Important: As long as the Service Cloud Integration package is enabled, Salesforce CPQ doesn't support the Contract object and the Subscription object. However, Service Cloud Integration users still require Create, Read, Update, and Delete permissions on the contract object in order for Salesforce CPQ to manage internal queries.

Feature Availability

Review these limitations for the Service Cloud for Salesforce CPQ package.

- Summary variables in price rules can't target contract line items.
- Users can't perform asset-based renewals.
- The Service Cloud for CPQ package doesn't support using the service contract's Amendment Price book ID field.
- Contract line items aren't included in search filters by default. To enable search filters for contract line items, add ContractLineItem as a picklist value on the Target Object field. Next, go to the Picklist Options section on the Target Field field and enable Product Code and Quantity for ContractLineItem. See Search Filters.

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.

- Enable Entitlements in Salesforce CPQ

Enable entitlements so you can use service contracts with a Service Cloud-integrated CPQ org. (Salesforce CPQ Managed Package)

- Guidelines for Entitlement Creation in Service Cloud for Salesforce CPQ

Percent of total contract line items use entitlements to define a relationship between the item and its covered assets. They work similarly to subscribed assets in Salesforce CPQ. (Salesforce CPQ Managed Package)

- Salesforce CPQ Contract Line Item Fields

Salesforce CPQ provides various custom-managed fields for contract line items. Contract line items store information about items that a sales rep has included in a contract. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Enable Entitlements in Salesforce CPQ

Enable entitlements so you can use service contracts with a Service Cloud-integrated CPQ org. (Salesforce CPQ Managed Package)

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.

Related information
Enable Entitlements

Guidelines for Entitlement Creation in Service Cloud for Salesforce CPQ
Percent of total contract line items use entitlements to define a relationship between the item and its covered assets. They work similarly to subscribed assets in Salesforce CPQ. (Salesforce CPQ Managed Package)

Available in: Service Cloud for Salesforce CPQ 2.1 and later with Salesforce CPQ Spring '16 and later

Entitlement Creation

When you contract a percent of total subscription, Service Cloud for Salesforce CPQ creates the following: a contract line item for the subscription and an asset for each of the subscription's covered quote lines. Entitlements work similarly to subscribed assets in Salesforce CPQ.

Salesforce CPQ	Service Cloud for Salesforce CPQ
Subscription	Contract Line Item
Entitlement	Subscribed Asset
Asset	Asset

By default, fixed-price subscriptions can't cover assets. However, you can still use entitlements to create a relationship between a fixed-price contract line item and asset. You can manually create an entitlement for your fixed-price contract line item and define a relationship between the entitlement and your desired asset. When you renew your contract, the renewal quote inherits the fixed-price subscription covering the asset.

Service Cloud for Salesforce CPQ doesn't create entitlements for standalone assets that aren't related to any percent of total subscriptions.

Entitlement Conversion

Important:

- Service Cloud for Salesforce CPQ creates an entitlement when a sales rep contracts a subscription product with an Entitlement Conversion field value of One per Quote Line or One per Unit. This process runs independently from entitlements created from entitlement templates. If a sales rep contracts a subscription product with an entitlement template and One per Quote Line or One per Unit entitlement conversion, the product creates two different entitlements.
- Users with read-only access to the Contract object can create contracts. Similarly, users with read-only access to the Entitlement object can create entitlements.

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
Fixed Price Subscription	None.	• None: No entitlement generated • 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. The entitlement's contract line item looks up to the subscription's contract line used to create the entitlement.
Percent of Total Subscription	None.	• None: Salesforce CPQ doesn't 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. Each entitlement asset field looks up to the asset used to create 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.

Salesforce CPQ Contract Line Item Fields
Salesforce CPQ provides various custom-managed fields for contract line items. Contract line items store information about items that a sales rep has included in a contract. With certain page layout and field-level security settings, some fields aren't visible or editable. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

Field	API Name	Data Type	Definition
Account	SBQQSC__Account__c	Lookup (Account)	The account that owns this subscription. This relationship is used for volume discount calculations.
Additional Discount (%)	SBQQSC__DiscountPercent__c	Percent (9, 2)	An additional discount for this line item, if expressed as a percentage.
Additional Discount (Amount)	SBQQSC__AdditionalDiscountAmount__c	Currency (12, 2)	An additional discount for this line item, if expressed as an amount.
Billing Frequency	SBQQSC__BillingFrequency__c	Picklist	Defines the billing frequency.
Billing Type	SBQQSC__BillingType__c	Picklist	Defines when the 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.
Bundled	SBQQSC__Bundled__c	Checkbox	Indicates the product on this line item is bundled (included) with another product in the quote. The price of bundled line items is 0, and their price and quantity can't be edited.
Charge Type	SBQQSC__ChargeType__c	Picklist	The product charge type. This field is a system field derived from the associated product.
Component Discounted by Package	SBQQSC__ComponentDiscountedByPackage__c	Checkbox	Excludes additional discount for this component to the parent package discount.
Component Percent of Total Scope	SBQQSC__ComponentSubscriptionScope__c	Picklist	The percent of total scope set at the component level. This field overrides the percent of total scope copied from the product option.
Contract #	SBQQSC__ContractNumber__c	Formula (Text)	The number of the associated service contract.
Credit Product ID	SBQQSC__CreditProductId__c	Formula (Text)	The ID of the upgrade credit product for this line item.
Customer Price	SBQQSC__CustomerPrice__c	Currency (12, 2)	The price paid for this line item.
Dimension Type	SBQQSC__DimensionType__c	Formula (Text)	The type of price dimension.
Discount Schedule	SBQQSC__DiscountSchedule__c	Lookup (Discount Schedule)	A discount specified in terms of percentage or amount to be taken from the product's price, using the quantity purchased or the term. Set quantity or term ranges in tiers of discount percentages. The discount is applied to the list price, and the resulting total is stored in the regular price.
Discount Schedule Type	SBQQSC__DiscountScheduleType__c	Picklist	The discount schedule type. Copied from the Type field in the associated discount schedule.
Distributor Discount	SBQQSC__DistributorDiscount__c	Percent (3, 2)	A discount to be taken on top of the partner discount.
Dynamic Option ID	SBQQSC__DynamicOptionId__c	Text (40)	The feature and dynamic option for this line item.

