Salesforce CPQ Designing Interview Questions

What is CPQ ?

CPQ is Configure Price Quote. It is a Sales related tool.

Let's understand with help of example. Prospective customer goes to mall and see the products. Customer fill forms and give number to sales agent. So, he become lead for that product. Now sales person makes to the prospective customer call asking interest in product. So, from lead prospect, there is qualification. Now, prospective customer says I am interested but request for discount. This is called pricing negotiation. So the sales person sends quote with price to customer. After that again customer bargains which is called negotiation. After Quote is Finalized, order is placed for the product. If it a subscription product then contract is created. If it is non subscription product then asset is created

Why we use CPQ?

In Salesforce we have Product Catalog. Without CPQ we need to maintain product list in excel. Excel had number of products, product family and use filter. Now if 10 products are added or removed we need to maintain excel or if a product feature is removed we need to update the excel which is complicated.

Another problem is managing pricing. Different products can have different prices in different countries and the value can change daily based on currency. Now updating daily this in excel is very complicated.

Giving discounting is also hard without CPQ. With CPQ we can automate discounting process.

The benefit of using CPQ is it increases sales productivity. It reduces manual effort of sales team.It reduces probability of making human errors.

What is CPQ Lifecycle?

Lead -> Opportunity-> Quote-> Order

Provide Lifecycle from Order to Contract?

1.Create Opportunity ➔ 2. Generate Quote ➔ 3. Create Order ➔ 4. Fulfill Order ➔ 5. Generate Contract ➔ 6. Manage Renewals and Amendments

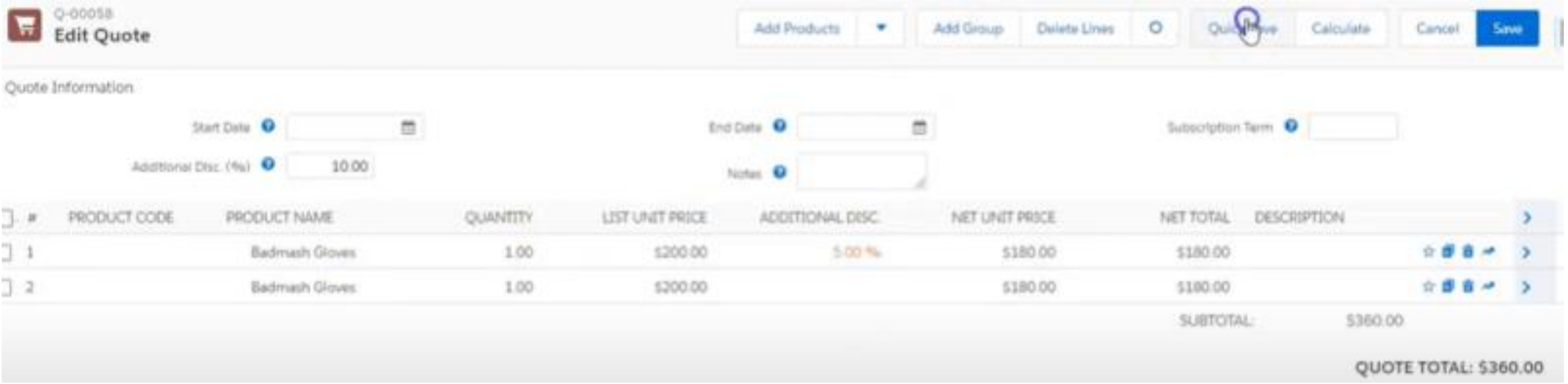
What are the steps in Quote to cash process in CPQ

1. Product Configuration
2. Pricing
3. Quoting
4. Approvals
5. Order Management
6. Contracting
7. Renewals and Amendments
8. Invoicing
9. Revenue Recognition

Salesforce CPQ
Quote Line Editor
Interview Questions

Q. What is the use of Quote Line Editor in Salesforce CPQ

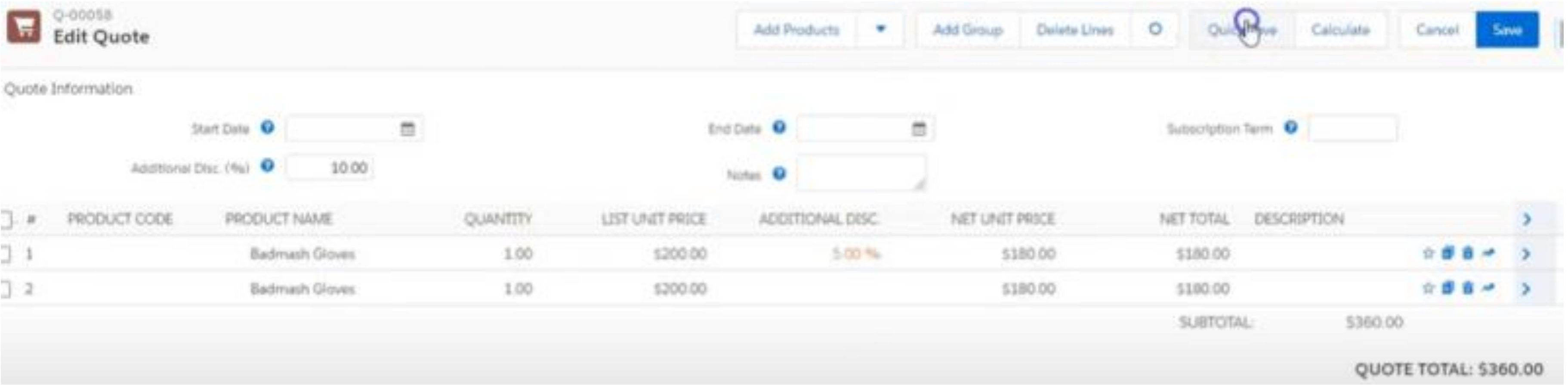
The Quote Line Editor in is used to manage the details of a quote, including product selection, pricing, discounts, and other important fields. It provides a **comprehensive interface** to edit line items, group products, and perform various operations to ensure the quote is accurate and meets customer requirements.



Q. How to add custom fields in Quote Information & Quote Line?

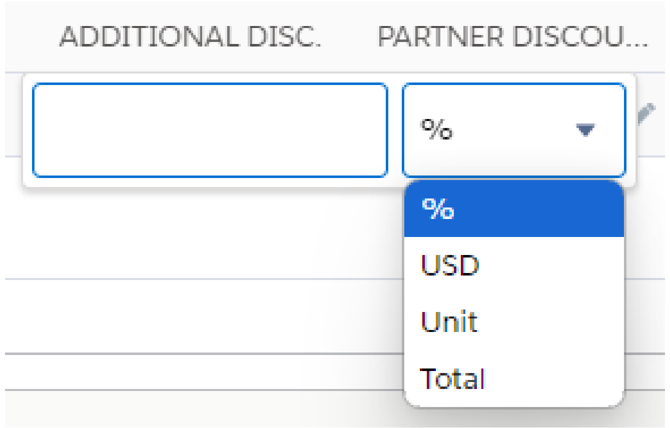
To add a custom field to the quote information, navigate to Setup > Object Manager > **Quote** > **Field Sets** > Line Editor.

To add a custom field to the quote line items, navigate to Setup > Object Manager > **Quote Line** > **Field Sets** > Line Editor.



Q. What is the use of Additional Discount

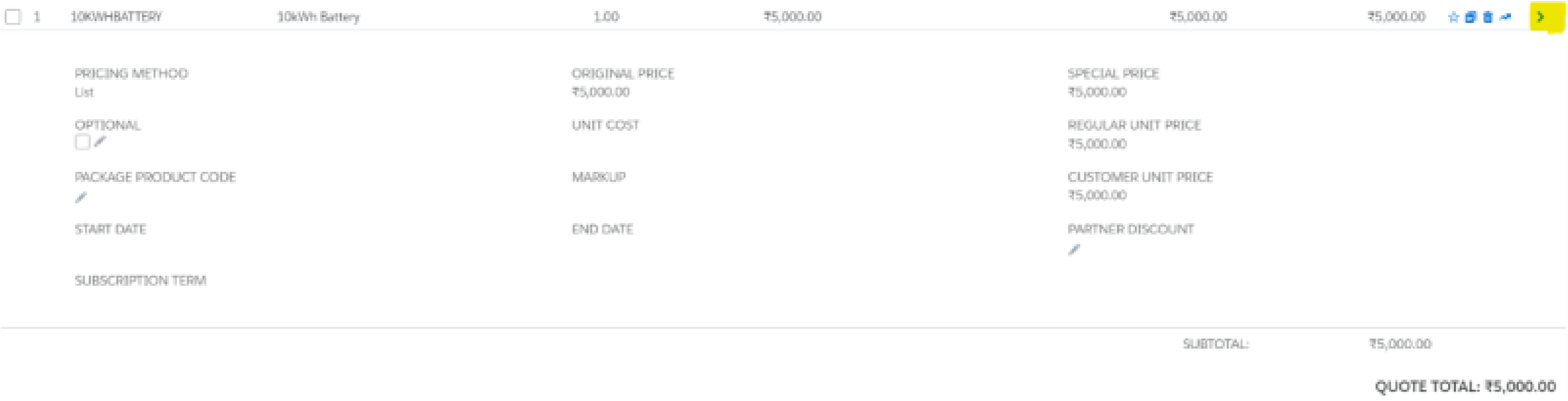
Additional (Manual) Discounts are applied via the Additional Discount field either as a **percentage, amount, unit price override, or a total line price override**. The first two options are out-of-the-box, but in order to use the last two options, it would be necessary to create a CPQ special field - **AdditionalDiscountUnit** field.



Q. Explain how the “Line Editor Drawer” enhances the functionality of the Quote Line Editor?

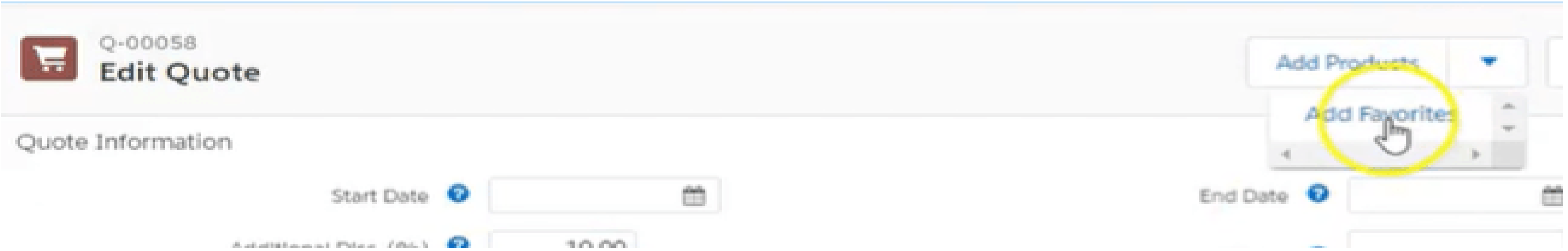
The “Line Editor Drawer” in the Quote Line Editor allows sales reps to view and edit additional fields related to each quote line without cluttering the main interface. By clicking the arrow icon next to a quote line, users can expand the drawer to see more detailed information and fields.

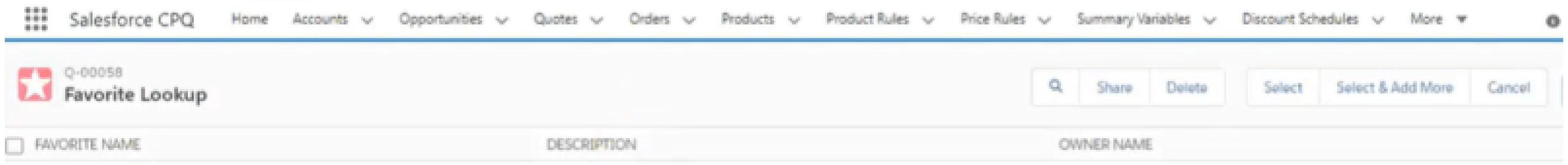
1. Go to CPQ Quote Line object SBQQ__QuoteLine__c)
2. Click on Fieldset and then Standard Line Drawer



Q. What does the "Add Favorite" button do in the Quote Line Editor?

The "Add Favorite" button allows users to add frequently used products to a favorites list. Sales reps can quickly access and add these favorite products to their quotes, improving efficiency and consistency in quoting.



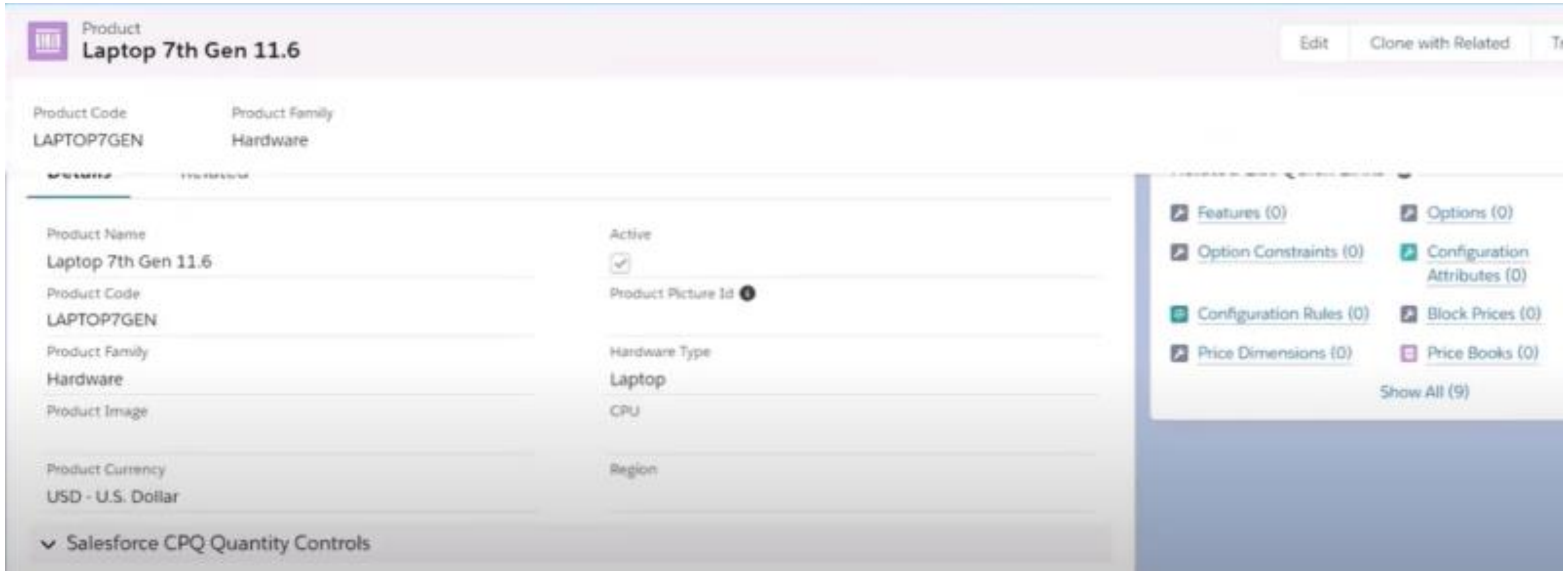


Salesforce CPQ
Product Questions

sfdc Amplified

Q. What are Products?

- In Salesforce CPQ, products are the items or services that a company offers for sale.
- It is the Standard Product object (Product2) but Salesforce CPQ extends the functionality and optimizes it by adding some package fields.
- Products include details like name, code, pricing, and options, which help ensure that quotes are accurate and reflect the available offerings.



Q. Type of Product in Salesforce CPQ?

Standalone Products: Individual items sold separately, like a single Dell laptop.

