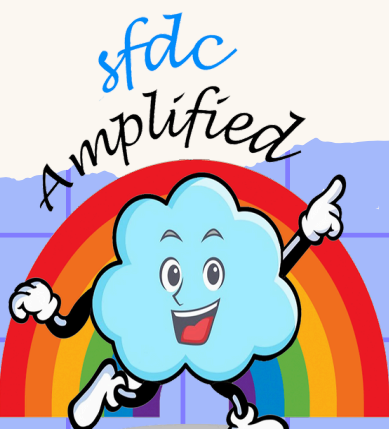


By Smriti Sharan

Configuration Type and Configuration Event Salesforce CPQ



Configuration Type and Configuration Event are often asked in interviews but we get confused because of small changes in UI. Let's cover it clearly.



Configuration Type

Configuration Type determines how Salesforce CPQ handles the configuration of bundle products.

Configuration Event

The Configuration Event defines the specific scenario or trigger when the configuration page for a product bundle is launched.

Configuration Type ⓘ

Allowed ▼

--None--

Required

✓ Allowed

Disabled

Configuration Event ⓘ

Edit ▼

--None--

Always

Add

✓ Edit



Configuration Type : Required

Configuration Event : Always



Product

T-Mobile Family Plan Bundle

▼ Salesforce CPQ Configuration

Configuration Type ⓘ

Required

Configuration Event ⓘ

Always



Go to Quote -> Add Product->Select

Q-00018 **Product Selection** 1

<input type="checkbox"/>	PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input checked="" type="checkbox"/>		T-Mobile Family Plan Bundle	Bundles		\$150.00

Immediately you will see Product Options and Features

Q-00018 **Configure Products**

T-Mobile Family Plan Bundle

Phone Plan					
	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00		T-Mobile Phone Plan		\$70.00

International Calling					
	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00		T-Mobile International Calling		\$15.00



Select the Product Option and click save

Q-00018 **Configure Products** ▼ Apply Rules Cancel Save

T-Mobile Family Plan Bundle

Phone Plan

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00		T-Mobile Phone Plan		\$70.00

International Calling

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00		T-Mobile International Calling		\$15.00

Device Protection

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00		T-Mobile Device Protection		\$10.00



You will still see the Wrench icon. It means you can still do the changes

Q-00018
Edit Quote

Add Products Add Group Quick Save Calculate Cancel Save

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
		T-Mobile Family Plan Bundle	1.00	\$150.00		\$150.00	\$150.00
		T-Mobile Phone Plan	1.00	\$70.00		\$70.00	\$70.00
SUBTOTAL:							\$220.00
QUOTE TOTAL:							\$220.00



Configuration Type : Allowed

Configuration Event : Add



Product

T-Mobile Family Plan Bundle

▼ Salesforce CPQ Configuration

Configuration Type ⓘ

Allowed

Configuration Event ⓘ

Add



Go to Quote -> Add Product->Select

Q-00018 **Product Selection** 1

<input type="checkbox"/>	PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input checked="" type="checkbox"/>		T-Mobile Family Plan Bundle	Bundles		\$150.00

Immediately you will see Product Options and Features

Q-00018 **Configure Products**

T-Mobile Family Plan Bundle

Phone Plan					
	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00		T-Mobile Phone Plan		\$70.00

International Calling					
	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00		T-Mobile International Calling		\$15.00



Select the Product Option and click save



Q-00018

Configure Products



Apply Rules

Cancel

Save

T-Mobile Family Plan Bundle

Phone Plan

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00		T-Mobile Phone Plan		\$70.00

International Calling

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00		T-Mobile International Calling		\$15.00

Device Protection

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00		T-Mobile Device Protection		\$10.00



You will **NOT** see the Wrench icon. It means you can **NOT** do the changes after adding the options

Q-00018
Edit Quote

Add Products ▼ Add Group Quick Save Calculate Cancel Save

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1		T-Mobile Family Plan Bundle	1.00	\$150.00		\$150.00	\$150.00
2		T-Mobile Phone Plan	1.00	\$70.00		\$70.00	\$70.00
						SUBTOTAL:	\$220.00
							QUOTE TOTAL: \$220.00