Field	API Name	Data Type	Definition
Has Consumption Schedules	SBQQSC__HasConsumptionSchedule__c	Checkbox	Indicates whether this line item has at least one consumption schedule.
List Price	SBQQSC__ListPrice__c	Currency (12, 2)	The list price for this line item. Corresponds to the price book entry list price associated with this line item. The price book entry can be in the standard price book or a custom price book. A client application can use this information to show whether the unit price (or sales price) of the line item differs from the price book entry list price.
Markup (%)	SBQQSC__MarkupRate__c	Percent (6, 2)	Markup for this line item, if expressed as a percentage.
Markup (Amount)	SBQQSC__MarkupAmount__c	Currency (12, 2)	Markup for this line item, if expressed as an amount.
Net Price	SBQQSC__NetPrice__c	Currency (12, 2)	The net price of this line item.
Number	SBQQSC__Number__c	Number (5, 0)	A number indicating this line item's position within its group or quote.
Option Discount	SBQQSC__OptionDiscount__c	Percent (3, 2)	If this line is for an optional SKU, this field captures any discount given to the package and extended to the option.
Option Discount (Amount)	SBQQSC__OptionDiscountAmount__c	Currency (10, 2)	The discount extended on this product because it's part of a package.
Option Level	SBQQSC__OptionLevel__c	Number (5)	Indicates nest level of this option (applies only to line items generated from options).
Option Type	SBQQSC__OptionType__c	Picklist	Indicates the option type. Copied from the related product option. Determines how quantity is calculated.
Order Product	SBQQSC__OrderProduct__c	Lookup (Order Product)	The order product from which this service contract line item was created.
Original Quantity	SBQQSC__UnitOriginalQuantity__c	Number (10, 2)	For items with calculated quantities, this field holds the original quantity entered by the customer.
Original Quote Line	SBQQSC__OriginalQuoteLine__c	Lookup (Quote Line)	The original quote line item for the subscription.
Original Unit Cost	SBQQSC__OriginalUnitCost__c	Currency (10, 2)	The original unit cost of the line item at the time of purchase, before cost schedules are applied.
Package	SBQQSC__Bundle__c	Checkbox	Indicates whether this line item represents a package and the quote therefore includes other line items.
Package Product Code	SBQQSC__PackageProductCode__c	Text (255)	A product code for the package, generated by appending the codes of selected components according to a specified pattern.
Package Product Description	SBQQSC__PackageProductDescription__c	Rich Text Area (32,000)	A product description for the package, generated by appending the descriptions of selected components according to a specified pattern.

Field	API Name	Data Type	Definition
Parent Product	SBQQSC__RequiredByProduct__c	Lookup (Product)	The parent product of this subscription.
Partner Discount	SBQQSC__PartnerDiscount__c	Percent (3, 2)	Partner discounts are applied after all automatic and discretionary discounts. The partner discount is accounted for in the partner price.
Price Dimension	SBQQSC__Dimension__c	Lookup (Price Dimension)	The price dimension associated with this line item.
Pricing Method	SBQQSC__PricingMethod__c	Picklist	Indicates how the price for this line item is calculated. **List** is calculated by subtracting the discount from the list price. **Cost** is calculated by adding the markup to the cost.
Product	SBQQSC__Product__c	Lookup (Product)	The product used to sell this subscription.
Product ID	SBQQSC__ProductId__c	Formula (Text)	The ID of the product related to this line item.
Product Name	SBQQSC__ProductName__c	Formula (Text)	The name of the product related to this line item.
Product Option	SBQQSC__ProductOption__c	Lookup (Product Option)	Product option that generated this line (if any).
Product Subscription Type	SBQQSC__ProductSubscriptionType__c	Picklist	The subscription type defined on the product record. Determines the available selections for Subscription Type on the contract line item.
Quantity	SBQQSC__Quantity__c	Number (10, 2)	The quantity of this line item purchased by a customer.
Quote Line	SBQQSC__QuoteLine__c	Lookup (Quote Line)	The quote line item that generated this line item.
Regular Price	SBQQSC__RegularPrice__c	Currency (12, 2)	The regular price of this line item.
Renewal Price	SBQQSC__RenewalPrice__c	Currency (12, 2)	The renewal price of this line item. This price overrides the default renewal price computation based on the account's Renewal Pricing field.
Renewal Product ID	SBQQSC__RenewalProductId__c	Formula (Text)	The product ID for the renewal line item.
Renewal Product Option ID	SBQQSC__RenewalProductOptionId__c	Formula (Text)	The ID of the renewal product option defined on the product option.
Renewal Product Option Product ID	SBQQSC__RenewalProductOptionProductId__c	Formula (Text)	The ID of the optional SKU defined on the renewal product option.
Renewal Product Option Sub Pricing	SBQQSC__RenewalProductOptionSubPricing__c	Formula (Text)	The subscription pricing defined on the optional SKU of the renewal product option.