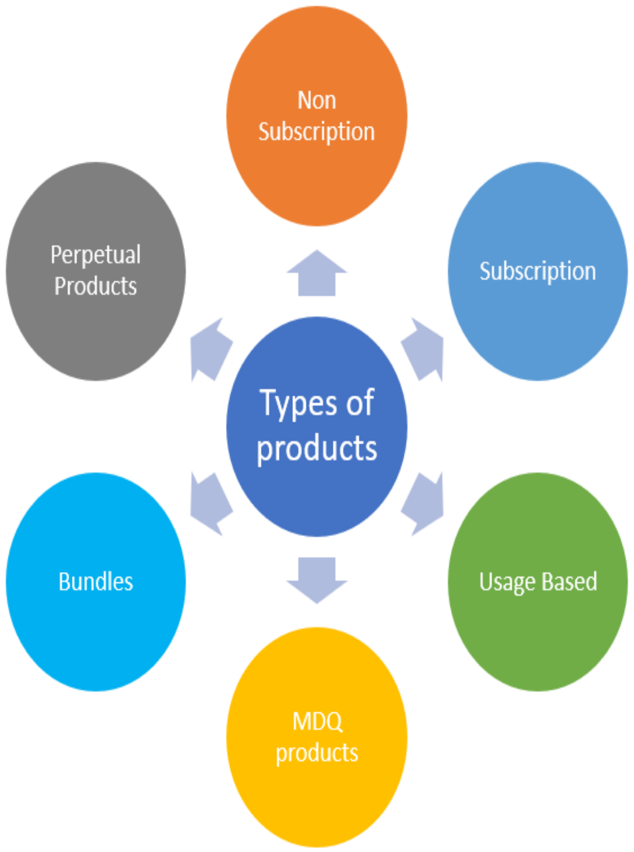
Subscription Products: Services or products sold on a recurring basis, like T-mobile internet plan.

Bundle Products: Packages of multiple items sold together, such as a Dell desktop bundle that includes a monitor, keyboard, and mouse.

Multi-Dimensional Quoting (MDQ) Products:
Subscription products that can be segmented over time, such as monthly or yearly billing for cloud services. Eg Life Insurance sold with different discount over the years

Usage-Based Products: Products priced based on usage, like data storage or network bandwidth. These products are EMI-based or One-time contracts based, once the contract or EMI is over these become Assets.th services.

Perpetual Products: These products are EMI-based or One-time contracts based, once the contract or EMI is over these become Assets. The price is not prorated.



Q. Subscription Product in Salesforce CPQ?

To enable a product to be ordered as a subscription product, **Subscription Pricing**, **Subscription Term** and **Subscription Type** fields have to be set up appropriately.

Subscription Pricing – Type of pricing to use for this subscription, either None, Fixed Price or Percent of Total. **None means this product is NOT a subscription product.**

Subscription Term – Term length of this subscription. Only applicable if the product is a subscription. **A BLANK value means this product is NOT a subscription product.**

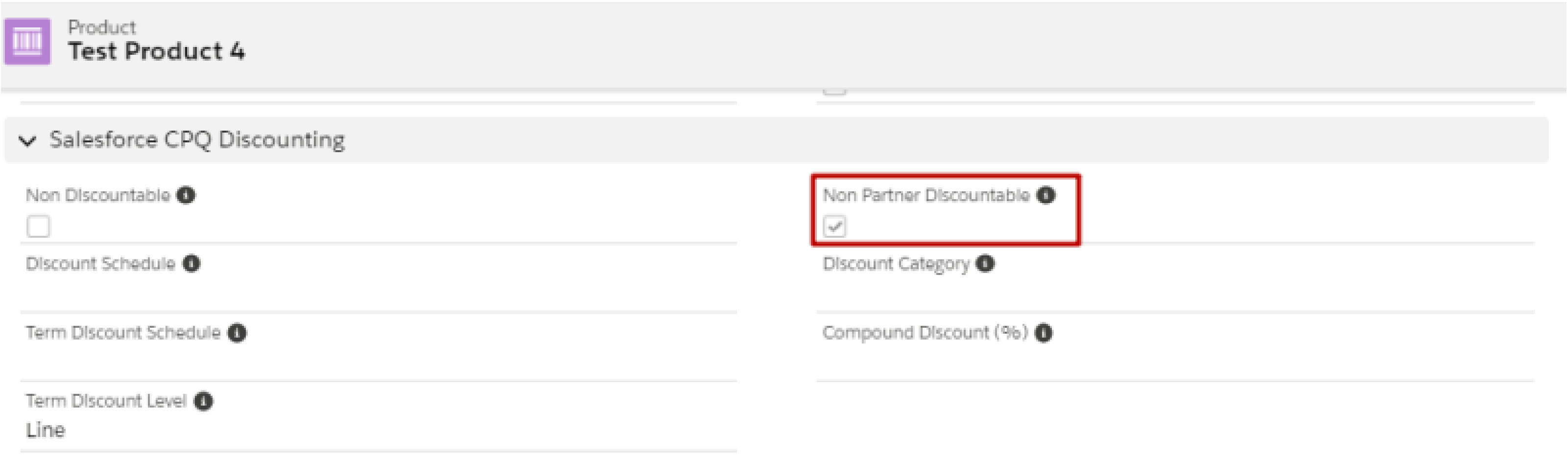
Subscription Type – Select the type of Subscription, either Renewable or One-time. Renewable Subscriptions transfers to Renewal Quotes. **One-time Subscriptions will not.**

Q. What is the significance of setting a product's default quantity and quantity editable fields in Salesforce CPQ?

The default quantity field sets a predefined quantity that appears whenever the product is added to a quote, streamlining the quoting process. The quantity editable field determines whether a user can change the quantity of the product in a quote, providing control over how products are sold and ensuring consistency in order quantities.

Q. How do you set up a product in Salesforce CPQ to ensure it cannot be discounted?

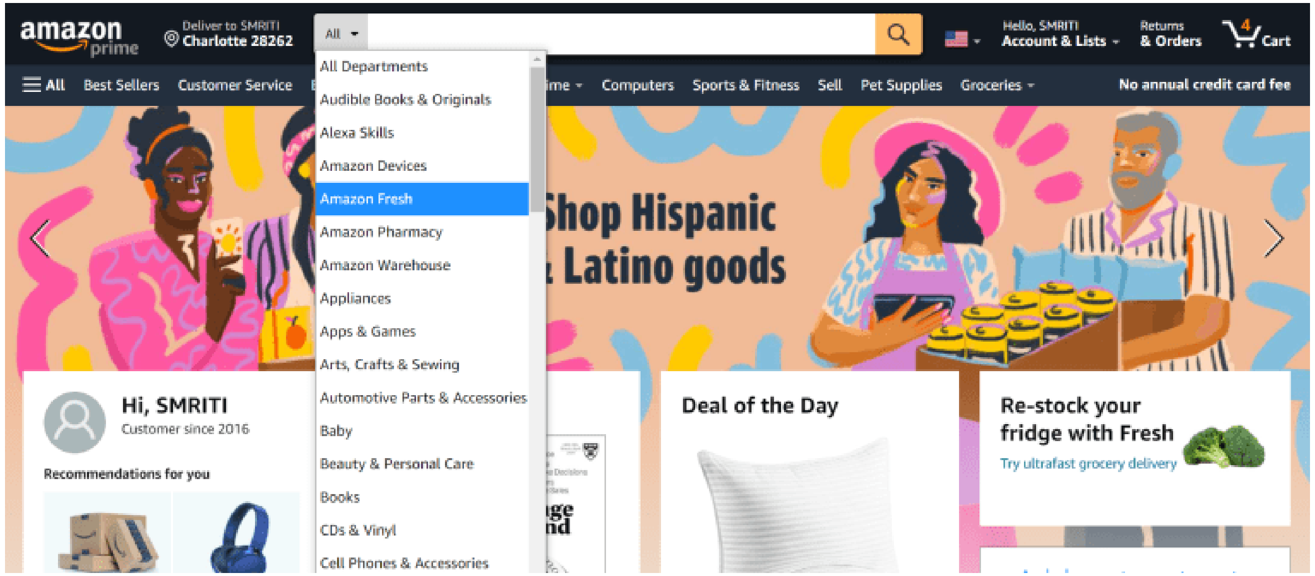
To set up a product as non-discountable in Salesforce CPQ, navigate to the product record and set the “Non-Discountable” field to true. This configuration ensures that the product’s price remains fixed, and sales reps cannot apply any discounts to it during the quoting process.



Q. What is Product Family?

Product family means it is the category of the product. By setting product family in salesforce the product automatically maps to it product family.

If you go to Amazon website, you will see different **categories like Books, Beauty, Appliances etc.**



Q. What does the ‘Optional’ checkbox signify in Salesforce CPQ product?

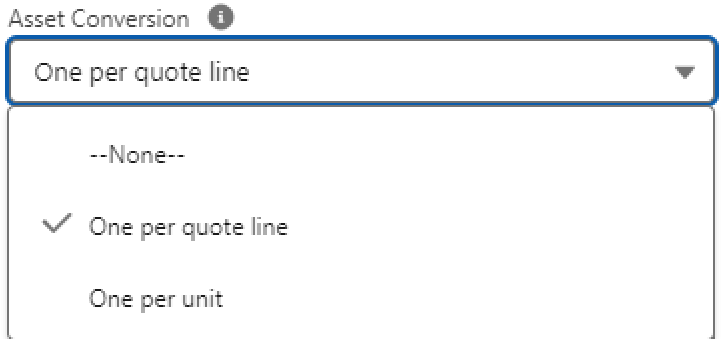
Optional product does not contribute to the quote total or get transferred to the opportunity

Q. How does the 'Asset Conversion' field work during the contracting process.

'None': Use this when you do not want the product to convert into an asset. This is common for items that don't require after-sale tracking or service, **such as promotional items or swag**.

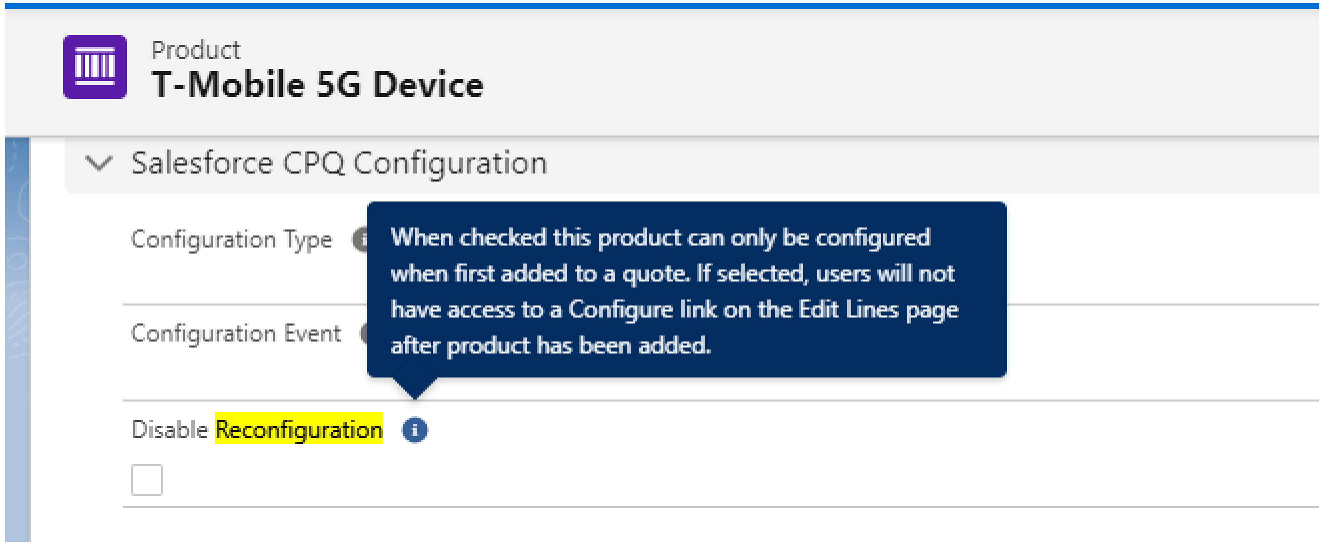
'One Per Unit': This setting creates one asset record for each unit of the product sold. This is particularly **useful for items that need individual tracking after the sale**, often used for products with serial numbers or that require individual service/support.

'One Per Quote Line': With this, regardless of the quantity sold, **only one asset record is created for each quote line**. This is efficient for bulk products or when individual tracking per unit is unnecessary.



Q. What is the function of the Disabled Reconfiguration checkbox on the product record?

The **Disabled Reconfiguration checkbox**, when set to true, prevents users from clicking the Reconfigure wrench icon on quote lines within the Edit Lines page for a specific product. This means the product can only be configured when it is first added to a quote and **cannot be reconfigured afterward**. This setting overrides the Configuration Event field, even if it is set to Edit or Always.

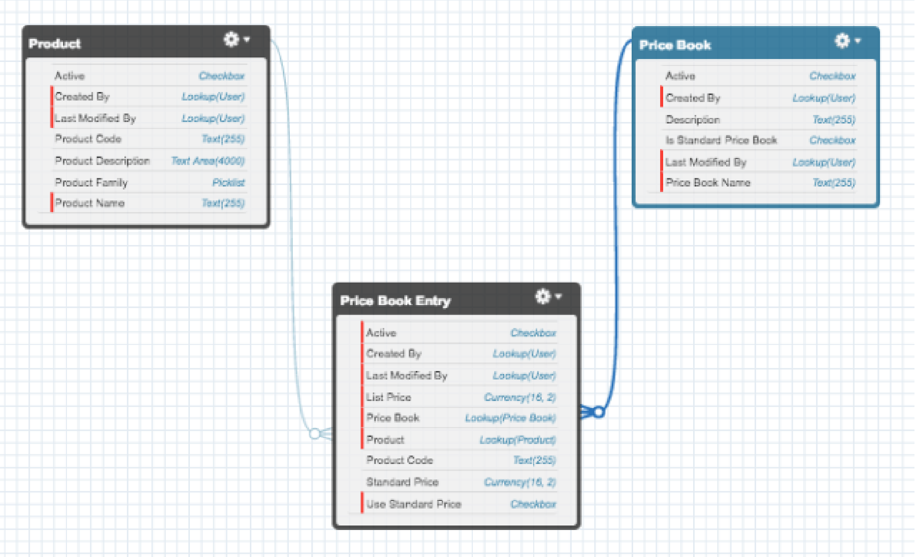


Salesforce CPQ
Product, Pricebook and Pricebook Entry Questions

Q. What is Relationship Between product, price book and price book entry?

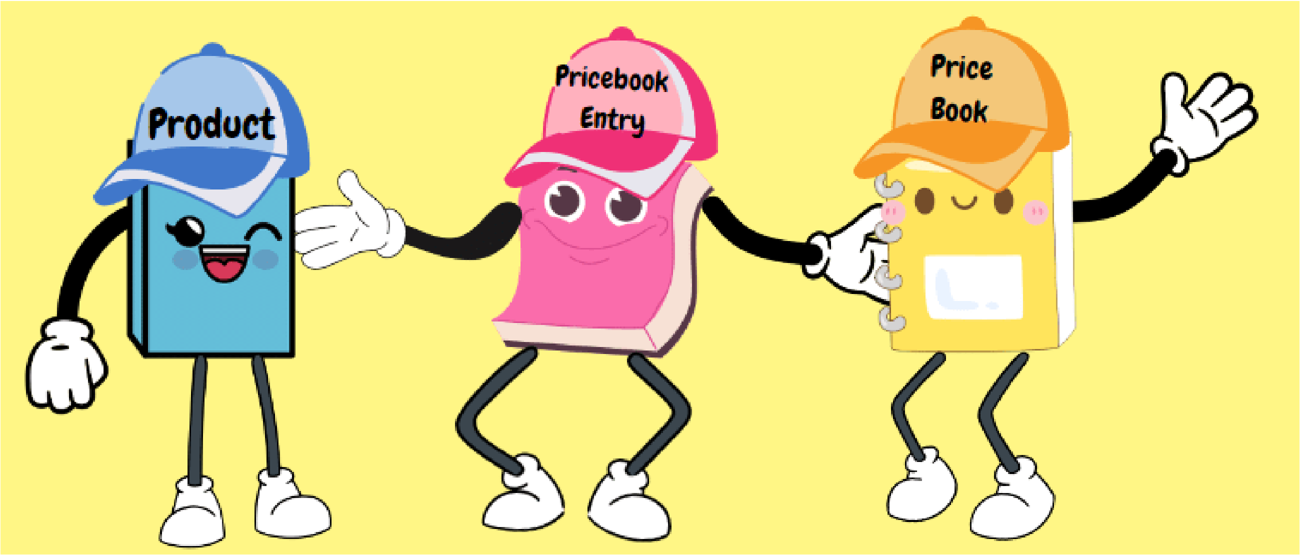
- Products are represented by– **Product2**
- Price Books are represented by– **Pricebook2**
- Each of the entry in price book is stored in– **PricebookEntry**.