Configuration Type : Allowed

Configuration Event : Edit

▼ Salesforce CPQ Configuration

Configuration Type ⓘ

Allowed

Configuration Event ⓘ

Edit



Go to Quote -> Add Product->Select

Q-00018 Product Selection

family

1

Select Select & Add More Cancel

<input type="checkbox"/>	PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input checked="" type="checkbox"/>		T-Mobile Family Plan Bundle	Bundles		\$150.00

You will not see Immediately Product Options and Features. You need to click on Wrench Icon

Q-00018 Edit Quote

Add Products Add Group Quick Save Calculate Cancel Save

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
L		T-Mobile Family Plan Bundle	1.00	\$150.00		\$150.00	\$150.00
SUBTOTAL:							\$150.00
QUOTE TOTAL:							\$150.00

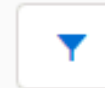


Add the Option



Q-00018

Configure Products



Apply Rules

Cancel

Save

T-Mobile Family Plan Bundle

Phone Plan				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00		T-Mobile Phone Plan		\$70.00

International Calling				
QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00		T-Mobile International Calling		\$15.00



You will still see the wrench icon after adding it. It means you can still edit

The screenshot shows the Salesforce CPQ interface for editing a quote (Q-00018). The top navigation bar includes 'Salesforce CPQ' and various menu items like 'Home', 'Accounts', 'Opportunities', 'Quotes', 'Solution Groups', 'Discount Schedules', 'Quote Templates', 'Products', and 'More'. Below the navigation, the 'Edit Quote' header is visible with a shopping cart icon and the quote ID 'Q-00018'. Action buttons include 'Add Products', 'Add Group', 'Quick Save', 'Calculate', 'Cancel', and 'Save'. The main content is a table with the following data:

PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
	T-Mobile Family Plan Bundle	1.00	\$150.00		\$150.00	\$150.00
	T-Mobile Phone Plan	1.00	\$70.00		\$70.00	\$70.00
SUBTOTAL:						\$220.00
QUOTE TOTAL:						\$220.00

Each row in the table has a set of icons on the right side. The first row (T-Mobile Family Plan Bundle) has a star, a yellow wrench icon, a document icon, and a trash icon. The second row (T-Mobile Phone Plan) has an information icon. The wrench icon indicates that the product in that row can be edited.



Configuration Type : Allowed

Configuration Event : Always

Salesforce CPQ Configuration

Configuration Type ⓘ

Allowed

Configuration Event ⓘ

Always

Disable Reconfiguration ⓘ

Option Selection Method: Add

Option Selection Method ⓘ

Add



Go to Quote -> Add Product->Select

Q-00018 **Product Selection** 1 ▼ ★ Select Select & Add More Cancel

<input type="checkbox"/>	PRODUCT CODE	PRODUCT NAME	PRODUCT FAMILY	PRODUCT DESCRIPTION	LIST PRICE
<input checked="" type="checkbox"/>		T-Mobile Family Plan Bundle	Bundles		\$150.00

You will see Add Options under Features

Q-00018 **Configure Products** ▼ Apply Rules Cancel Save

T-Mobile Family Plan Bundle

Phone Plan

[Add Options](#)

International Calling

[Add Options](#)

Device Protection

[Add Options](#)



Click on the Add Option and Select the Option

Q-00018 **Configure Products** Select & Add More Add Cancel

Phone Plan

PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION
<input checked="" type="checkbox"/>	T-Mobile Phone Plan	

You will be able to see option added under the product

Q-00018 **Configure Products** ▼ Apply Rules Cancel Save

T-Mobile Family Plan Bundle

Phone Plan

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/> 1.00		T-Mobile Phone Plan		\$70.00

Add Options

International Calling

Add Options





Hi there! I'm Smriti Sharan!

THANK
YOU!