Field	API Name	Data Type	Definition
Renewal Quantity	SBQQSC__RenewalQuantity__c	Number(10, 2)	The renewal quantity of the line item.
Renewal Uplift (%)	SBQQSC__RenewalUpliftRate__c	Percent(8, 3)	The rate of renewal price increase.
Renewed Date	SBQQSC__RenewedDate__c	Date	The date the line item was renewed, as determined by date the renewal opportunity was contracted. If this field is blank, the line item hasn't been renewed.
Required By ID	SBQQSC__RequiredById__c	Text(18)	The ID of the quote line item or contract line item that requires the field.
Revised Line Item	SBQQSC__RevisedSubscription__c	Lookup (Contract Line Item)	Lookup to the revised contract line item.
Root ID	SBQQSC__RootId__c	Text (18) (External ID)	The ID of the subscription or asset at the root of the bundle that contains this subscription.
Segment End Date	SBQQSC__SegmentEndDate__c	Date	For MDQ products, the end date from the original segment's quote line item.
Segment Index	SBQQSC__SegmentIndex__c	Number(2, 0)	For MDQ products, an index representing this quote line item's position in the segment table.
Segment Key	SBQQSC__SegmentKey__c	Text(36)	For MDQ products, a shared key used to group multi-dimensional quote line items.
Segment Label	SBQQSC__SegmentLabel__c	Text(25)	For MDQ products, the column header label (for example, "Year 1") associated with this line item.
Segment Quantity	SBQQSC__SegmentQuantity__c	Number(10, 2)	For MDQ Products, the quantity corresponding to the original segment's quote line item.
Segment Start Date	SBQQSC__SegmentStartDate__c	Date	For MDQ products, the start date from the original segment's quote line item.
Segment Uplift	SBQQSC__SegmentUplift__c	Percent(7, 2)	For MDQ products, the Uplift from the original segment's quote line item.
Segment Uplift (Amount)	SBQQSC__SegmentUpliftAmount__c	Currency (10, 2)	For MDQ products, the Uplift Amount from the original segment's quote line item.
Special Price	SBQQSC__SpecialPrice__c	Currency (12, 2)	A special price for this line item.
Start Date	SBQQSC__StartDate__c	Date (Date)	The first day the line item is in effect.
Subscription End Date	SBQQSC__SubscriptionEndDate__c	Date	Matches the quote line item end date by default. If blank, it matches the contract end date.
Subscription Start Date	SBQQSC__SubscriptionStartDate__c	Date	Matches the quote line item start date by default. If blank, it matches the contract start date.
Subscription Type	SBQQSC__SubscriptionType__c	Picklist	Indicates the subscription type as allowed by the Product Subscription Type value. Determines the contract's pricing.

Field	API Name	Data Type	Definition
Term Discount Schedule	SBQQSC__TermDiscountSchedule__c	Lookup (Discount Schedule)	A discount schedule based on subscription term. **Group** applies the discount rate for the group term. **Quote** applies the discount rate for the entire quote term, regardless of the different terms in your groups.
Terminated Date	SBQQSC__TerminatedDate__c	Date	The date when the line item is terminated. When a covered asset is upgraded, this field is populated automatically.
Unit Cost	SBQQSC__UnitCost__c	Currency (12, 2)	The unit cost of this line item.

Amend Your Contracts and Assets in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

For a deep dive into amendments and renewals, watch this video:

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 quote lines for all of the contract's assets and active subscription products. Expired subscriptions (subscriptions with end dates before the amendment quote's start date) aren't included. You can also add new quote lines to the amendment quote.

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.

Note: Certain types of changes, called "pricing amendments," can create unexpected pricing on future quotes. We don't recommend doing the following on amendment quotes: modifying any of the standard price fields on the quote line; changing discounts on the quote line; changing dates on purchased quote lines; adding new lines with an end date different from the contract's end date.

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.

Renewal model	**Use case**	**Actions**	**Results**
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.

Renewal model	**Use case**	**Actions**	**Results**
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. • The amendment opportunity reflects the product and quantity differences between your original quote and your amendment quote.

- Salesforce CPQ Amendment Fields and Settings

Salesforce CPQ provides several fields that let you automate and customize the amendment process. You can find these fields on your accounts and contracts. (Salesforce CPQ Managed Package)

- Amend Contracts in Salesforce CPQ

Amend your contracts when a customer wants to add new products or change products that you've quoted or sold. (Salesforce CPQ Managed Package)

- Amend a Contract from an Opportunity

When a customer wants to add products or change products that you've quoted or sold, first create an opportunity for the amendment. Then you can create the amended contract. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Guidelines for Amending Subscription Start Dates

Amendment quotes' start dates depend on the contract and require careful consideration. Learn how to control start dates so that amendments are correctly calculated. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Amendment Processes in Salesforce CPQ

Salesforce CPQ offers several ways to manage the subscriptions and assets you're amending. (Salesforce CPQ Managed Package)

Salesforce CPQ Amendment Fields and Settings

Salesforce CPQ provides several fields that let you automate and customize the amendment process. You can find these fields on your accounts and contracts. (Salesforce CPQ Managed Package)

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 doesn't provide a value for your amendment quote's end date.

Preserve Bundle Structure	Bundles on the amendment quote inherit their configuration from the amended quote. If you don't enable this field, your bundles appear on the amendment quote as standalone quote lines and can't be reconfigured. If the bundle structure isn't preserved, any assets not included in the scope of Percent of Total subscriptions are also left off the amendment quote. We recommend keeping this field enabled. You can also set Preserve Bundle Structure in Salesforce CPQ package settings or on the contract. Accounts inherit the Preserve Bundle Structure value from Salesforce CPQ line editor package settings. New contracts inherit the Preserve Bundle Structure value of its parent account. We recommend selecting Preserve Bundle Structure in package settings to ensure that all new accounts and contracts have the Preserve Bundle Structure selected. The value of Preserve Bundle Structure set at any level affects related records only at the time they're created. For example, selecting Preserve Bundle Setting on an account doesn't apply the setting to that account's current contracts. In Salesforce CPQ Spring '19 and later, a contract's Preserve Bundle Structure field must be selected before users can amend that contract. To update Preserve Bundle Structure on the current contracts in your Salesforce org, we recommend using a Process Builder or Workflow rule.
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 can 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.