PricebookEntry is the **junction object** between **Product** and **Price Book**. Every price book entry will have the product and the price book ID. This is how the relationship works.



Price book entry object is the relationship object between products and price books.
We manage price of product using price book. There are two types of price book:

- Standard Price Book
- Custom Price Book



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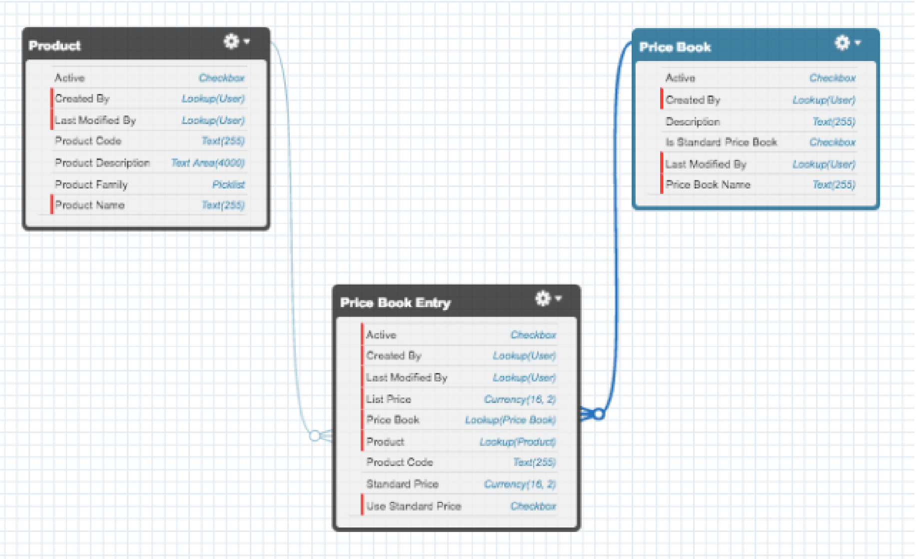


Q. What is Use of Standard Price book?

The ‘Price Book’ is often the default price book containing standard prices for all products. Sales teams. Standard use price books to ensure that consistent pricing is applied across quotes and orders.

Price Books

1 item • Sorted by Is Standard Price Book, Product Name, Currency ISO Code • Updated a few seconds ago

	Price Book Name	List Price	Use Standard Price	Active
1	Standard Price Book	USD 240.00	[ ]	[x]

Q. Can we delete Standard Price book?

A company can deactivate Standard Price Book, but not delete or archive it. In case a company changes prices in Standard Price Book, it may affect open and even closed Opportunities.

Q . How can we determine which price books are assigned to a user?

By default, the org-wide default setting for price book is “Use”. This means that any user with read access to both the “Product” and “Price Book” object will be able to select any active price book.

SETUP
Sharing Settings

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Quote	Controlled by Parent	Controlled by Parent	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Public Full Access	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

Q. How to control access to Salesforce Price Books?

A company can control access to Price Books by setting the Organization-wide sharing rule on Price Books to “View only” or “No Access” and then giving access to a particular Price Book based on the Role, Public Group.

Price Book Access Levels

FIELD	DESCRIPTION
Use	All users can view price books and add them to opportunities. Users can add any product within that price book to an opportunity.
View Only	All users can view and report on price books but only users with the “Edit” permission on opportunities or users that have been manually granted use access to the price book can add them to opportunities.
No Access	Users cannot see price books or add them to opportunities. Use this access level in your organization-wide default if you want only selected users to access selected price books. Then, manually share the appropriate price books with the appropriate users.

Salesforce CPQ Multi Currency Interview Questions

Q. How to use Price Books to sell products in multiple currencies?

If a company has a single price for a product regardless the currency, it can enable the multicurrency feature in Salesforce. Then, the conversion rates entered in Salesforce will automatically apply to product prices added to an Opportunity.

Q. Can the multi-currency feature be disabled once it is activated in Salesforce?

No, once the multi-currency feature is activated in Salesforce, it cannot be disabled. This setting is a permanent change to the Salesforce environment, emphasizing the need for careful planning and consideration before activation.

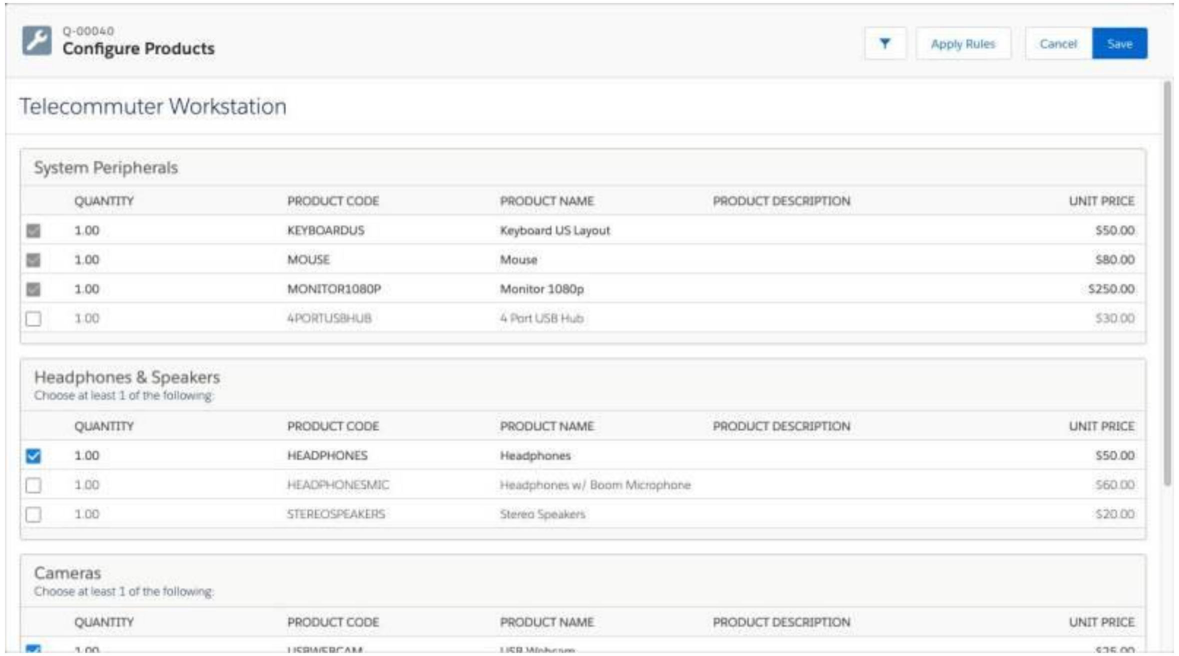
Q. How to setup multi currency for the product?

1. Go to Setup –> Company Information
2. Click on the Edit button
3. Check the Activate Multiple Currencies box and click Save
4. You will now see an extra button called Currency Setup, click it
5. By default, Advanced Currency management will be off
6. By default Parenthetical Currency Conversion will be on – this is what you will see on any currency field when your default currency and the currency of the record you are on do not match.
7. In the Active Currency section, click New
8. Select your Currency Type, add your conversion rate, and set your decimal places

Salesforce CPQ
Product Bundle Questions

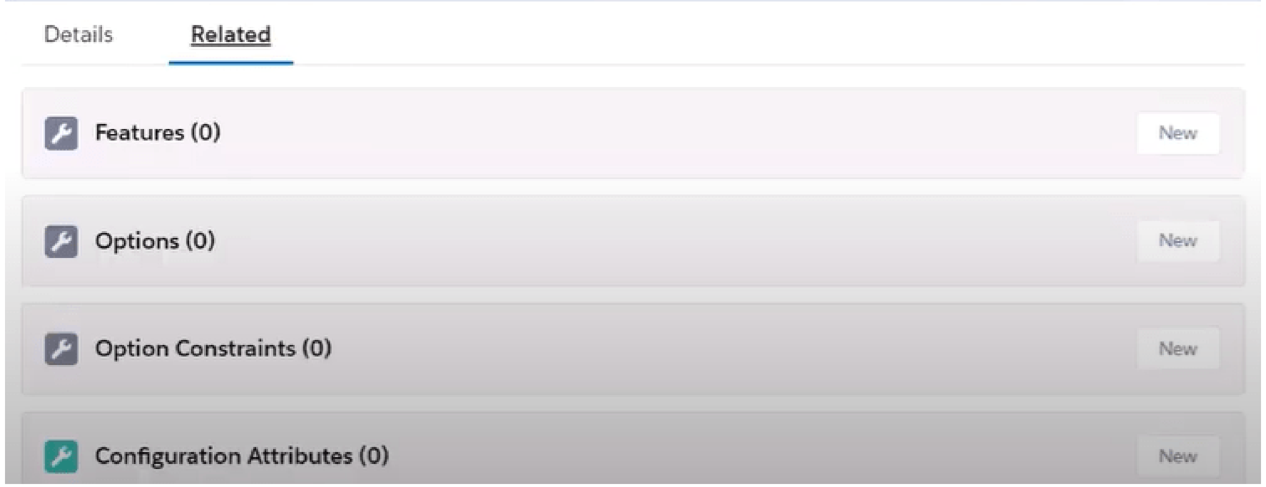
Q. What is the purpose of bundle products Salesforce CPQ?

Bundle products in Salesforce CPQ allow to group multiple items together, offering a complete solution to customers. For example, a Dell desktop bundle might include the desktop, monitor, keyboard, and mouse, providing a cohesive package at a discounted price compared to buying each item separately.



Q. Explain role of Features, Options, Option Constraints?

1. **Products**: The bundle product as well as all the sub-products included in the bundle.
2. **Product Options**: A Product Option record for **EACH sub-product** to associate it with the bundle product. One Bundle can have many Product Options.
3. **Product Features**: Optional. Product Options having **similar characteristics** can be grouped together using a Product Feature. One Bundle can have many Product Features.
4. **Option Constraints**: Optional. Option Constraints ensure that all users select only **compatible options**.
5. **Configuration Attribute**: Optional. Set the value of a specific field on multiple Product Options included in a Bundle or Feature.



Q. Can you describe the main types of bundles in Salesforce CPQ?

Static bundle. This would be the traditional, pre-packaged, fixed bundle where you sell certain products together at a fixed price, and the user doesn’t need to go into the configuration because no adjustments are allowed.

Configurable Bundle. This type of bundle can be configured with certain restrictions to avoid impossible configurations. The user can select different options to customize the bundle to meet the customer’s needs.

Nested Bundle. These are bundles within other bundles. It’s recommended to keep the nested bundles on to three levels deep. Nested bundles are easily created by adding the parent product of a bundle as an option to another bundle.

Virtual Bundle. This type of bundle works as a container for other products. To set up a virtual bundle parent, it should be associated with a price of $0.00.

Dynamic Bundles. These functions in conjunction with product filter rules let your sales reps’ select products from a pre-filtered list of options they are allowed to choose from.

Q. What is the use of Bundled Checkbox?

If we select bundled checkbox in the Option, then there will no price for the child product.

Example: There is Laptop as parent product and mouse as product option and is having bundled checkbox as true then there will be no price charged for mouse if customer is purchasing Laptop Bundle.

Q. What are the steps to implement a Dynamic Bundle in Salesforce CPQ?

Dynamic Bundles allow sales reps to choose their own options within a bundle, based on predefined filter rules. Unlike standard bundles where all products are predefined and fixed, Dynamic Bundles use filter rules to dynamically display options that meet certain criteria. For example, if a sales rep is configuring a “Cables and Adapters” bundle, they will only see options relevant to that category, such as products that start with “USB.”

– Create a Feature: Define a feature to categorize product options within the bundle.
– Create a Product Rule: Set up a product rule to specify the logic for which products should be included or excluded based on the filter criteria.
– Create an Action: Define actions to automatically add, remove, show, or hide products based on the product rule conditions.
– Create a Configuration Rule: Link the product rule and actions to the specific bundle to ensure the filtering logic is applied during the configuration process.

Q. How can you control when sales reps can configure bundles in Salesforce CPQ?

In Salesforce CPQ, the ability for sales reps to configure bundles can be controlled by setting the product's Configuration Event and Configuration Type fields. Additionally, the reconfiguration capability can be completely disabled by setting the Disable Reconfiguration checkbox on the product record. This prevents users from reconfiguring a product after it has been added to a quote.

Q. What is the role of “Configured SKU” in a product feature?

The “Configured SKU” field in a product feature links to a specific product or package that is being configured. This SKU serves as a reference for the overall configuration and helps track the combination of options selected under that feature.

Q. What is the purpose of setting “Min Options” and “Max Options” in a feature?

The “Min Options” and “Max Options” fields define the minimum and maximum number of options that can be selected under a feature. For example, if “Min Options” is set to 1, the user must select at least one option. If “Max Options” is set to 3, the user cannot select more than three options. These settings help enforce configuration rules and ensure that users make valid selections.

Q. How should a bundle with 20 Product Features and 50+ options each be configured to avoid excessive scrolling during quoting?

Option Selection Method: Set the Option Selection Method to “ADD” for all Product Features. This replaces long lists with an “Add Options” link, minimizing scrolling.

What are the three Option Selection Methods available in Salesforce CPQ features, and how do they differ?

Click: Displays options as a list with checkboxes, allowing users to **select multiple options directly.**

Add: Collapses the options into an 'Add Options' button. Users click this button to navigate to a separate page to view and select products. This method is useful for bundles with many features and lengthy option lists.

Dynamic: Similar to 'Add,' but the 'Add Options' button presents a pre-filtered list of products available for selection, leveraging Salesforce CPQ Filter Product Rules for Dynamic Bundles.

How to Link Product ‘Option’ with ‘Feature’?

Create Features like Computer, Printing, Networking

Create Options. While Creating in the ‘Feature’ field select a particular Feature to create the link.

In the Quote Line Editor you will See features under which particular options will be displayed.

What is the purpose of setting an option product as ‘Selected’ or ‘Required’?

Selected: When an option product is set as ‘Selected,’ it is automatically selected when the bundle product is added to a quote. The user can deselect it if it’s not set as ‘Required.’

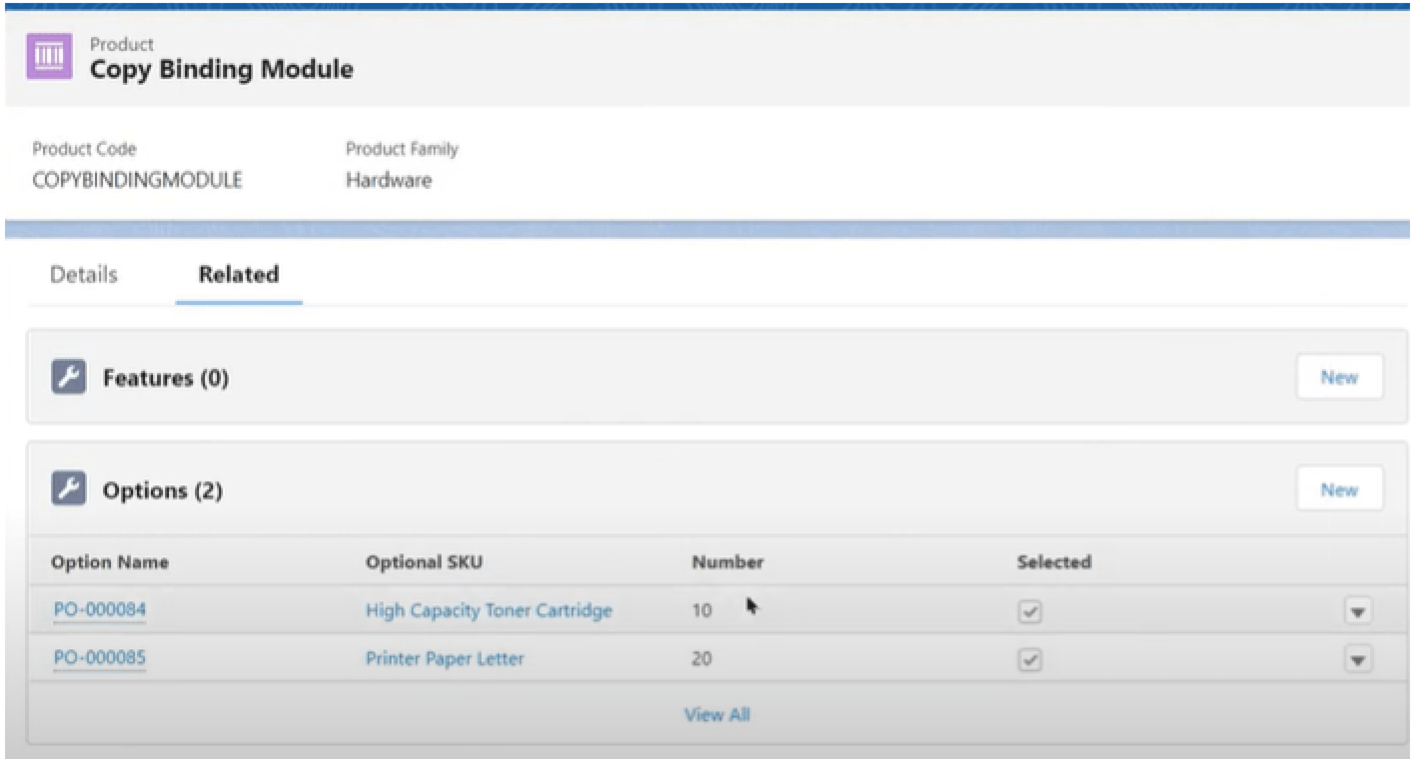
Required: When an option product is set as ‘Required,’ it must be included in the bundle and cannot be deselected by the user.

