

## Exercise 1: Locate Existing Information

### Scenario



It's day one of the Industries CPQ go-live at Infiwave, and Sophia and her sales team are excited to get hands-on with their new quote-and-order application. To start, they're given some time to explore Industries CPQ. Sophia asks her team to locate some key accounts, quotes, and orders for customers.

### Goals

- Locate and update account information
- Find and review opportunities, quotes, and orders for your customers
- Use the asset viewer to review assets associated with an account

### Tasks

1. Set up your Industries CPQ navigation tab
2. Add a new contact for the Acme Alameda office
3. Check opportunity, quote, and contract details for Acme
4. Review the configuration of a service on Carole White's account

Time: 15 mins



**NOTE:**

Completing your learning with Trailhead? This exercise relates to the Industries CPQ Order Capture Process badge. Ensure you've completed this badge before you undertake Exercise 1.

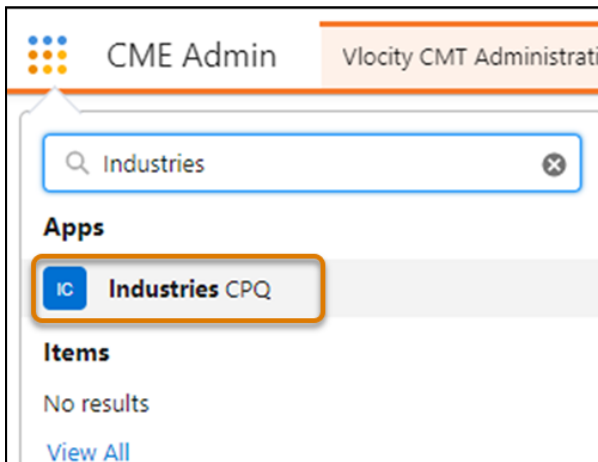
## Task 1: Set up your Industries CPQ navigation tab

This is the first time Sophia's used Industries CPQ, so she needs to work out how to open the application in Salesforce, then set up the Industries CPQ navigation tab to include all the workspaces she'll need.

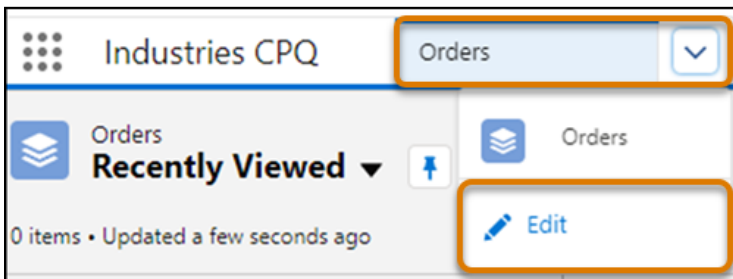
1. Start by opening the Industries CPQ application. Click the **Lightning App Launcher**



then search for and select **Industries CPQ**.