Subscriptions and Renewals Package Settings

Bypass Preserve Bundle Structure	In Salesforce CPQ Summer '20 and later, the Bypass Preserve Bundle Structure setting removes the requirement to keep the original bundle structure on amendments. When you select this setting on the Subscriptions and Renewals tab in package settings, enabling the Preserve Bundle Structure setting on contracts is no longer required. Even though this setting increases flexibility when creating amendment quotes, we recommend that you continue using the Preserve Bundle Structure setting on amendments. Bypassing the preserve bundle structure requirement can introduce unexpected price changes or unforeseen product and price rule behavior changes.
Background Processing of Contract Amendments	To let users continue working in Salesforce while a contract amendment is in progress, use the **Amend Contracts in Background** option under Subscriptions and Renewals in Setup. If **Use Legacy Amend/Renew Service** is selected, deselect it to use the Salesforce CPQ Large-Scale Amendment and Renewal service instead.

Related concepts

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. (Salesforce CPQ Managed Package)

Amend Contracts in Salesforce CPQ

Amend your contracts when a customer wants to add new products or change products that you've quoted or sold. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

Before you amend a contract, review these considerations.

- Make sure that your account has a contract-based renewal model.
- 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.
- As of Salesforce CPQ Spring '19, for Legacy Amendment and Renewal Services, make sure that your contract's Preserve Bundle Structure field is selected. Otherwise, you can't amend that contract from the contract record or its related opportunity. We recommend selecting this field in earlier Salesforce CPQ versions as well. When this field is unselected in versions before Spring '19, Salesforce CPQ ignores the configuration of amended bundles and converts them to standalone quote lines on the amendment quote. It can result in validation errors, unwanted price changes, and ignored product or price rules on the amendment quote.

- Certain types of changes called “pricing amendments” can create unexpected pricing on future quotes. We don’t recommend making these changes on amendment quotes: modifying standard price fields on the quote line; changing discounts on the quote line; or changing dates on amendment quote lines when the Updated Subscription field is populated.
- When cross order = false and a product has a discount schedule, we recommend creating another quote line to sell more of the same item, rather than amending a quote line. This way, you reduce individual line items without interference from the discount schedule.

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. Assets that affect a quote’s pricing are pulled into amendment quotes, such as when a Percent of Total subscription covers them. Assets that aren’t part of bundles are pulled into amendment quotes when the preserve bundle structure package setting is enabled or when the option for preserving the bundle on the amended contract is selected.
3. Adjust the quantity of the quote lines from your original quote, apply discounts, 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.

   When the amendment quote’s start date is equal to or after the contract’s start date, the prices on your amendment quote lines are based on the contracted price. The prices of the net new quote lines are based on the listed price.

   Salesforce CPQ doesn’t support the amendment subscription quote line’s end date.

   Salesforce CPQ doesn’t support non-integer quantity amendments.

   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.

Related concepts

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. (Salesforce CPQ Managed Package)

Amend a Contract from an Opportunity

When a customer wants to add products or change products that you’ve quoted or sold, first create an opportunity for the amendment. Then you can create the amended contract. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

1. Create an opportunity for the amendment.
   The opportunity can't be related to an existing contract.
2. From the opportunity, click **Amend Contract**.
   Salesforce CPQ shows the Existing Contracts page, which shows your opportunity's amendable active contracts for standard contracts and evergreen contracts. Remember, when you contract an opportunity or order, Salesforce CPQ splits renewable subscriptions and evergreen subscriptions into separate contracts.
3. Choose a contract, and then click **Select**.
4. Review your subscriptions, and then click **Amend**.
   Salesforce CPQ creates an amendment quote containing all the subscriptions and assets in the contract, including subscriptions and assets associated with previous contract amendments. The quote's start date is the opportunity close date. Its end date is the contract end date.
5. Adjust the quantity of the quote lines from your original quote or add products, and then save your changes.
   - You can amend an asset's quantity only if the asset amendment behavior of the related product record is set to Allow Refund.
   - Salesforce CPQ calculates product quantity and price on your amendment opportunity based on the difference between the original quote and the amendment quote. On the amendment opportunity, the Amended Contract and Primary Quote fields are updated with links to the contract you amended and your original quote.

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later

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.

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**. 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.

You have a contract with a start date of 01/01/2018, an end date of 12/31/2018, and several subscription products.

Table 59: 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 60: 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 61: 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

Related concepts

Salesforce CPQ Amendment Fields and Settings

Salesforce CPQ provides several fields that let you automate and customize the amendment process. You can find these fields on your accounts and contracts. (Salesforce CPQ Managed Package)

Guidelines for Amending Subscription Start Dates

Amendment quotes' start dates depend on the contract and require careful consideration. Learn how to control start dates so that amendments are correctly calculated. (Salesforce CPQ Managed Package)

Determine the Quote Start Date on amendment quotes

- Define a start date for amendment quotes created on a contract.
  - If you leave the Contract's Amendment Start Date blank, the amendment quote starts on the day you perform the amendment.
    - If the date you perform the amendment is before the Start Date of the Contract, the amendment quote uses the Start Date of the Contract.
  - If you populate this field, the amendment quote starts on the day you chose on the Contract.
    - If the date you chose is before the Start Date of the Contract, the amendment quote shows an error.