How does bundle pricing work in Salesforce CPQ, and what are some common strategies used?

The ‘Bundled’ checkbox, when checked, indicates that the product option is included with the parent product at no additional cost. This means the List Price will show as “Included,” and the Net Price will be $0.00, regardless of the option’s actual price in the price book. If the product option should contribute to the total price, this checkbox must be left unchecked.

How do you set the order of product options in a bundle product?

To set the order of product options in a bundle product, assign a number to each option**. It’s a good practice to use intervals like 10, 20, 30 to allow for easy insertion** of new options without having to renumber existing ones.



Can you explain how Option Discounts work with an example?

Option Discounts are applied to specific products when they are part of a bundle. For example, if you purchase a “Home Office Setup” bundle that includes a laptop, printer, and desk, the laptop might have a $100 discount only when bought as part of this bundle. If purchased separately, the discount does not apply. This encourages customers to buy the complete bundle for a better deal.

How does the Option Pricing Override function in Salesforce CPQ?

Option Pricing Override allows for different pricing when a product is sold as part of a bundle versus when it is sold alone. For example, a coffee might cost $2 when sold separately, but only $1 when bundled with a sandwich. This is set up by entering a value in the Unit Price field on the option record, which overrides the price book value. However, it doesn’t apply to products with Block or Percent of Total pricing methods, or if the Bundled checkbox is checked.

Explain the function and implications of the ‘Apply Immediately’ field on the Product Option record.

The ‘Apply Immediately’ field, when checked, triggers the evaluation of rules immediately after a product option is selected, with changes taking effect in the configurator right away. This setting provides instant feedback and updates but should be used sparingly to avoid performance issues and a slow user experience. If not checked, changes apply only after the user saves or navigates to another bundle level.

What are the purposes of the ‘Quantity’ and ‘Quantity Editable’ fields in the Product Option record?

The ‘Quantity’ field sets the default quantity of a product option that will be added to the quote.
The **‘Quantity Editable’ field specifies whether this default quantity can be edited by** the user in the quote line editor. This allows for flexibility in how product quantities are handled within a bundle.

Explain the significance of the ‘Selected’ and ‘Required’ checkboxes on the Product Option record ?

The ‘Selected’ checkbox, when checked, pre-selects the product option when a user enters the configuration. The user can still deselect it if it’s not required. In contrast, the ‘Required’ checkbox ensures that the product option is mandatory in the configuration, preventing the user from deselecting it. This is useful for enforcing necessary components in a bundle.

How does the ‘Number’ field on the Product Option record affect the display of options?

The ‘Number’ field determines the display order of product options within their feature category in the configuration interface. Options with lower numbers are displayed first. This ordering helps organize options logically, improving the user experience during product selection.

What role do Product Options play in creating a bundle in Salesforce CPQ?

Product Options are essential in forming a bundle in Salesforce CPQ. They act as the “children” products that are associated with a “parent” product in the bundle. The relationship between the parent product (configured SKU) and the optional products (optional SKUs) is defined through the Product Option records. This setup allows for detailed customization and configuration of the bundle.

Salesforce CPQ
Option Constraint Interview Questions

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What are option constraints?

Option Constraints allow you to enable or disable a **Product Option** for selection based on the selection of another product option in the same bundle product.

Option Constraint Types

Based on its behavior, Option Constraints are of two types, **Dependency and Exclusion**. It is determined by the **Type** field on the Option Constraint record.

Dependency

- Selecting the **Constraining Option**enables the **Constrained Option** for selection.
- For example – Enable Product A only if Product B is selected.

Exclusion

- Selecting the **Constraining Option**disables the **Constrained Option** for selection and **vice versa**.
- For example – Disable Product A if Product B is selected.

Walk us through the steps to create an Option Constraint in Salesforce CPQ using the example provided?

– Navigate to the Products tab and select the relevant product (e.g., ProductPack1).
– In the Related tab, find the Options related list and note the Option Name numbers for Product A, Product B, and Product C.
– Go back and in the Option Constraints related list, click New
– For the first constraint, enter a descriptive name like "Product A requires Product B" in the Constraint Name field, select the Option Number for Product A in the Constrained Option field, and the Option Number for Product B in the Constraining Option field. Enter "AA" in the Option Constraint Group field.
– Click Save

Describe a scenario where Option Constraints with grouping would be necessary.

An Option Constraints with grouping scenario is necessary when a product option should only be available if multiple other options are selected. For example, if Product A should only be sold when both Product B and Product C are also included in the bundle, you would create two separate Option Constraints, each linking Product A to Product B and Product C, and group them together. This ensures that Product A can only be selected if both B and C are present.

In what scenarios would you prefer to use Option Constraints over Product Rules?

Option Constraints are preferred when the requirement is straightforward dependency or exclusion between product options. They are particularly useful for real-time processing, as they provide immediate feedback to the user upon selecting or deselecting options.

In contrast, **Product Rules require an evaluation event (such as Load, Edit, Save, or Always) to** trigger rule calculations, which can introduce a slight delay in feedback.

Salesforce CPQ Product Rule Interview Questions

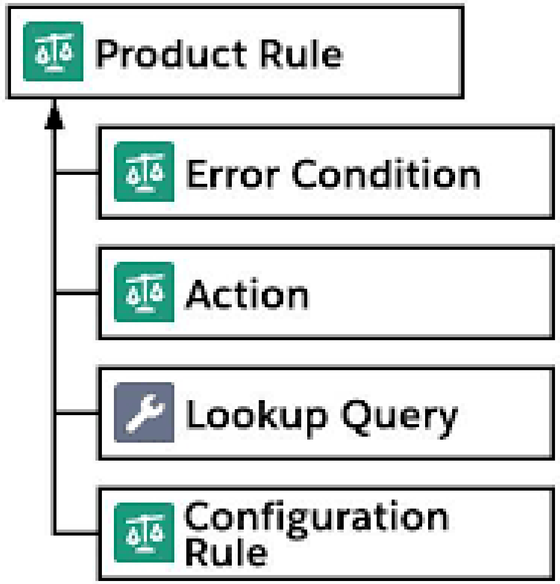
What are Product Rules

- Product Rules are used to enforce business logic, help automate feedback to sales reps about product selections and they also accelerate the quoting process.
- There are 4 types of Product Rules:
- **Validation Rules:** When the conditions are not met, an error message is displayed, and the users can't continue until the situation is fixed. So, they act as a **hard stop**.
- **Alert Rules** are a **soft stop** as compared to the Validation Rules' hard stop. They also display a message, but it's more as a suggestion because the user can proceed without meeting the specified business requirements.
- **Selection Rules**: can **add, remove, show, hide, enable, or disable** or perform some combination of these actions on product options within a bundle or they can add a product to a quote. This rule can be a great way to leverage Guided Selling to guide your reps to the appropriate or most desired options by automatically selecting the right products.
- **Filter Rules** are used in bundles to pull in product options from the product catalog using a **filter** rule. This is often referred to as creating a dynamic bundle.

What are the key components of a Product Rule in Salesforce CPQ?

The key components of a Product Rule in Salesforce CPQ include:

Product Rule: The main logic container that defines the rule's type, conditions, and actions.
Error Conditions: Conditions that trigger the rule based on specific criteria, such as product attributes or configuration attributes.
Product Actions: Actions that are taken when the rule is triggered, such as adding, removing, showing, or hiding products.
Configuration Rule: Links the Product Rule to specific products or bundles, specifying where and when the rule should apply.



What is the function of the “Scope” field in a product rule?

The “Scope” field in a product rule determines where the rule is applied within the Salesforce CPQ process. It can be set to either “Product” or “Quote”:

- **Product Scope:** The rule applies during the product configuration process, affecting the selection of products and options within a bundle.
- **Quote Scope:** The rule applies at the Quote Line Editor stage, impacting the overall quote, such as pricing and discount applications.

Example: For Dell, a rule with a “Product” scope might ensure that only compatible hardware components are selected when configuring a server bundle. A “Quote” scope rule might ensure that discounts are applied only to certain product lines or customer types.

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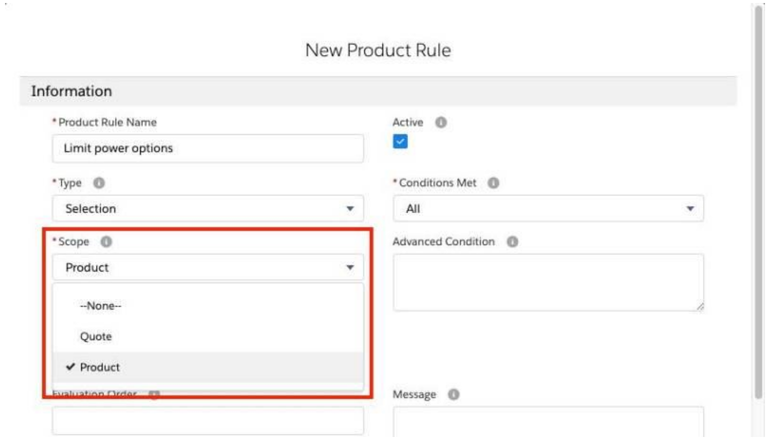


How do Error Conditions work within a Product Rule, and what is their function in this scenario?

Error Conditions within a Product Rule define the specific criteria that trigger the rule's actions, such as displaying an error message. In this scenario, the Error Condition checks if the Summary Variable for Product B's total quantity is less than the Summary Variable for Product A's total quantity. If this condition is met, the rule fires, and the system prevents the user from saving the configuration until the condition is resolved.

95.Can Product Rules and Option Constraints be used together, and if so, how?

Yes, Product Rules and Option Constraints can be used together in Salesforce CPQ to create a more comprehensive configuration experience. For example, Option Constraints can handle straightforward dependencies and exclusions with real-time feedback, while Product Rules can manage more complex scenarios like dynamic product selection, validations, and conditional actions.

What is the purpose of Selection Rules in Salesforce CPQ, and how do they enhance user experience?

Selection Rules automatically manage product options within a configuration. They can add, remove, show, hide, enable, or disable product options based on specified criteria. This automation streamlines the configuration process, ensures users select compatible products, and reduces the likelihood of errors. For instance, if a user selects a specific carrier, the rule can automatically add relevant service plans while removing incompatible ones.

Type	Description
Add	Add the specified option.
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.

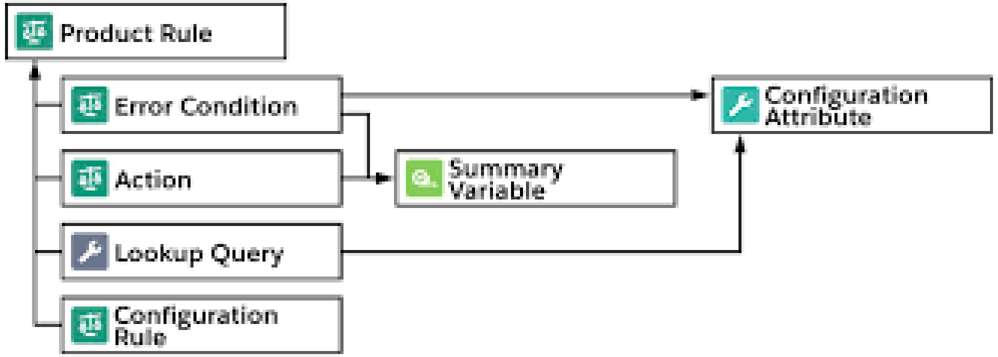
What considerations should be taken into account when setting the Option Selection Method to ‘Dynamic’?

When setting the Option Selection Method to ‘Dynamic,’ it’s important to set up a Salesforce CPQ Filter Product Rule. This rule pre-filters the list of products available for selection, streamlining the process for users by only showing relevant options.

How is a Configuration Rule related to a Product Rule?

A Configuration Rule links a Product Rule to specific product bundles or configurations, ensuring that the rule is applied in the appropriate context. This association allows for targeted rule application within certain products or scenarios.

They may be used in Lookup Queries or Error Conditions to dynamically adjust the rule's logic based on user input or other factors.



What are configuration attributes and how are they used in product rules?

Configuration attributes are fields that sales reps can set during the product configuration process. They can be used in error conditions to determine whether a product rule should trigger, often based on selections or inputs made by the sales rep.

Example:

A configuration attribute might be “Operating System Preference,” where the choice between Windows and Linux triggers different sets of compatible software options and warranties.

Salesforce CPQ
Summary Variable Interview Questions

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Explain the role of Summary Variables in Salesforce CPQ Product Rules?

Summary Variables in Salesforce CPQ are used to aggregate numerical data, such as quantities or sums, across a set of records. They can summarize fields like quantity or price and are often used in conjunction with Product Rules to enforce conditions based on these aggregated values. For example, a Summary Variable could calculate the total number of smartwatches in a bundle to ensure that the warranty quantity does not exceed this number.

There are five aggregate functions we can perform for the aggregation while creating a summary variable.
Sum: It returns the sum of all aggregate field's values.
Average: Returns the average of all aggregate field's values.
Min: Returns the minimum of among all the aggregate field's values.
Max: Returns the maximum of among all the aggregate field's values.
Count: It counts the number of records that satisfy the condition of filter criteria.

Salesforce CPQ
Pricing Interview Questions

What are the pricing methods in Salesforce CPQ?

Pricing Method	Function
Block Pricing	The method is used if we are selling a product in some specific volumes. For example, pencils in boxes: small (10 pencils), medium (11-50 pencils), large (51-150 pencils).
Percent of total	It is used when we need to set the price for some product in Quote as a % of the total cost of products in Quote. The price for this product is % of the total Quote.
Cost plus markup pricing	Allows you to use not the automatic CPQ price substitution, but the base price of the product + surcharges.
Option Pricing	It is used when the price of the product included in the Bundle should differ from the standard price of this product in the Price List.
Contracted Pricing	Allows setting a special price for some clients (for example, lower than in the Price List).
Manual Override	Allows editing prices manually.