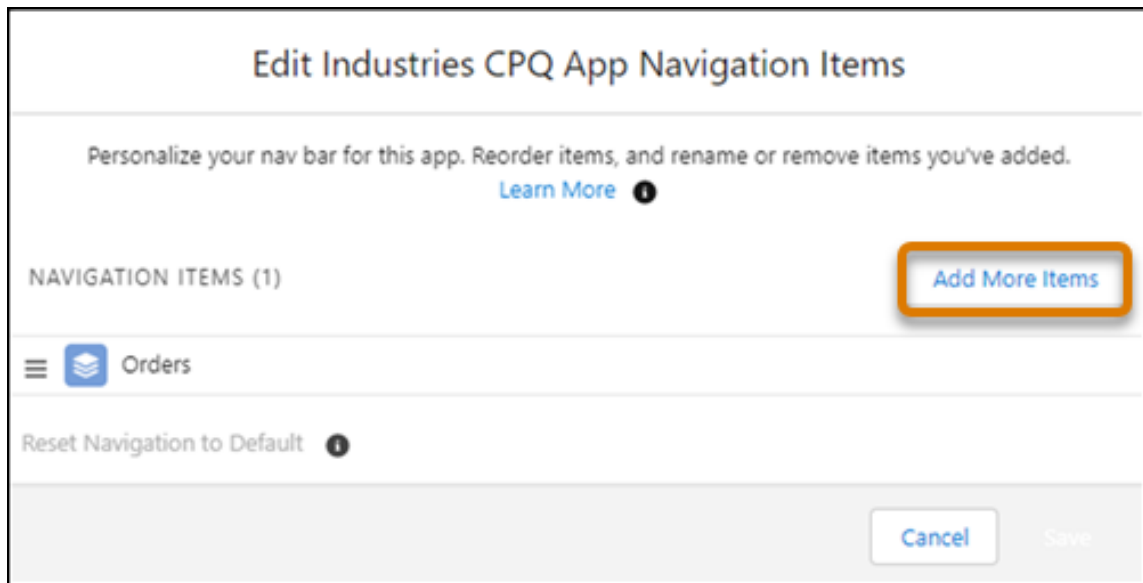


2. The first time you use Industries CPQ, you'll need to set up the navigation tab with the workspaces you're most likely to use. (This is a one-off task: once it's done, you'll be able to access the workspaces whenever you need them.)

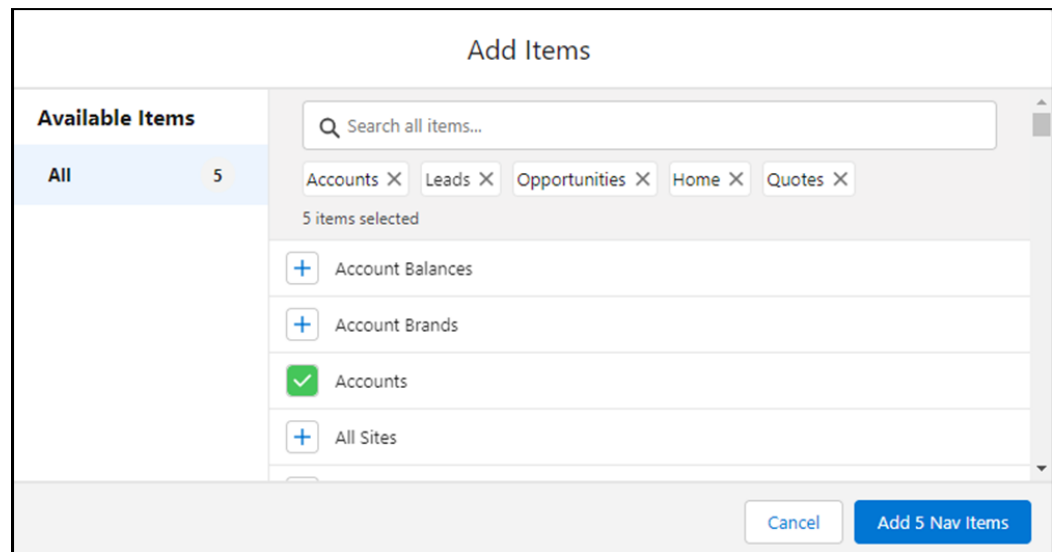


- a. Click the **navigation tab menu**. At present it has only the Orders workspace for selection.
- b. Click **Edit** to edit the navigation tab menu.


3. Add the required workspaces to the navigation tab menu.

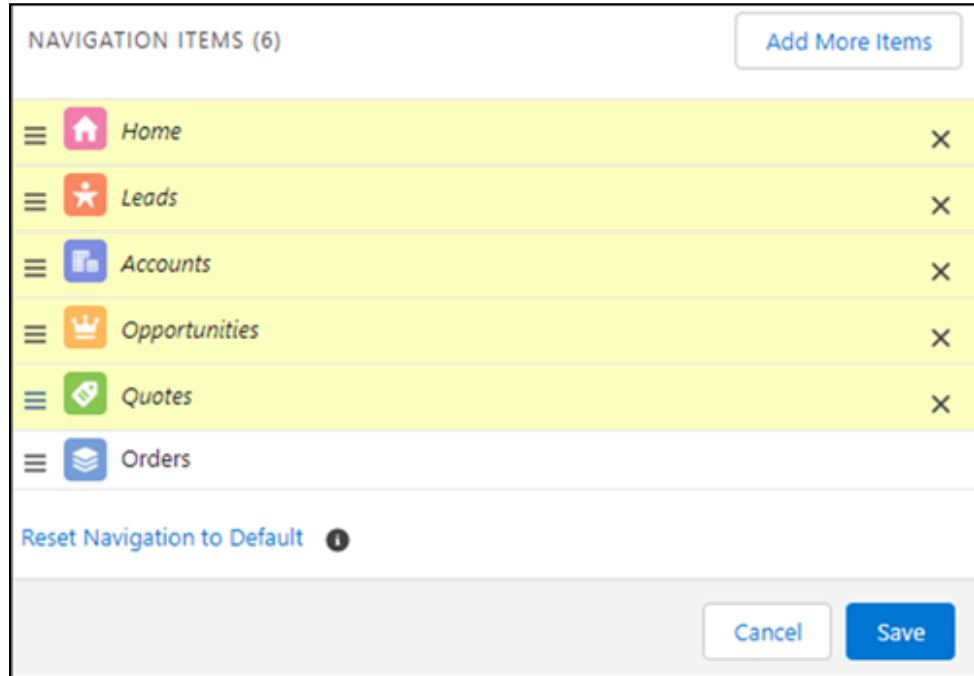


- a. Click **Add More Items**.