Determine the Quote Line Start Date on amendment quotes

- If the Start Date of the original Subscription record on the Contract is:
  - Equal to or before the Quote Start Date on the amendment quote, the Quote Start Date populates as the Quote Line Start Date. This ensures that the term is correctly shortened.
    - Amendment services leave this field null on creation so that it automatically inherits its value from the quote.
  - After the Quote's Start Date on the amendment quote, the Start Date from the original Subscription record populates as the Quote Line Start Date. This ensures that the term is not incorrectly extended.
    - Amendment services populate the Quote Line's Start Date field with the Start Date from the original Subscription record.
- If you use Quote Groups, the Quote Line inherits the start date of the quote group.
- If the Quote Line Start Date is before that of an existing amendment Subscription whose quantity change isn't canceled by another amendment, the creation of the amendment quote is blocked.
- If the customer changes the Quote Line Start Date on the amendment quote to a date before that of an existing amendment subscription whose quantity change isn't canceled by another amendment, the Save function is blocked.
- If you must change the Quote Line Start Date to be before the Start Date of the existing amendment, fully cancel the amended subscription. Then, replace it with appropriate subscription change.

Note: As of Winter '21, the backdated amendment restriction was updated to allow add-on products or subscriptions on amendment quotes. Creating amendments for existing subscriptions with start dates before existing amendments' start dates is still blocked.

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. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

Ensure that your account has an asset-based renewal method.

1. Click **Amend Assets** on your account.
   Salesforce CPQ displays the Asset Selection page. This page shows the assets that you created when you contracted the opportunities or orders related to the primary quotes on your account. If assets were previously amended, then the net quantity of those assets is reflected on the page.
2. Select the assets that 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.
3. Amend your quote as needed, and then save your changes.

   You can add new products, increase quote line quantities, or decrease quote line quantities. If the asset amendment behavior of the product you're amending is set to Allow Refund, you can reduce the refund's quantity to zero. You can't 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.

   Amendment assets are refunded at full price regardless of the discounted net total from the original quote. Discounts don't transfer to the assets on amendment quotes.

Related concepts

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce Classic
Available in: **All** CPQ Editions

1. In Salesforce Classic, 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.
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 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 in Salesforce CPQ

Salesforce CPQ offers several ways to manage the subscriptions and assets you're amending. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

- Amending MDQ Products

Amend a contract containing multidimensional quoting (MDQ) products. This process is useful if you want to change a multiple-year contract partway through its term. (Salesforce CPQ Managed Package)

- Terminating Subscriptions in Salesforce CPQ

Remove a subscription when making an amendment. (Salesforce CPQ Managed Package)

- Asset Upgrades

The asset upgrade and downgrade features let your sales reps replace an asset with a different asset from within the quote line editor. This feature is useful for processing upgrades. (Salesforce CPQ Managed Package)

- Guidelines for Amending Contracts

When you're ready to amend a contract, review our guidelines. (Salesforce CPQ Managed Package)

Amending MDQ Products

Amend a contract containing multidimensional quoting (MDQ) products. This process is useful if you want to change a multiple-year contract partway through its term. (Salesforce CPQ Managed Package)

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.

- Salesforce CPQ doesn't support amending multiple MDQ subscriptions that have different start dates. In this case, each MDQ subscription's amended quote line start date equals the quote or quote line group's start date.
- Salesforce CPQ doesn't support amending multiple MDQ subscriptions that have different end dates. If you try to amend such subscriptions, the end date is recalculated to match the earliest end date among the subscriptions.
- Segment quantities on 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.
- If you add an MDQ product to an amendment quote, the first segment's quantity is correct. However, the quantity shown for each subsequent segment is incorrect. It reflects the total quantity instead of the change compared to the previous segment.

Related concepts

Guidelines for MDQ Products
Consider a few points before you create MDQ products. (Salesforce CPQ Managed Package)

Related reference

Salesforce CPQ Subscription Fields
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 their field values from their subscription product quote line items or order products. (Salesforce CPQ Managed Package)

Terminating Subscriptions in Salesforce CPQ
Remove a subscription when making an amendment. (Salesforce CPQ Managed Package)

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.

Asset Upgrades
The asset upgrade and downgrade features let your sales reps replace an asset with a different asset from within the quote line editor. This feature is useful for processing upgrades. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

To enable asset upgrades, select **Enable Asset Upgrades** in the Salesforce CPQ Line Editor package settings. Salesforce CPQ will add the Upgrade Asset button to the quote line editor.

We recommend creating a product that represents the price difference between the original product and the upgrade. For example, your company sells a Basic Network Package for $10,000, an Enhanced Network Package for $15,000, and a Premium Network Package for $30,000. For this case, we recommend creating three upgrade products to represent the upgrade differences between each level.

Product Name	**Price**
Basic to Enhanced	$5000
Basic to Premium	$20,000
Enhanced to Premium	$15,000

If your sales rep needed to upgrade from a basic to an enhanced subscription, they would amend the quote to remove the basic subscription and add the Basic to Enhanced upgrade product to represent the price difference.

Your upgrade product uses the Upgrade Source junction object to represent the connection between the source product and the upgrade product. For example, on your Basic to Enhanced upgrade product, you would create an upgrade source object with a Source Product field set to Basic Network Package. Your upgrade product's Upgrade Target field defines the product your sales rep upgrades into. In this case, your Upgrade Target field should look up to the Enhanced Network Package.

When your sales rep contracts an upgrade product with an Upgrade Source object and Upgrade Target value, Salesforce CPQ replaces the upgrade product asset with the upgrade target asset in your account's Assets related list. In this case, Salesforce CPQ replaces the Basic to Enhanced asset with an Enhanced Network Package asset.

Asset Downgrades

The asset downgrade process functions similarly to the upgrade process. To configure downgrade products, you would also create products that represent the price difference. You can then follow the same process for configuring the Upgrade Source object and the Upgrade Target field.

Product Name	
Enhanced to Basic	-$5000
Premium to Basic	-$20000
Premium to Enhanced	-$15000

- 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. (Salesforce CPQ Managed Package)

- Upgrade Salesforce 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Upgrade Assets

Replace an asset with a different asset from within the quote line editor. This feature is useful for processing upgrades. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

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**.