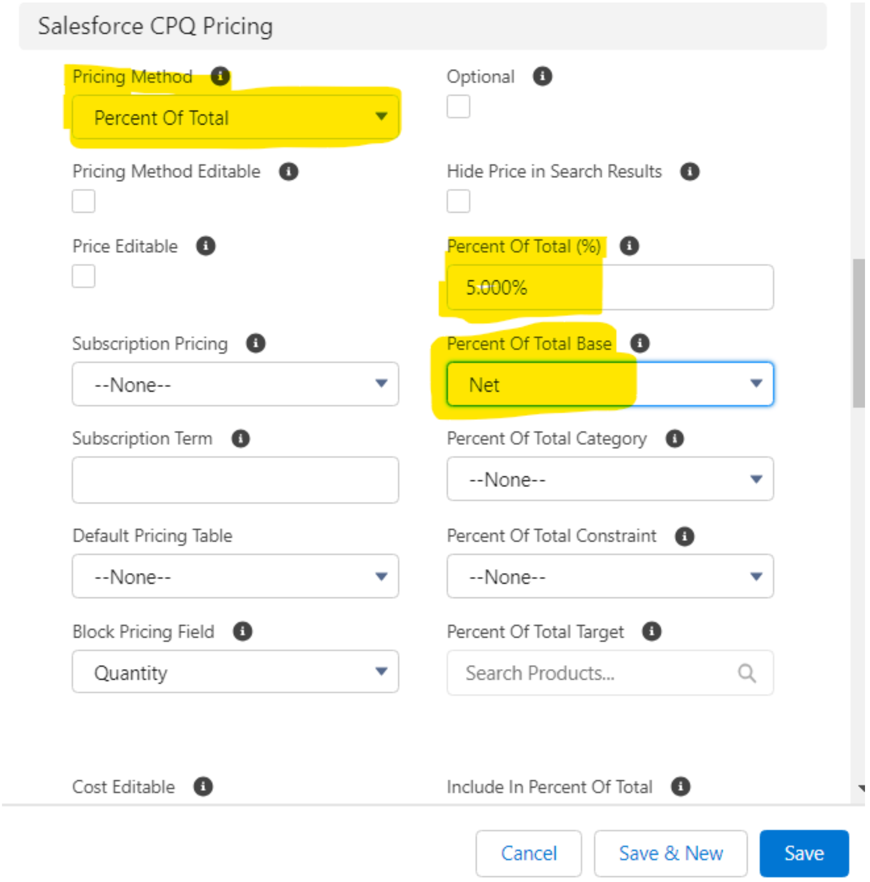
What is List Pricing in Salesforce CPQ, and when is it typically used?

List Pricing in Salesforce CPQ refers to using the fixed price from a product’s price book entry. This method is typically used for products with a static price that does not vary between customers or sales scenarios. For example, a book sold in a bookstore at a fixed price of $20 for all customers is an example of List Pricing. The price can be made editable if necessary, allowing for adjustments.

When should the ‘Percent Of Total’ pricing method be used in Salesforce CPQ?

The ‘Percent of Total’ pricing method is used when the price of a product should be a specific percentage of the total value of the quote, a particular quote line group, or another line item (like a primary product). This method is commonly used for add-ons or features where the price is dependent on the cost of the main product.

The ‘Percent Of Total Base’ field specifies the base amount on which the ‘Percent Of Total’ calculation is applied. It could be set to ‘List’ or another pricing metric.



Can you explain Block Pricing with an example?

Block Pricing is used for products sold in quantity ranges or “blocks,” each with a fixed price. For instance, if you buy envelopes, 50-250 units might cost $47.95, 250-500 units might cost $75.95, and 500-1000 units might cost $111.95.

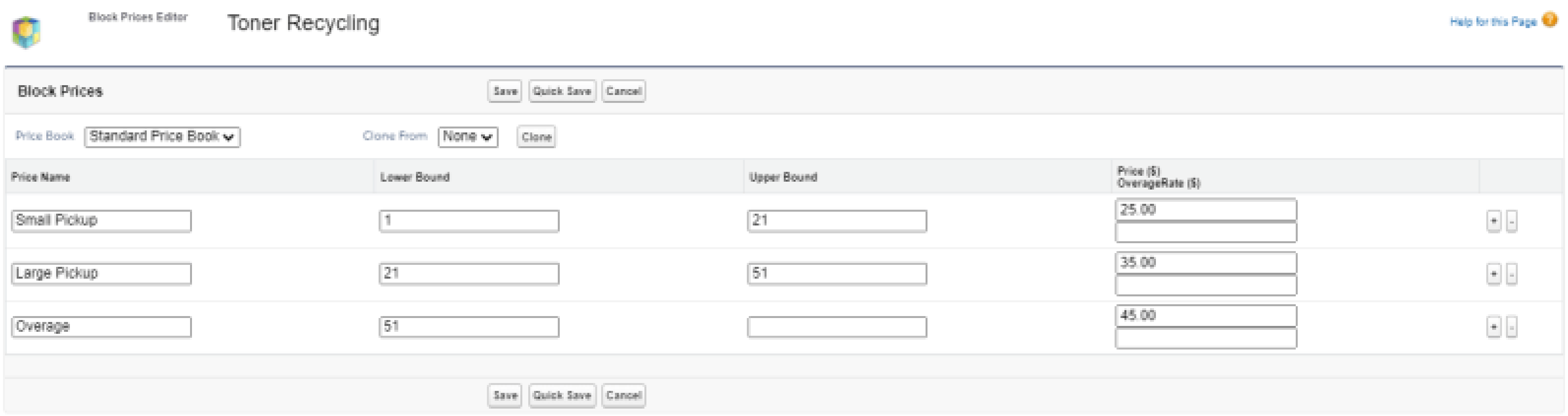
To set up the block pricing we need to update the 4 pieces of information.

Name: Set the name to block the pricing method.

Lower bound: The lowest quantity for the quantity range.

Upper bound: The highest quantity for the quantity range.

Price: Price to be set up for the given quantity range.



Block Prices Editor
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Help for this Page

Block Prices
Save Quick Save Cancel

Price Book: Standard Price Book | Clone From: None | Clone

Price Name	Lower Bound	Upper Bound	Price ($) OverageRate ($)
Small Pickup	1	21	25.00
Large Pickup	21	51	35.00
Overage	51		45.00

Save Quick Save Cancel

I want to give pricing slab 1-10-100,1-20-300,1-30-400 getting increase of every product how to setup in CPQ?

To set up a pricing slab in Salesforce CPQ where the price increases with the quantity, you can use the Price Book Entries and Block Pricing. Here's a step-by-step guide to set up the pricing slabs you described (1-10 units at $100 each, 1-20 units at $300 each, 1-30 units at $400 each):

1. Create the Product
2. Set Up Price Book Entries
3. Create Price Book Entries
4. Configure Block Pricing

What is contracted pricing in Salesforce CPQ?

Contracted pricing refers to special prices associated with a particular customer, which are considered during the quoting process.

Contracted Pricing sets specific prices for products for certain accounts, based on negotiated agreements. For example, if a customer has negotiated to buy notebooks at $4 per unit while others pay $5, this can be implemented using Contracted Pricing. It allows setting a direct price override, a discount percentage, or a discount schedule

What happens if you set the “Generate Contracted Price” action at the quote level?

It will apply the contracted price only for that quote.

How does the Cost Pricing method work in Salesforce CPQ?

Cost Pricing in Salesforce CPQ involves setting a product's price based on its cost and an additional markup, rather than using a fixed list price. This method is similar to how a car dealership might sell a car: the car costs the dealer $29,000, and the dealer sells it for $33,000, with the $4,000 difference being the markup. A cost record must be created for the product, and the markup can be applied as a percentage or fixed amount in the quote line editor.

How does Salesforce CPQ handle the list price and contracted price in the price waterfall?

Salesforce CPQ first considers the contracted price (if available) when calculating the Special Price. If no contracted price exists, the system defaults to the list price from the price book. This ensures that any negotiated pricing agreements with specific accounts are honored before standard pricing mechanisms are applied. For instance, if a product’s list price is $100, but there’s a contracted price of $90 for a particular customer, the CPQ system will use $90 as the starting point in the price waterfall.

Salesforce CPQ Discounting Interview Questions

Explain Discounting in Salesforce CPQ

Discounting method	Purpose
Optional Discount	Discount on a product sold as part of a bundle
Volume-Based Discount Schedule	A discount depends on the volume of purchase in % or fixed
Manual Discount	Manual setting of discount
Partner and Distributor Discount	Discount for partners

How to add Additional Discount in CPQ?

In Salesforce CPQ, additional discounts can be applied directly in the Quote Line Editor. This allows sales representatives to apply extra discounts on top of existing pricing rules and discounts.

Explain Partner and Distributor Discount in Salesforce CPQ?

This method is used when we want to give an additional partner discount to the client. The values for these discounts are displayed in the Distributor Discount and Net Unit Price fields on the Quote Line object. They are calculated by the following formulas:

Partner Price = Customer Price – Partner Discount

Net Price = Partner Price – Distributor Discount

What are Discount Schedules, and how are they typically used?

Discount Schedules in Salesforce CPQ offer quantity-based discounts or term-based discounts. For instance, a company might offer a 10% discount on software subscriptions if the customer commits to a 12-month term instead of a monthly subscription. Similarly, a discount schedule might provide increasing discounts as the purchase quantity increases, like a 5% discount for buying 10-20 units, and a 10% discount for 21-50 units

What are the Steps to Set Up a Discount Schedule?

1. Open Salesforce CPQ application from the app launcher.
2. Type ‘Discount Schedule’ in the search box of the app launcher.
3. Open the Discount Schedule tab and click on ‘new’.
4. Set the schedule name,
5. Set the type as Range or Slab according to the requirement.
6. Select the Discount unit from Percent, Amount and price options as per the requirement.
7. For the aggregation scope select Quote or Group as per the requirement.
8. Click on ‘Save’.

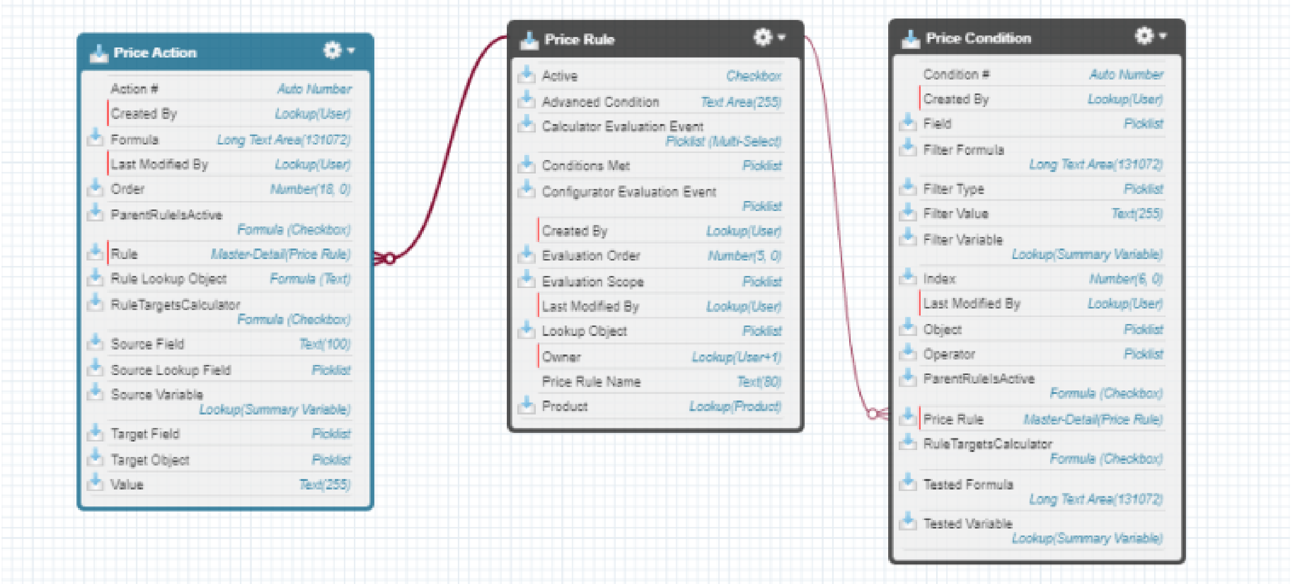
Salesforce CPQ
Price Rule Interview Questions

What are price rules?

Price Rules in Salesforce CPQ are used to inject values into quote or quote line fields, influencing pricing calculations. For example, let's say you want to have a "Buy One, Get One Free" offer.

The price rule included three related records:

1. Price Rule
2. Price Condition
3. Price Action



What are the main similarities and differences between Product Rules and Price Rules in Salesforce CPQ?

Both Product Rules and Price Rules share a similar structure, comprising general properties, conditions, and actions. However, Product Rules primarily enforce business logic related to product configurations, ensuring compatibility and optimizing product selection. In contrast, Price Rules automate price calculations and update fields on quotes and quote lines, affecting pricing and other related attributes.

How does the Evaluation Order field impact the application of Price Rules?

The “Evaluation Order” in a Price Rule is essential for defining the sequence in which the rules are evaluated during the pricing calculation process. It helps establish the priority and hierarchy of rules when multiple rules are applicable. Rules with lower Evaluation Order values are evaluated first.

What is the significance of the “Condition Met” field in a Price Rule?

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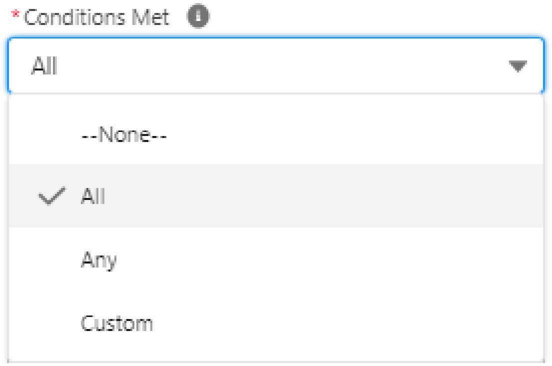

What role does a lookup query record play in a price rule?

A lookup query record in a price rule acts as a filter that determines which data rows from a custom object should be applied to a specific quote scenario. The lookup queries match fields in the quote or quote line with corresponding fields in the custom object, ensuring that only relevant pricing data is used to calculate the final price.

If we don’t put any object name in the lookup object field, then does it mean it won’t fetch data from that object and we cannot set condition based on a particular record?

That’s correct. If **you don’t specify an object name in the Lookup Object field** of the Price Rule, it means that the price rule **won’t fetch data from any specific object**. Without a lookup object specified, you won’t be able to set conditions or perform actions based on a particular record or data from another object.

The Lookup Object field is crucial for establishing a relationship between the Price Rule and a specific object. It enables you to access and leverage data from that object in your price rule logic. If you leave the **Lookup Object field blank, the price rule will not have a connection to any object, limiting its ability to reference data from other records or apply conditions based on specific values**.

Salesforce CPQ
Quote Interview Questions

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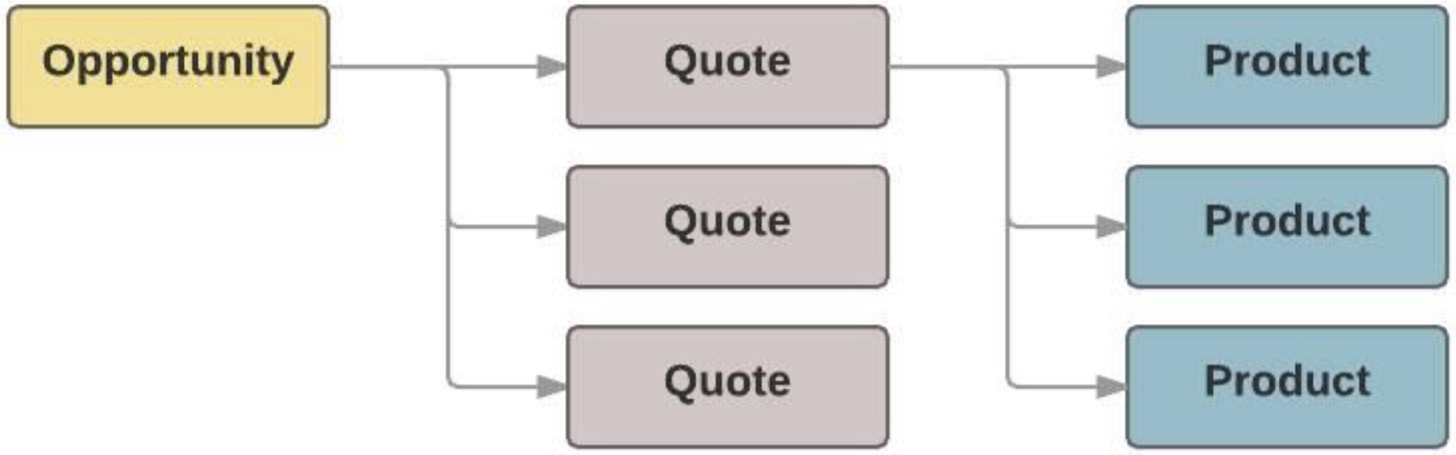
What is a Quote?