- b. Click the + beside **Accounts, Leads, Opportunities, Home, and Quotes** to select those workspaces to add to your navigation tab.
- c. Click **Add 5 Nav Items**. Your items are added to the menu.

- d. Move the navigation menu items into a logical order. Drag the item by its associated move icon  to its new position. We recommend this sequence:



- e. Once you're done, click **Save** to save your changes. (If you cancel at this point your navigation menu will revert to the original, with just the Orders workspace featured.)

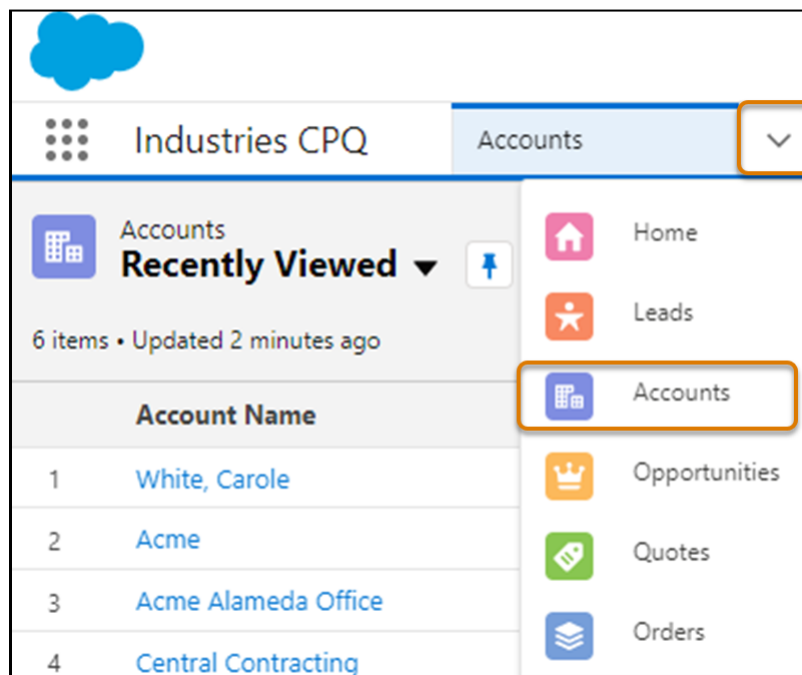
## Task 2: Add a new contact for the Acme Alameda office

Sophia's been asked to add Dr Sai Grover, the Purchasing Manager of Acme, who is based in the Acme Alameda office, as the contact for the Acme Alameda office. Sai's phone number is 206-555-0177 and their email is [sai.grover@acmeisthebest.com](mailto:sai.grover@acmeisthebest.com).

Sophia's also required to check that all Acme offices are associated with the account.

How many offices are associated with the Acme account?

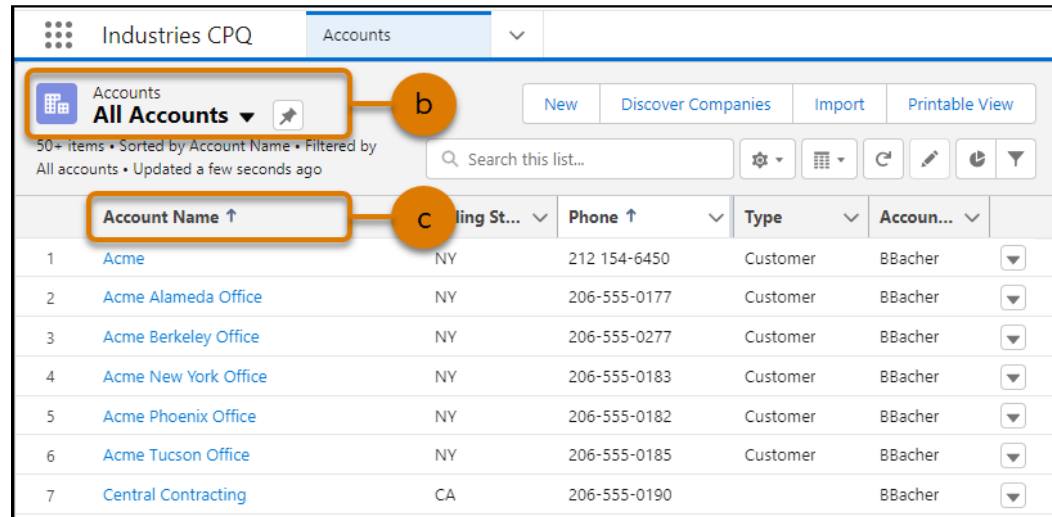
1. This information is stored on the Acme account, so start by opening the Acme account in Industries CPQ.
  - a. In **Industries CPQ**, click the navigation menu and select **Accounts**.