   On amendment quotes, the Upgrade Assets page shows only subscribed assets covered by a percent of total subscription product.
7. Select the checkbox next to the Brone Widget, and then click **Select**.
8. On the page with your available upgrades, select **Bronze-to-Silver Upgrade**, and then click **Select**.
9. 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.
10. 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.
11. Save the quote and contract your amendment.
12. Navigate to your account and look at the Assets related list. It shows the following.

    - A quantity of 5 for your Bronze Widgets. This quantity represents the original purchase.
    - A quantity of 3 for your Silver Widgets. This quantity represents the upgraded widgets.
    - Another Bronze Widget listing with a quantity of -3. This quantity represents 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 Salesforce 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. (Salesforce CPQ Managed Package)

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.

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
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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '16 and later

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 an 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 has the source product bundle. To upgrade a bundle, you 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 if the upgrade bundle doesn't require configuration.

   If the upgrade bundle requires configuration, Salesforce CPQ opens the quote line editor so you can reconfigure the bundle so the attributes' values are inherited.
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 must 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.

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'll 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 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.

Upgrade Assets

Replace an asset with a different asset from within the quote line editor. This feature is useful for processing upgrades. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Note: When upgrading assets, only asset upgrades on amendment quotes are supported.

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.

Related concepts

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. (Salesforce CPQ Managed Package)

Guidelines for Amending Contracts

When you're ready to amend a contract, review our guidelines. (Salesforce CPQ Managed Package)

New Subscription Quote Lines	If you add new subscription quote lines to an amendment quote and then contract the opportunity or order, the new subscriptions are also added to the contract you amended. A different contract isn't created for your new subscriptions.
Additional Discounts on Quotes and Quote Lines	Quote-level and group-level additional discounts don't carry over to amendment quotes. Quote line additional discounts do carry over to amendment quote lines. If a percent of total product's covered asset has an amount-based additional discount, the covered asset's amendment quote lines have negative total values on amendment quotes. If you use amendments, we recommend not applying amount-based additional

	discounts to any quote line that would become a covered asset.
Amended Opportunities	Salesforce CPQ supports upgrading an asset and then reducing the upgraded asset's quantity as part of one amendment only for amended opportunities.
Amending Your Contracts and Assets	When manually creating an amendment quote, you can amend subscriptions from expired contracts. When you're amending a subscription from the quote line editor, all subscriptions are shown, regardless of the state of the contract objects on that account.
Discount Amounts	For products with a slab discount schedule or a block pricing method, the discount amount is converted to a discount percentage on amendments.

Renew Your Contracts and Assets in Salesforce CPQ

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. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

For a deep dive into amendments and renewals, watch this video:

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.

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 covered assets from your contract.

Renewal model	Use case	Actions	Results
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 Pricing Method Data Flows

The account's Renewal Pricing Method field controls how Salesforce CPQ calculates the list unit price of renewed subscription quote lines on renewal quotes. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Renew Multiple Contracts Through List Views

Create a list view that shows every contract on an account, and use it to review multiple contracts simultaneously. Because the contracts related list shows up to 100 contracts at a time, list view renewals are useful when your account contains over 100 contracts. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- 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. (Salesforce CPQ Managed Package)

- Guidelines for Renewed Products

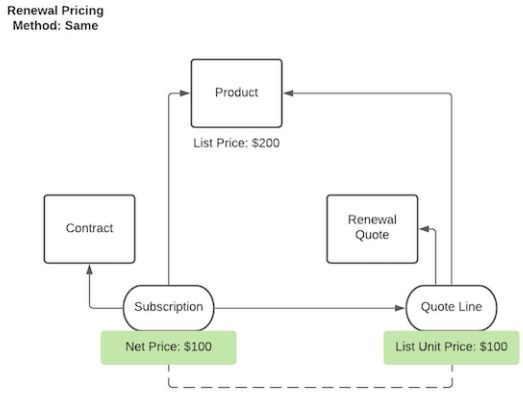
A product’s type determines how it moves through the renewal process. Use key renewal fields on your product records to customize this process. (Salesforce CPQ Managed Package)

Renewal Pricing Method Data Flows

The account's Renewal Pricing Method field controls how Salesforce CPQ calculates the list unit price of renewed subscription quote lines on renewal quotes. (Salesforce CPQ Managed Package)

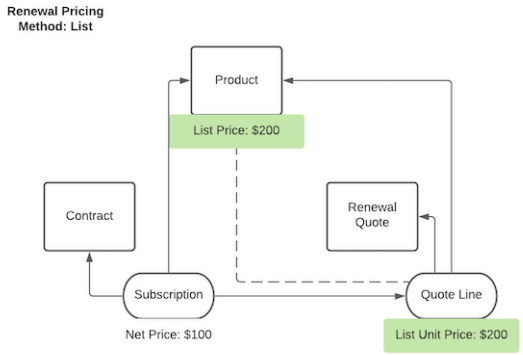
The Renewal Pricing Method field has three possible values. When you change the value, new subscription renewal quote lines are calculated using the new method. Existing subscription renewal quote lines aren't changed.

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.



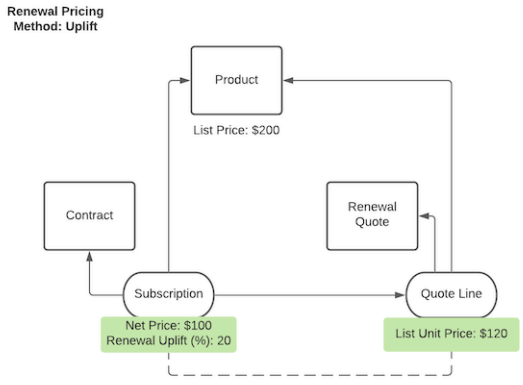
List

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.