The electronic record in Salesforce that stores quote data, such as product details, pricing, expiration dates, and discount information.

How are Salesforce CPQ Quote and Opportunities connected?

Quotes in Salesforce CPQ are linked to opportunities. When creating a quote, sales reps select products and services, and these selections are recorded under the opportunity. Each quote can have different configurations and pricing, allowing sales reps to present multiple options to the customer under one opportunity.



What is Role of the Primary Quote?

The primary quote has a special relationship with the opportunity, where it syncs the quote's total amount and product details with the opportunity record. This means the primary quote's information updates the opportunity's Amount field and the Products related list. Only one quote per opportunity can be designated as the primary quote.

During negotiations, the client may express interest in one of the other quotes, at which point the rep can switch the primary Quote. This update instantly reflects the new pricing and product details on the opportunity, ensuring that all sales data is accurate and UpToDate.

Describe a scenario where using multiple quotes within an opportunity would be beneficial?

A scenario where multiple quotes are beneficial is during a negotiation phase with a customer who is considering different service levels or product bundles. For instance, a sales rep might create one quote that includes the full suite of products and services and another quote with a more budget friendly selection.

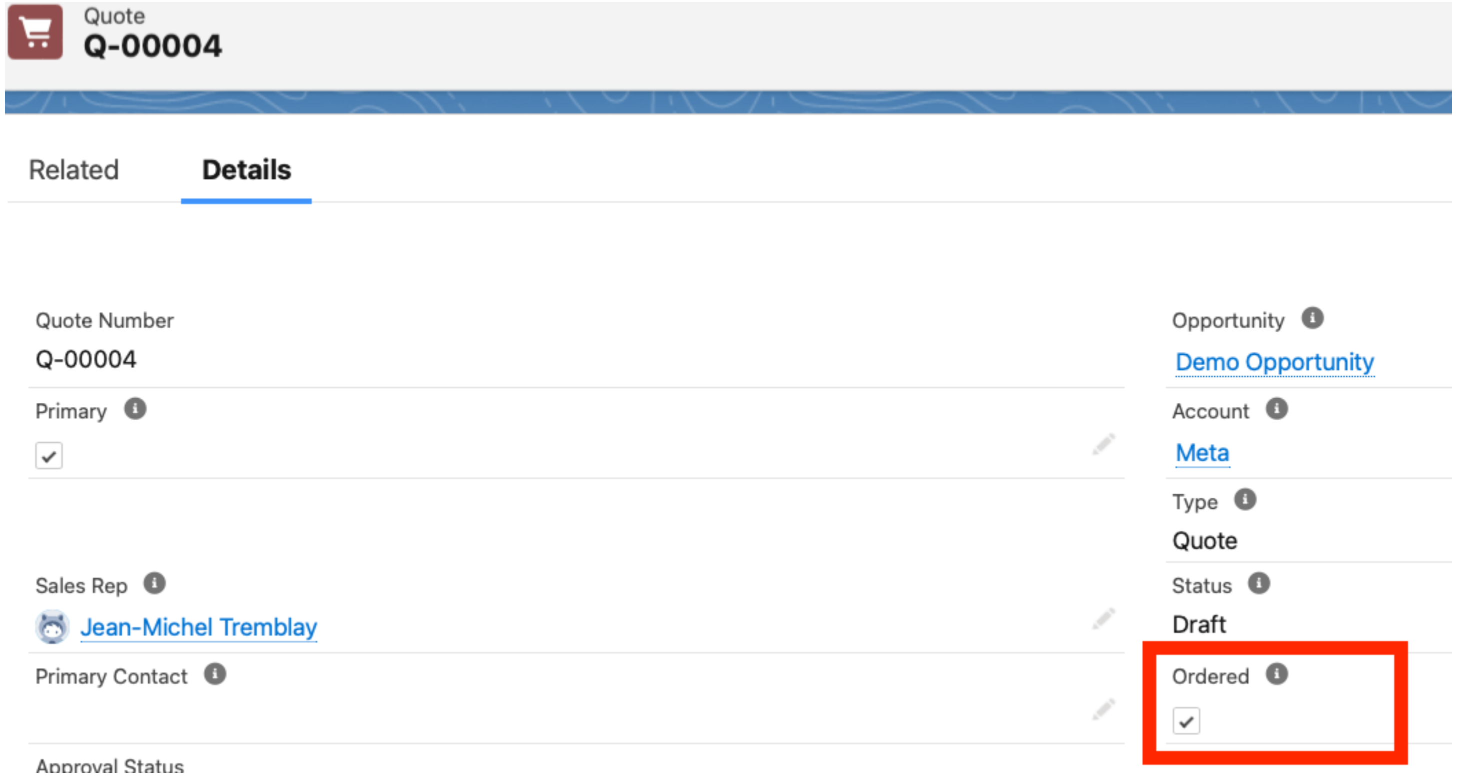
How does Salesforce CPQ handle the Start Date and End Date for subscriptions in a quote?

The Start Date indicates when the subscription services begin. If a Subscription Term is provided, the system can calculate the End Date. If both fields are filled, the End Date takes precedence.

Salesforce CPQ
Order Interview Questions

How to create an order and order products ?

You can either set the *Ordered* checkbox to true on the quote or the opportunity.



What are the ways to create Order?

In Salesforce, there are four ways to generate orders that can be used for different business situations:

Ordered Checkbox on Opportunity
This method is used when an opportunity has been finalized, and you need to create an order based on that opportunity.

Ordered Checkbox on Quote
This method is used when a quote has been accepted, and you want to generate an order directly from the quote.

Create Order Button on Opportunity
This method is useful when **you prefer a manual approach** to generate orders from opportunities, offering more control over the process.

Create Order Button on Quote
Similar to the opportunity-based button, this is used for manually generating orders from quotes, giving you the flexibility to review details before creating the order.

How to split order ?

This can be achieved with the help of the **Ordered checkbox**. By default, this checkbox generates a single order but, when used **in conjunction with either Order By Quote Line Group checkbox field, or the Order By picklist field**, it can split a single quote into multiple orders.

Orders can be split by Group

If groups are added to a quote, with the help of the **Order by Quote Line Group checkbox** field on the quote, orders can be split based on the quote line groups.

Orders can be split by a quote line field

You can split orders by certain **shared values of the quote lines**. All you have to do is add the API name of the quote line field to the Order By picklist field.

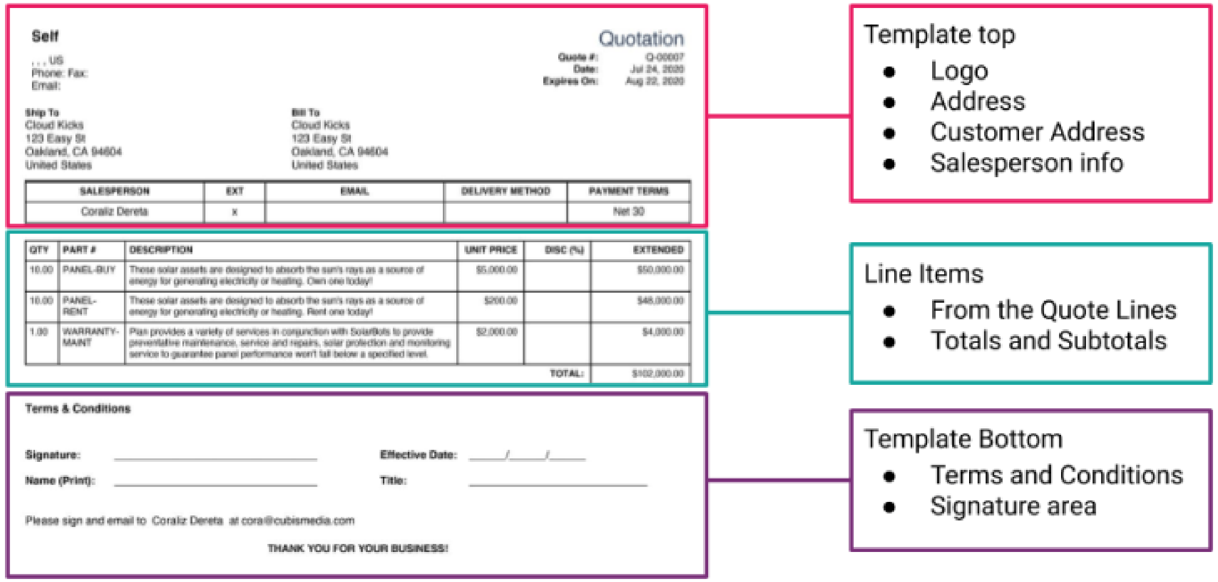
Orders can be split based on both quote line groups and other quote line fields.

If both these fields are checked, an order is generated for every combination of group and separate shared value. Thus, two groups and two Size__c values will result in four separate orders.

Salesforce CPQ Quote Document Interview Questions

What is a “quote output document” in Salesforce CPQ?

A “quote output document” in Salesforce CPQ is the PDF version of the quote that is generated from the electronic quote record. This document is typically shared with the customer and includes details such as product descriptions, pricing, terms, and conditions, and other relevant information needed to understand the offer.



What Are Quote Templates in Salesforce?

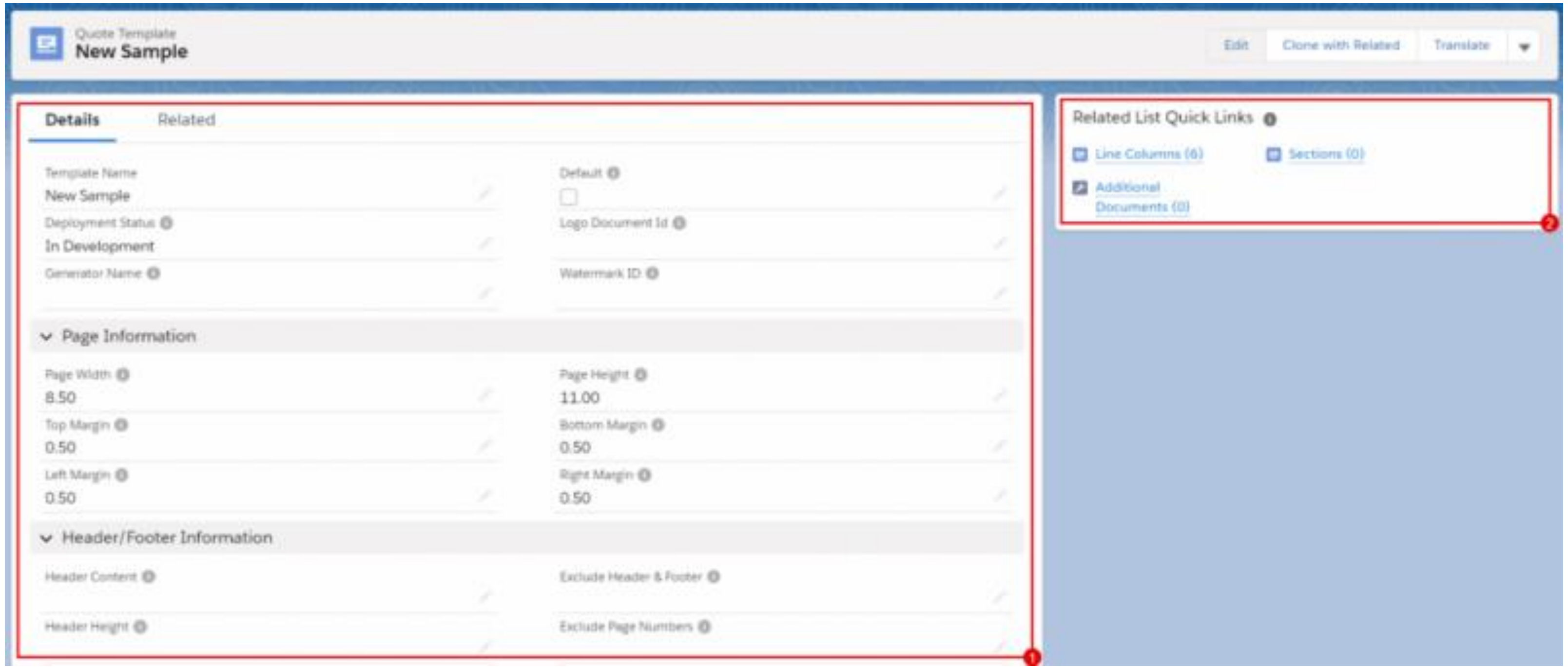
1. **Standard quote templates:** These are the default templates provided by Salesforce. They offer basic functionality and can be used to create quotes without any additional customization. They include elements like product details, pricing, terms, and conditions.
2. **Custom quote templates:** Custom templates offer a high degree of flexibility and can be tailored to specific requirements including company branding, specific fields, custom layouts, and more detailed information.

Explain quote template structure?

Quote Template Structure includes:

1. **Quote Template Information**
- Page Information
- Header/Footer Information
- Corporate Information
- Style Information
- Group Style Information
- Section Titles
- Print Options

2. **Related Lists**
- Line Columns
- Template Sections
- Additional Documents



Explain the process of generating a quote document in Salesforce CPQ?

First, ensure the “Generate Document” button is visible on the Quote object by configuring it in the Object Manager.

When ready, the sales representative clicks on “Generate Document” or “Preview Document” to create or view the quote.

PDF document is generated, which can be downloaded and reviewed.

This document includes all the configured elements, such as line items, pricing, discounts, and terms.

If any adjustments are needed, the template can be edited before finalizing the document.

What is Template Content in Salesforce CPQ, and how is it used?

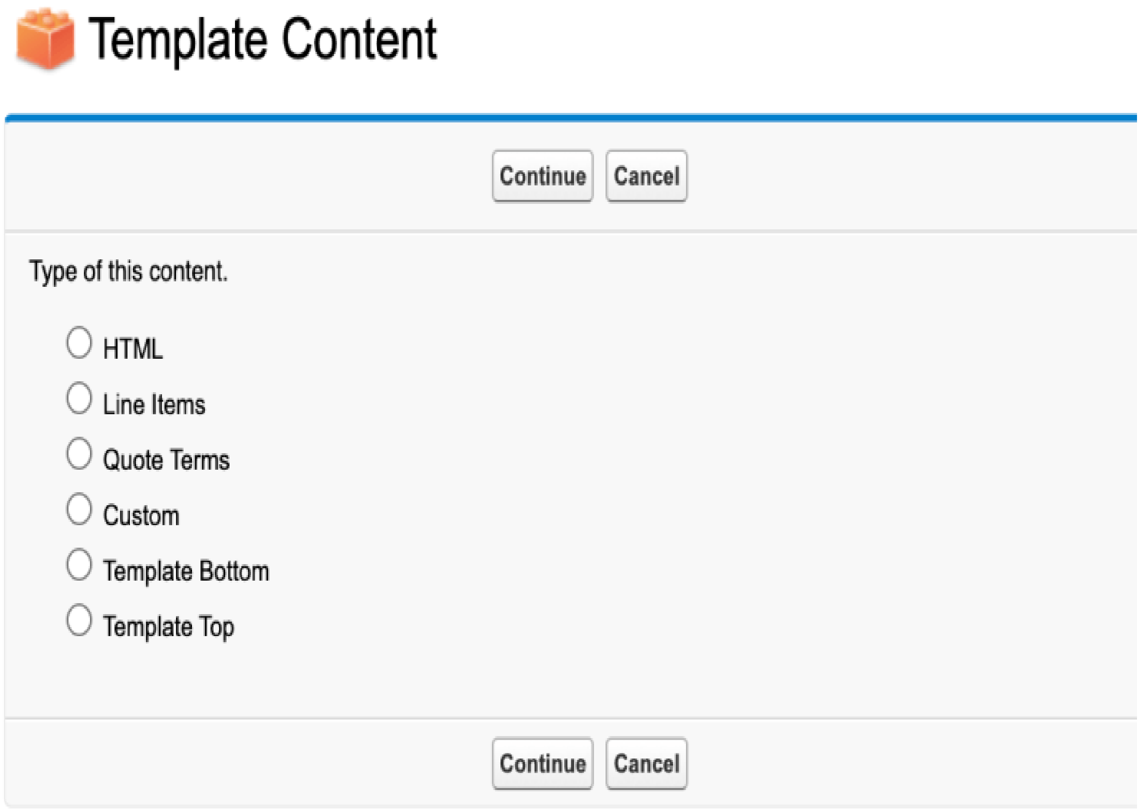
Template Content in Salesforce CPQ stores specific data or text that can be inserted into different sections of a quote. Options for content include HTML for formatted text, Line Items for quote line item tables.