The screenshot shows the Industries CPQ interface. At the top, there is a navigation bar with the text "Industries CPQ" and a dropdown menu currently showing "Accounts". Below this, a sidebar menu is visible with several options: Home, Leads, Accounts (highlighted with an orange box), Opportunities, Quotes, and Orders. The main content area displays a list of accounts under the heading "Accounts Recently Viewed". The list contains four entries:

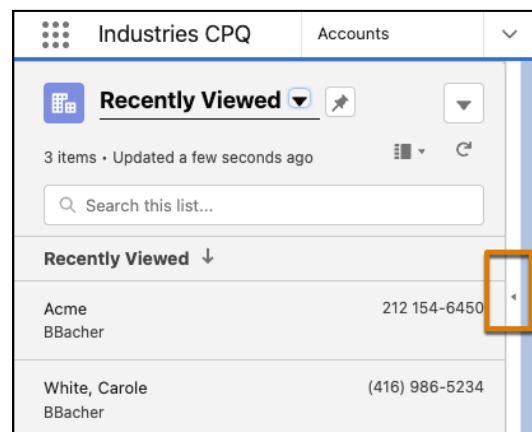
	Account Name
1	White, Carole
2	Acme
3	Acme Alameda Office
4	Central Contracting

- b. In the Accounts list click **Recently Viewed** and change the list view to **All Accounts**. Click the **pin icon** to make All Accounts your default account list view.
- c. Click **↓** beside the **Account Name** list heading to sort the accounts list in descending order by account name. Acme should be the first account on your list.



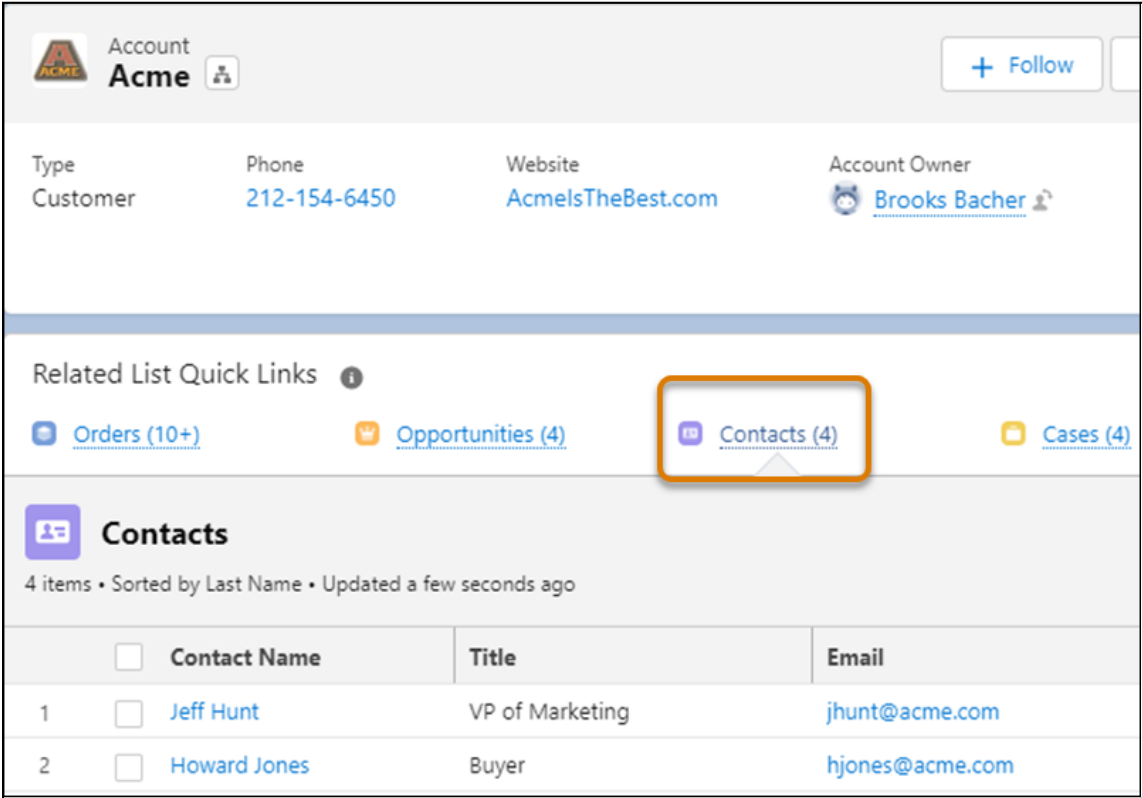
	Account Name ↑	Accounting St...	Phone ↑	Type	Account...
1	Acme	NY	212 154-6450	Customer	BBacher
2	Acme Alameda Office	NY	206-555-0177	Customer	BBacher
3	Acme Berkeley Office	NY	206-555-0277	Customer	BBacher
4	Acme New York Office	NY	206-555-0183	Customer	BBacher
5	Acme Phoenix Office	NY	206-555-0182	Customer	BBacher
6	Acme Tucson Office	NY	206-555-0185	Customer	BBacher
7	Central Contracting	CA	206-555-0190		BBacher