Important: In Summer '19, we changed how Salesforce CPQ calculates list prices for renewals where the account's renewal pricing method is Same or Uplift. Salesforce CPQ uses the subscription's list price to calculate the renewal quote line's list price. Previously, Salesforce CPQ used the product's price book entry price unless the product had an active Price Editable field. If an admin had changed the price book entry price before the sales rep renewed the subscription, the resulting renewal quote line was inaccurate.

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. (Salesforce CPQ Managed Package)

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.

Important: In Summer '19, we changed how Salesforce CPQ calculates list prices for renewals where the account's renewal pricing method is Same or Uplift. Salesforce CPQ uses the subscription's list price to calculate the renewal quote line's list price. Previously, Salesforce CPQ used the product's price book entry price unless the product had an active Price Editable field. If an admin had changed the price book entry price before the sales rep renewed the subscription, the resulting renewal quote line would be inaccurate.

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 standalone quote lines and can't be reconfigured. If the bundle structure isn't preserved, any assets not included in the scope of Percent of Total subscriptions are also left off the renewal quote.

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 records 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

Discount Schedule	This field inherits the subscription quote line's discount schedule. When you renew your subscription with a Renewal Product value, the renewal quote line inherits the subscription's discount schedule rather than any discount schedule associated to the original product. This distinction is important if you allow your sales reps to change the quote line's discount schedule.
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. If your account uses Uplift renewal pricing, the uplift is applied directly to the Renewal Price field.

Related concepts

Subscription Guidelines for Salesforce CPQ

Subscription records contain information about subscription products on opportunities or orders that you've contracted. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: **All** Salesforce CPQ Editions

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.

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. (Salesforce CPQ Managed Package)

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.

Renewing multiple contracts from an account is available in Lightning Experience as of Salesforce CPQ Summer '19.

Note:

When Large-Scale Amendment and Renewal is enabled and you renew a contract, renewed child subscriptions from a contract other than the parent subscription contract aren't automatically included on the renewed parent contract. To include these child subscriptions, enable Legacy Amendment and Renewal Services , or manually clone the child subscription on the parent subscription.

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.

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

Renew Multiple Contracts Through List Views

Create a list view that shows every contract on an account, and use it to review multiple contracts simultaneously. Because the contracts related list shows up to 100 contracts at a time, list view renewals are useful when your account contains over 100 contracts. (Salesforce CPQ Managed Package)

Available in: All Salesforce CPQ Editions

1. Add the Renew Contracts button to the List View Search Layout for the contract record.
   a) From Setup, in the Quick Find box, enter `Contracts`, and then click **Search Layouts**.
   b) On the Contracts List View row, click **Edit**.
   c) Add Renew Contracts to Selected Buttons.
2. On the Contracts tab, create a list view that filters contracts by an account.
3. Return to the Contracts list page and enable your filter.
4. Select the contracts you want to renew and click **Renew Contracts**.

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. (Salesforce CPQ Managed Package)

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.

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 62: 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.

Related concepts

Salesforce CPQ Opportunity Contracting Methods

You can adjust quote fields to control how Salesforce CPQ distributes subscription products on your contracts. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

Available in: Salesforce CPQ Summer '15 and later

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.

When using asset-based renewals, Salesforce CPQ always uses the standard price book to price the renewed quote lines. This process differs from contract-based renewals, where you can define a different price book for renewal pricing.

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.

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 63: 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 64: 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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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.

- When you select **Combine Subscription Quantities** on the contract, subscriptions roll up on legacy amendment quotes only, not on large-scale amendment quotes.
- Salesforce CPQ doesn't preserve bundle structure when Combine Subscription Quantities is active and the same subscription product exists within multiple bundle levels.
- We recommend that users don't combine differently priced subscriptions of the same product while using Same or Uplift renewal pricing methods. On renewal, Salesforce CPQ ignores the individual pricing and uplift of each subscription and instead uses the first subscription's pricing and uplift. For example, combining 4 subscriptions' renewal price of 15% and 6 subscriptions' renewal price of 20%, Salesforce CPQ applies a renewal price of 15% for all 10 renewed subscriptions.

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. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

- Guidelines for Bundle Renewals

Guidelines for replacing product options on renewal and reevaluating bundle logic. (Salesforce CPQ Managed Package)

- Renewal of MDQ Products

Follow these guidelines when renewing your MDQ (multi-dimensional quoting) products so you can quote a new set of segments on your renewal quote. (Salesforce CPQ Managed Package)

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. (Salesforce CPQ Managed Package)

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 licenses and the system performance management license.

Note:

- 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 renewing a Percent of Total subscription product into a fixed-price subscription product.

Ordering Percent of Total Products from Renewal Quotes

Renewing a contract made from an order works differently depending on your version of Salesforce CPQ.

- In Spring '19 and earlier, Percent of Total subscriptions became Fixed Price subscriptions upon contract renewal.
- In Summer '19 and later, Percent of Total subscriptions retain relationships with their covered assets on the renewal quote. This allows you to continue updating the Percent of Total subscription with new covered products for the subscription's entire life cycle. Also, orders now show zero-quantity order products for covered assets from renewal quotes, so you no longer have to return to the initial quote for review.
  - This feature is active by default for new Salesforce CPQ Summer '19 users.
  - To enable this feature, in your Order Settings, select **Enable Zero Quantity Orders**. In Salesforce CPQ Subscriptions and Renewals settings, select **PoT Renewals (Contracting from Orders)**.