How do Template Sections function in Salesforce CPQ?

Template Sections are blocks of information that contain a piece of template content. They are created by navigating to the Quote Template’s related list and adding a new section.

What options are available when creating new Template Content in Salesforce CPQ?

•HTML: Key in your own HTML.
•Line Items: Ties back to the line item columns specified in the Quote Template.
•Quote Terms: Ties back to another object called Quote Terms.
•Custom: Lets you start from scratch.
•Template Bottom: Pre-configured template bottom.
•Template Top: Pre-configured template top.



16. What is the significance of HTML in Salesforce CPQ Templates?

HTML plays a crucial role in Salesforce CPQ Templates as it allows for extensive customization and flexibility in designing quote documents. Users with HTML knowledge can create dynamic, branded, and professional-looking quotes.

18. How can you customize the columns displayed in a Salesforce CPQ Template?

Customize the columns by editing the “Line Columns” related list on the Quote Template. You can modify the column Name, Width, and the field that is displayed.

Related Details

Line Columns (6) New

Column Heading	Display Order	Width	Field Name
Product Name	10	52.00	SBQQ__ProductN...
Start Date	15	10.00	SBQQ__StartDate...
RATE	20	13.00	SBQQ__ListTotal__c
QTY	30	10.00	SBQQ__Quantity__c
AMOUNT	40	15.00	SBQQ__NetTotal_...
DESCRIPTION	50	100.00	SBQQ__Descriptio...

View All

19. Describe the process of creating and editing sections in a Salesforce CPQ Template.

1. Navigate to the “Sections” related list on the Quote Template.
2. Create a new Section and reference the “Content.”
3. If there is no existing content, click the + to create new content.

Sections (6) New

Section Name	Content	Top Margin	Bottom Margin
Template top	Template Top	0.00	0.00
Quote Line	Quote Line Items	0.05	0.00
Totals	Totals	0.10	0.00
Quote Term	Quote Term One	0.00	0.00
Quote Term Con...	Quote Term Two	0.00	0.00
Template Bottom	Template Bottom	0.00	0.00

View All

What are the primary limitations of Salesforce CPQ templates?

The primary limitations of Salesforce CPQ templates include limited flexibility and customization. While they are easy to build using preset content types like Line Items, HTML, and Custom content, these templates are restricted to pulling data only from CPQ objects unless formula fields are used. Code offers more customization but requires technical skills.

How do document generation apps enhance the functionality of Salesforce CPQ?

Document generation apps enhance Salesforce CPQ by allowing for more robust customization and automation. They enable the creation of documents that pull data from all standard and custom Salesforce objects, dynamically include or exclude content based on business rules, and offer complete styling customization. These apps can output documents in various formats and integrate with e-signature tools to streamline the sales process.

How do you use watermark on Quote Template. How you configure that?

What are the key differences between using a standard quote template and DocuSign for managing quotes?

- **Standard Quote Template:** Focuses on generating and formatting the quote document. It is primarily used for presenting information clearly and consistently, and it does not inherently include functionality for electronic signatures.
- **DocuSign Integration:** Adds functionality for electronic signatures, document tracking, and secure storage. It extends the capability of standard quote templates by enabling digital workflows, reducing paperwork, and ensuring compliance with legal requirements.

How do document generation apps support the creation of complex quotes with large numbers of line items?

Document generation apps are designed to handle large and complex documents efficiently. They can manage quotes with hundreds or thousands of line items, reducing the likelihood of running into Salesforce's governor limits. These apps also provide features for bulk processing and can dynamically adjust the document layout based on the content.

Salesforce CPQ Approval Process Interview Questions

sfdc Amplified

Why would a company choose to use Salesforce CPQ's Advanced Approval process over the standard Salesfc approval process?

1.Smart Approvals: It allows for smart approvals, which remember previously approved steps, enabling the process to skip over these steps if they are resubmitted without changes. This streamlines the approval process by not requiring repeat approvals for unchanged criteria.

2. Complex Approval Chains: Advanced Approvals can handle more complex approval workflows, including both sequential and parallel approval paths. This flexibility is useful for large organizations that need multi-level approvals from different departments.

3. User Interface and Tracking: It provides a more detailed and user-friendly interface for tracking the status of approvals, which helps users understand the approval process and where a request is currently in the process.

What are the key steps to set up Advanced Approvals in Salesforce CPQ?

1. Creating an Approver: Navigate to the Approver object, create a new approver record, and assign it to a user or a group.
2. Setting Up an Approval Chain: Create an approval chain and specify the target object (like Quote or Opportunity) and any additional objects that need to be included.
3. Defining Approval Rules: Create approval rules with specific conditions that determine when a record should be submitted for approval.
4. Configuring Approval Conditions: Set conditions that trigger the approval rule, defining the logic and criteria for the approval process.

What are “smart approvals” in the context of Advanced Approvals?

Smart approvals streamline the approval process by skipping over steps in the approval chain that have already been approved if a later step is rejected. This reduces redundancy and speeds up the approval process, ensuring that only necessary approvals are obtained.

Example : For Dell, if a quote needs approval from multiple levels (e.g., sales, finance, legal) and the finance team rejects the quote, the system automatically skips approvals from the sales and legal teams. This prevents unnecessary work and focuses on resolving the rejection.

What is the role of the “Approval Snapshot” object in Smart Approvals?

The “Approval Snapshot” object stores the original values of the tested fields when a record is submitted for approval. This snapshot is used to determine whether there have been changes in the tested fields during resubmission. If the values in the resubmitted record differ from the snapshot, the approval process may need to be revisited.

Example: In Dell’s approval process, if a quote’s discount rate is initially 10% and then increased to 20% upon resubmission, the Approval Snapshot helps determine that the change requires re-approval from relevant approvers.

How does the "Preview Approval" button function in the Advanced Approvals process?

The "Preview Approval" button allows users to see a preview of the approval path and the current status of the quote within the approval process. This preview includes which steps have been completed, which are pending, and any issues that need resolution.

What is the role of an approver group in Advanced Approvals, and how does it differ from a single approver?

An approver group in Advanced Approvals consists of multiple users who can approve or reject a request. This is useful when approvals from multiple team members are needed. The group can be set to require unanimous approval, meaning all members must approve the request, or it can be set so that only one member's approval is needed.

Example: In Dell's approval process, a "Finance Approvers" group includes all finance managers. For quotes exceeding $500,000, this group must unanimously approve the discount

How can Advanced Approvals handle both serial and parallel approval processes?

Advanced Approvals can manage serial and parallel approval processes by setting up rules that define the sequence of approvals. Serial approvals require each approver in the sequence to approve before moving to the next approver. Parallel approvals send requests to multiple approvers simultaneously, and all must approve before proceeding.

In Dell's CPQ system, high-value quotes might require serial approval starting with a sales manager, followed by parallel approvals from both the finance and legal departments.

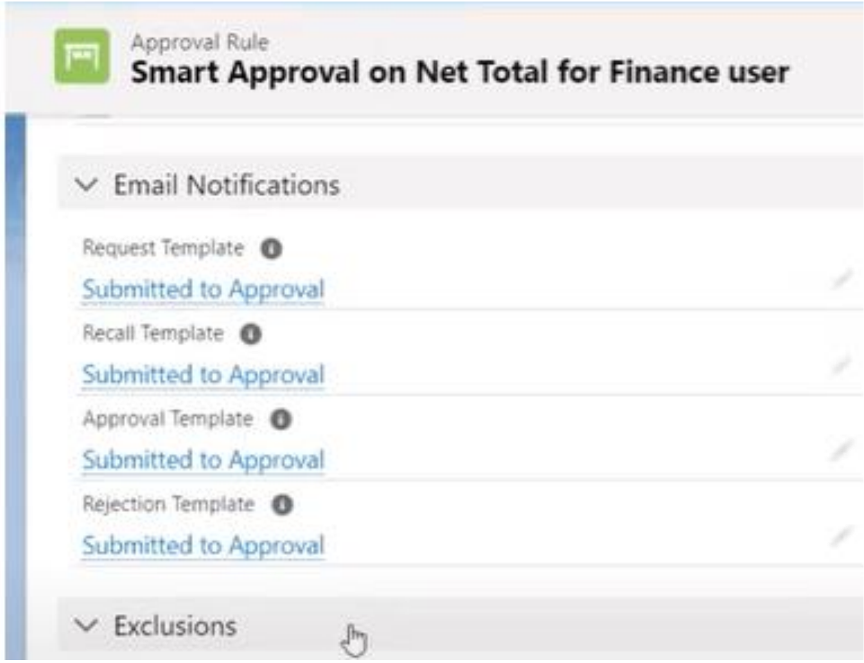
What is an Approval Chain in Advanced Approvals, and how is it structured?

An Approval Chain in Advanced Approvals is a series of approvals that must happen in a specific sequence. Each part of the chain is represented by an approval rule with a shared Approval Chain field value and an increasing Approval Step field value. This setup ensures that approvals are processed in the order specified by the steps.

The chain itself is an object with a chain name and target object. After you create the chain record, you can reference it on multiple approval rules to link them together. The Target Object field is optional, and used only if you want to quickly reference the object that the parent approval rule targets.

How are email templates used in Advanced Approvals, and what are some key considerations when setting them up?

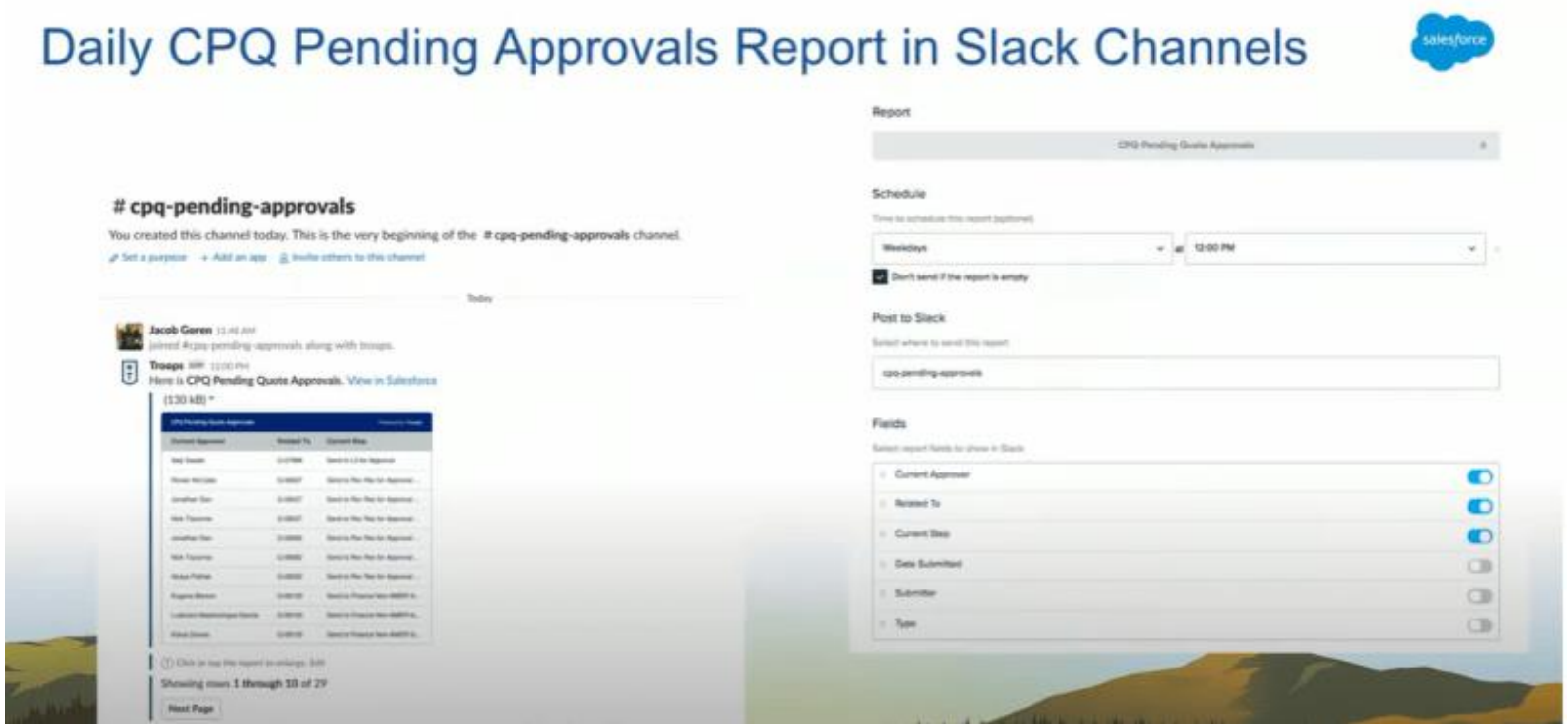
Email templates in Advanced Approvals are used to communicate the status and details of approval requests, approvals, rejections, and recalls. They are linked to specific actions in the approval process and are customized using Visualforce or other template formats.



The types of email templates used in Advanced Approvals include:
Approval Request Template: Sent to approvers when an approval is needed.
Approval Response Template: Sent to the requester when an approval is granted.
Rejection Response Template: Sent to the requester when an approval is denied.
Approval Recall Template: Sent when an approval request is recalled for revisions.

How does integrating Salesforce CPQ with other systems can enhance the approval process?

Let’s say we integrate Salesforce CPQ with Slack. Integrating Salesforce CPQ with Slack enhances the approval process by enabling real-time collaboration and communication. It allows team members to approve deals, ask for clarifications, and share relevant deal information in a centralized Slack channel.



Salesforce CPQ
Contract Interview Questions

What is the function of the ‘Contracted’ checkbox in Salesforce CPQ?

Contracts formalize agreements between the company and the customer

The ‘Contracted’ checkbox, when selected, triggers the creation of a contract from the order. This contract formalizes the agreement between the company and the customer, outlining the terms, conditions, and obligations for both parties. It serves as a legal document that ensures both parties are aligned on the agreed terms.

What are the necessary conditions to create a contract from an opportunity in Salesforce CPQ?

1. Opportunity Requirements:

- The opportunity must have an account associated with it to determine the customer.
- There should be a primary quote associated with the opportunity, which identifies the quote lines that will generate subscriptions.
- The opportunity must have the close date and stage field populated.

2. Quote Requirements:

- The primary checkbox on the quote must be set to true.
- The quote must have a start date and either an end date or a subscription term to ensure correct pricing.
- The quote must include subscription products, with at least one quote line having the subscription pricing field set to “Fixed Price” or “Percentage of Total.”

3.Contract Generation Trigger:

The contracted checkbox on the opportunity record must be checked to trigger the creation of the contract.

What is the importance of activating an order before creating a contract in Salesforce CPQ?

Activating an order is a crucial step before creating a contract because it finalizes the order’s details and confirms that the products and services are ready for delivery or fulfilment. Without activating the order, the information may still be subject to changes, leading to inconsistencies in the contract.

When should a 'Contract-Based' renewal model be used?

A 'Contract-Based' renewal model should be used when a company sells subscription products and needs to maintain detailed records of their terms, such as start and end dates. This model is ideal for managing renewals based on contract timelines.

How does the ‘Subscribed Asset’ record function in Salesforce CPQ?

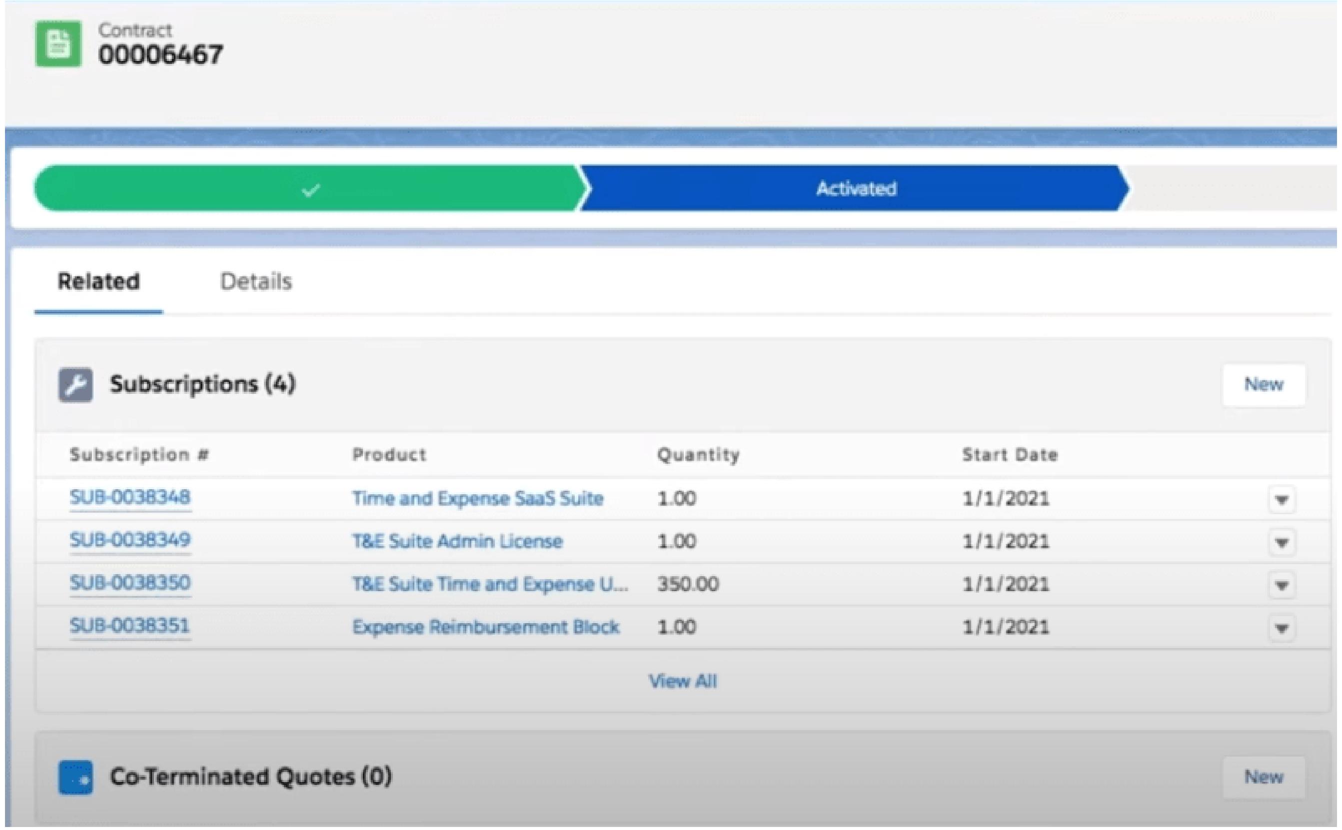
The ‘Subscribed Asset’ record acts as a junction object linking an asset (such as hardware) with a covering subscription (like a maintenance plan). This record helps track the relationship between physical products and their associated service contracts.

Why is it important to track both assets and subscriptions in Salesforce CPQ?

Tracking both assets and subscriptions is important because they represent different aspects of the customer’s engagement. Assets track ownership and physical details, while subscriptions manage billing cycles and renewals.

Why are only ‘Subscriptions’ are shown but Assets not shown as related list of contracts?

Assets are only one time purchase so they are not added to contracts.



Explain Contract Start Date and Contract End Date?

- *Contract Start date* will be the start date that was selected on your quote. If your quote did not have a start date, no contract is generated.
- *Contract End Date* will be calculated from your contract start date + subscription term

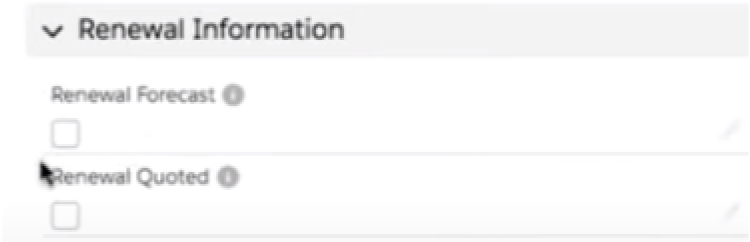
Salesforce CPQ
Contract Renewal Interview Questions

How do renewals and amendments work in Salesforce CPQ?

A renewal is when a customer decides to continue their contract after it ends.
An amendment is when you change something in the contract while it’s still going on

Can you discuss the standard process for creating and managing a renewal in Salesforce CPQ?

So, imagine a customer's contract is about to end, and we want them to continue using our service. In CPQ, we create a "renewal opportunity" which is like a reminder that we need to get them to sign up again. Then, we make a "renewal quote" with all the pricing info. We can change things if we need to, like the price or what's included. Once everything looks good, and the customer agrees, we update the contract to show they're staying with us.



How does Salesforce CPQ handle pricing changes for renewal opportunities, and what options are available?

Salesforce CPQ handles pricing changes for renewal opportunities through the Renewal Pricing Method field on the account record and the Renewal Uplift Percent field on the quote record. The available options include:

Same – This will take the same price, including discounts, from the original Opportunity and apply them to the Renewal Opportunity /Quote at the time of creating the Renewal. Meaning if you had a list price of 100 and then gave a 10% discount and it was sold for $90, then on Renewal Quote, you will see the same values flow through. Note that this discount is only on the customer price and does not take into account Partner or Distributor discounting.

List – It takes the List price of the Product based on the Pricebook in used in the Original Opportunity unless you have noted a Renewal Pricebook ID on the Contract, in which case it will take that List Price. There will be no flow-through of Discounts if this option is selected.

Uplift – This is the only option that requires additional setup if you choose to use it. Uplift is for when you want to take your Customer price and add some percentage of increase on the Renewal Quote. In addition to marking the field on the Account, you will need to set the Renewal Uplift Rate at either the Subscription or Contract level. If both are set, the Subscription takes precedence over the Contract.

What does it mean if the asset conversion field for a product is set to “none”?

If the “asset conversion” is set to “none,” it means that when the product is sold, it won’t be turned into an “asset” record in the system. It’s like saying, “We don’t need to keep long-term track of this product as a permanent item for the customer.”

What is the ‘Renewal Model’ field in Salesforce CPQ, and what does it control?

Renewal Model’ field in Salesforce CPQ determines how the system tracks and manages renewals for products sold. It can be set to either ‘Contract-Based’ or ‘Asset-Based,’ influencing whether renewals are tracked through contracts or asset records.

Salesforce CPQ Contract Amendment Interview Questions

What records does Salesforce CPQ create when you initiate an amendment?

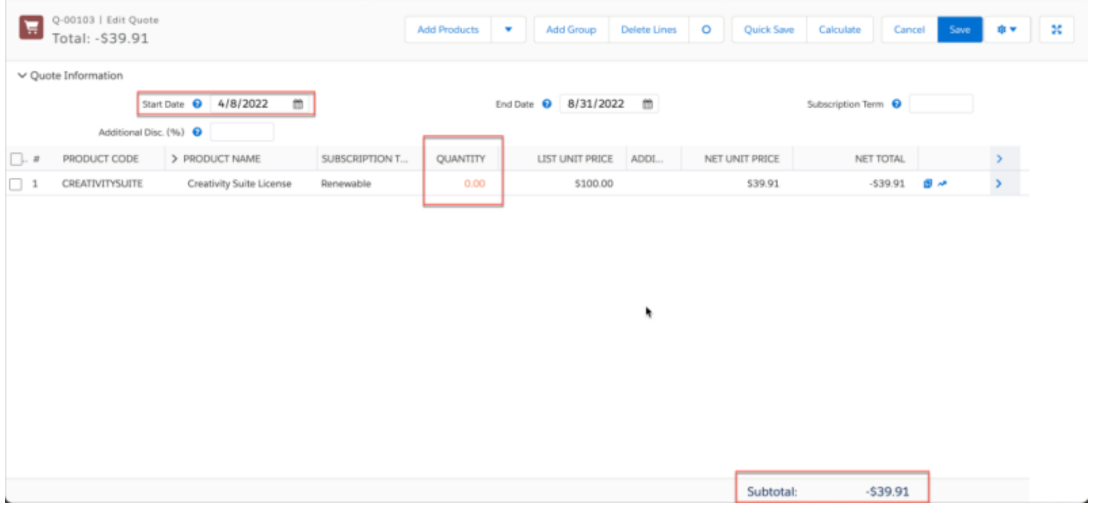
Salesforce CPQ creates an amendment opportunity with a close date equal to your contract’s start date and an amendment quote with start and end dates matching your contract’s terms. The opportunity and quote will include specific naming conventions and details reflecting their nature as amendments.

How to cancel a contract?

To properly cancel a contract, you need to do an amendment action in which you zero out all of the Quote Lines on the Contract.

Your Contract will end up with new negative lines for all items churned; however, there will be no indicator on the Contract that it has been terminated.

The Subscription Lines will have a Terminated Date of the date you cancelled everything.



What’s the difference between ‘Co-Terminated Quotes’ and regular quotes in Salesforce CPQ?

‘Co-Terminated Quotes’ are special because they’re used when we make changes to a contract that’s already going on. Regular quotes are just the usual offers we make to customers.

Can you change the pricing of existing products during the amendment process?

No, you can’t change the pricing of existing products; you can only modify quantities or add new products.

How does Salesforce CPQ handle price changes for new products added during an amendment?

During an amendment, Salesforce CPQ allows for new products to be added to the existing contract. For these new products, users can set prices and apply discounts independently from the original products in the contract. The pricing for these new additions is based on the standard price book or any negotiated prices. Unlike existing products, where prices and discounts are locked, new products can have flexible pricing adjustments.

Can you explain the process of transferring assets during an amendment in Salesforce CPQ?

In Salesforce CPQ, if a customer wants to move a service from one contract to another, I use the ‘Amend’ feature to move it, making sure it’s removed from the old contract and added to the new one.

Can we change discount on the amendment line? Consider I have one new business quote where we added 20% discount. Earlier it was 100 quantity and now we change to 200 quantity so now we want to put discount to 25% can we change the discount using amendment?

Customer purchase 1000 quantity. The customer purchases additional 1000 quantity in next two years. How you setup in your system?

Salesforce CPQ Automation Interview Questions

How can the naming convention of renewal opportunities be customized in Salesforce CPQ?

In Salesforce CPQ, the default name for renewal opportunities is typically “Renewal Opportunity.” However, this can lead to confusion with multiple opportunities having the same name. To customize the naming convention, businesses can automate the naming process using Salesforce’s automation tools, to generate more meaningful names. This could include incorporating elements like the account name, contract number, or specific renewal terms into the opportunity name.

Describe the process of automating the contract creation from an opportunity in Salesforce CPQ.?

Automating contract creation involves setting up conditions that trigger the process when certain criteria are met. This can be done using Salesforce automation tool. Typically, automation can be based on:

Setting the “Contracted” checkbox on the opportunity or order record, which triggers the creation of a contract. Automatically setting the stage of an opportunity to a specific stage (e.g., “Closed Won”) can be another trigger point.

Salesforce CPQ
Project Related Questions

Define a CPQ project you have worked on and the CPQ tools you used?

Project Overview: I worked on a CPQ implementation project for a company that provides therapy services to students. The goal was to streamline the sales process, automate pricing and discounting, and improve the accuracy of quotes and contracts.

Products offered

One-Time Services: Initial Consultation – Price: $100 per session

Specialized Assessments: Psychological Assessment, Cognitive Evaluation. Price**:** $250 per assessment

Workshops and Educational Mindfulness Workshop, CBT Skills Training. $150 per session

Subscription-Based Services:

- Monthly Therapy Plans
- Annual Therapy Memberships
- Wellness Packages

Bundled Services:

- Family Therapy Bundle: Discount: 20% off family sessions

Salesforce CPQ
Advance Interview Questions

There is an account which does not have contracted pricing. Now we create quote and add a product worth $1000 with 20% additional discount making net price as 800. Now we want that price to automatically go into contracted price. How to do that?

If we want to create contracted pricing automatically for the FIRST TIME.. when we dont have earlier existing on account - From a quote. select a value for the Generate Contracted Price field. Use PRICE

- 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. Other Options are -
- Discount Schedule:
- Do Not Generate: Salesforce CPO doesn't create a contracted price for this product

If there is an account which already has contacted price for a product, can we automatically create a contracted price for same account again?

- If a product is already contracted and contract price is added, you cannot create another contracted price automatically. You can do it manually. You will get this mail from salesforce if you try to create duplicate contracted price under same Account.

I have a summary variable that returns count of quote lines. I want to multiple the count by 5. How can I achieve that?

By using the composite field on summary variable. It has values add, subtract , multiply, divide

Create summary variable
& Composite information
Composite operator - Multiply
Variable Element - the same summary variable
Value element - 5

Let's say a customer has an existing contract with a 20% discount on a product, which has been set up as contracted pricing. The business wants to make sure that every time this customer renews their contract for the same product, the 20% discount is automatically applied, without any manual adjustments.

How can we automate the process so that when the contract is up for renewal, the system automatically applies the 20% discount to the renewal quote?

We need to set up a T-Mobile Data Plan Subscription product for a 1-year term. If the customer opts for a longer subscription, such as 3 years, the following discount structure will apply:
First Month: Free
Second Month: 5% Discount
Remaining at Original Price
How to achieve that?

We have some bundled product which is frequently used and we want to control visibility of it at very top. How to do that?

A product is sold for $100, now we want to give a discount to a particular partner of 5%. How can we set that up using CPQ?

Let's say the customer has a ***Zomato Gold membership***
Scenario 1: He gets a 30% **discount on EVERY menu item** in the quote line if he has the membership
Scenario 2: He gets **Buy** 1 **get** 1 **Free dessert** i.e. if a customer buys 1 dessert, he gets another dessert for free with the membership

if the customer has a ***Zomato Silver membership***
Scenario 3: He gets a 10% **discount on the TOTAL** of menu items in the quote

How do we achieve that in Salesforce CPQ?

What are the limitations on Salesforce CPQ?

For the usage-based product, Salesforce does not track usage. For that, we need to integrate with an external system to track usage.

2. If we want that a particular field needs to hidden / not editable on QLE based on a particular condition we cannot achieve using standard CPQ features, we need to Opt for QCP.

If a customer wants that in QLE if user adds 2 quantities of Iphone Product then the system should create 2 assets instead of 1 then how to achieve that?

How to add Product Image to QLE?

What are limitations of Twin Fields?

Twin Fields Work Only at Record Creation: When a record is first created, Twin Fields will automatically sync the values from the source object (like Product) to the target object (like Quote Line).

No Automatic Sync on Updates: If you update the source field after the initial record creation, the target field does not automatically update. Continuous updates require additional automation

One-Way Mapping: It means the value flows from the Product to the Quote Line but not the other way around.

Limited to Specific Objects: Twin Fields work only between certain predefined objects in Salesforce CPQ. You can find the list of supported objects in the Salesforce Help documentation

The customer goes to PVR and chooses to take Fountain Drink. He gets 3 options:
Fountain Drink Small - $2.20
Fountain Drink Medium - $2.40
Fountain Drink Large - $2.60

Fountain Drink available are Coke, Diet Coke, Fanta, Sprite

How to Set this product configuration in CPQ.
Note: We DON'T WANT to create many products like 1 for Fountain Drink Small, 1 for Fountain Drink Large, 1 For Coke, 1 for Pepsi, etc.How with minimum product creation and CPQ configuration we can achieve this.

On the Quote object, we have an "Edit Line" button, and there are two record types—Quote and Locked. We have to configure the fields shown in the Quote Line Editor based on the record type. For the "Quote" record type, only 5 fields should be visible. For the "Locked" record type, only 3 fields should be visible in the columns, quote lines, and headers.

How would you approach this configuration? What steps would you take to make sure the correct fields are displayed based on the record type?