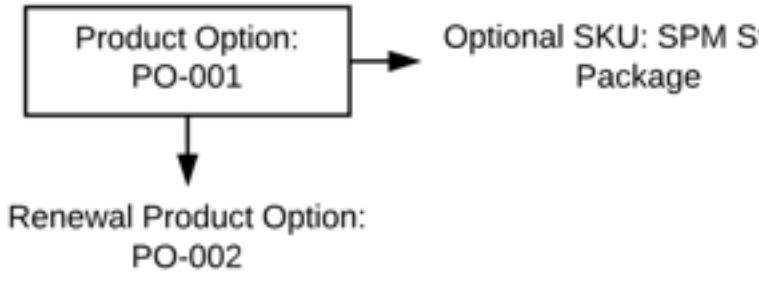
Guidelines for Bundle Renewals

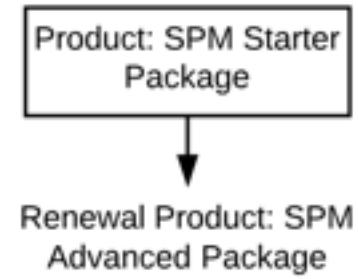
Guidelines for replacing product options on renewal and reevaluating bundle logic. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

Replacement of Product Options on Renewal	To replace a product option on renewal, 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. 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. The diagram shows how you can set this up. **Important:** Always use the renewal product option when renewing a product that's part of a bundle.

Otherwise, Salesforce CPQ changes only the product on renewal, which can cause errors when you reconfigure your renewed bundle.





Reevaluate Bundle Logic on Renewals Setting (Available Only in Legacy Amend and Renew Service)

Select the Subscriptions and Renewals package setting Reevaluate Bundle Logic on Renewal to automatically reconfigure a bundle on 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.

The setting Reevaluate Bundle Logic on Renewal is deselected by default. You can leave it deselected when you renew a quote whose renewal bundle configuration has changed, because the new bundle has different configuration logic. When the setting is selected, new options to are added to the bundle automatically, which prevents you from manually reconfiguring the bundle as needed.

If you switch to the Large-Scale Amendment and Renewal service, you must manually readd bundles on your renewal quotes or use customizations to reevaluate bundles.

Note: Salesforce CPQ doesn’t support the reparenting of a child asset in a bundle to a different parent on renewal. Also, Salesforce CPQ doesn’t support renewing or replacing child products with parent products in a bundle. For example, here’s a renewal of a child option to parent bundle.

Original bundle:

- Parent A
  - Child B
  - Child C

Renewal bundle

- Parent D
  - Child E

Setting the renewal product option to Child E on Child C's product option record is supported.

Setting the renewal product option to Parent D on Child B's product option record isn't supported.

Related concepts

Things to Know About Amendment and Renewal Services
The Large-Scale Amendment and Renewal service supports amendment and renewal actions for contracts with up to 2,000 related records. Some differences exist between the Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service. (Salesforce CPQ Managed Package)

Guidelines for Amendment and Renewal Services
Learn the guidelines to determine when to use the Large-Scale Amendment and Renewal service or the Legacy Amend/Renew service. (Salesforce CPQ Managed Package)

Differences Between the Legacy and Large-Scale Amendment and Renewal Services
The Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service determine some data differently, such as renewal price and quote start dates. If you switch to the large-scale service, adjustments can be required, and an optional Visualforce component provides extra functionality. (Salesforce CPQ Managed Package)

Renewal of MDQ Products

Follow these guidelines when renewing your MDQ (multi-dimensional quoting) products so you can quote a new set of segments on your renewal quote. (Salesforce CPQ Managed Package)

Available in: **All** CPQ Editions

- Renewing a non-MDQ product into an MDQ product isn't supported.
- Salesforce CPQ doesn't support renewing multiple MDQ subscriptions that have different start dates. In this case, each MDQ subscription's renewal quote line start date equals the quote or quote line group's start date.
- 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.
- If you write automations that affect a renewal quote's subscription term or end date, be sure to set the renewal behavior to De-segmented.
- 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 or 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.
- When you renew MDQ products, if the terms on the original and renewal quotes are different, adjust the renewal term on the contract before the renewal quote is generated. Adjusting the renewal term in the quote line editor after the quote is generated sometimes results in an unexpected uplift pricing. If the renewal term is greater than the original contract term, additional discounts from the first contract segments aren't carried over to the renewed quote segments.
- When a product is renewed, there's a lookup to the subscription product from which it was renewed on the quote line. However, when you desegment a renewed MDQ product, this lookup (and subsequently the pricing related to it) is based on the first segment from the original quote, not the last.
- Renewing a previously terminated MDQ segment isn't supported by the Legacy Amend/Renew service. If this scenario is required by your business, use JSAR. If you're using the Legacy Amend/Renew service, renewing a previously terminated MDQ segment results in incorrect quote lines.

  If you're using JSAR, you can renew an MDQ with a terminated segment if the last segment isn't terminated (or in the active state). We use the last segment as the basis for pricing the renewal MDQ segments.

  If the TerminatedDate__c field is populated, a subscription or segment is considered terminated.

Related concepts

Differences Between the Legacy and Large-Scale Amendment and Renewal Services
The Large-Scale Amendment and Renewal service and the Legacy Amend/Renew service determine some data differently, such as renewal price and quote start dates. If you switch to the large-scale service, adjustments can be required, and an optional Visualforce component provides extra functionality. (Salesforce CPQ Managed Package)

Printable Tip Sheets & User Guides — For Salesforce CPQ

Printable implementation guides for Salesforce Billing admins. (Salesforce CPQ Managed Package)

Important:

The Salesforce CPQ managed package continues to be available for existing customers, however, there is no longer any new feature development. We will continue to provide support and services for the duration of your contract. You can also add more user licenses to your Salesforce org during your current subscription term and renew existing subscriptions.

For a more comprehensive and robust CPQ solution, we recommend exploring Revenue Cloud.

Salesforce CPQ Printed Guides

These documents are for admins and partners.

Proration

- Salesforce CPQ and Billing Proration Implementation Guide

Contracts

- Salesforce CPQ Contract Configuration Tip Sheet

Sales Contracts Vs. Service Contracts

- Sales and Service Contracts for Salesforce CPQ Tip Sheet

Amendments

- Salesforce CPQ Asset Amendment Tip Sheet