- d. Click **Acme** on the list to open the Acme account record.
- e. You're currently viewing the Accounts list in a split view. Split view shows a list of accounts on the left then, once you open an account, the open account details on the right. Let's simplify things by collapsing the split view. Click the **◀** on the pane divider to hide the split view and show the account list as a full pane.



Recently Viewed ↓	
Acme BBacher	212 154-6450
White, Carole BBacher	(416) 986-5234

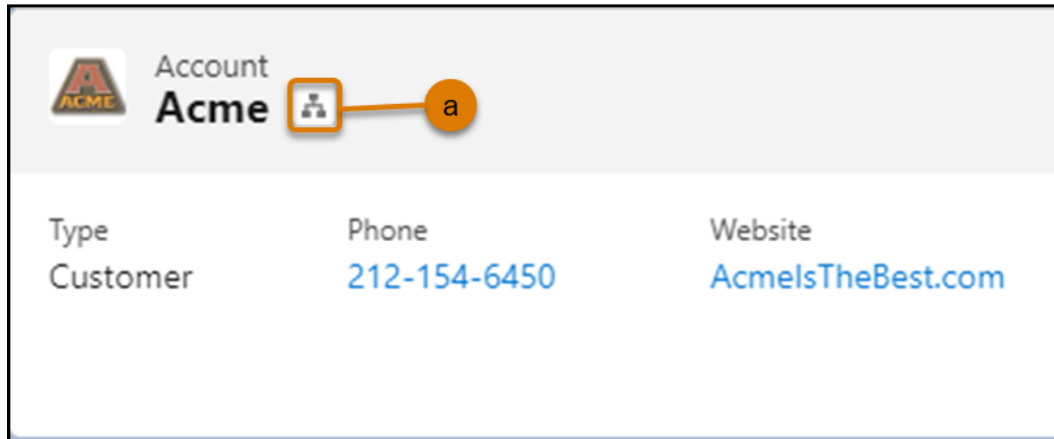
- 2. Now that the Acme account is open, your next step is to add Sai as a contact to the Acme Alameda office. First, let's check if Sai is already a contact at Acme. Hover over the contacts quick link at the top of the Acme account record. Is Sai in the Acme contacts list?



The screenshot shows the Salesforce interface for the 'Acme' account. At the top, there is an 'Account' header with the Acme logo, name, and a '+ Follow' button. Below this, account details are listed: Type (Customer), Phone (212-154-6450), Website (AcmeIsTheBest.com), and Account Owner (Brooks Bacher). A 'Related List Quick Links' section contains four links: 'Orders (10+)', 'Opportunities (4)', 'Contacts (4)', and 'Cases (4)'. The 'Contacts (4)' link is highlighted with an orange box. Below the quick links, a 'Contacts' section is displayed, showing 4 items sorted by Last Name, updated a few seconds ago. A table lists the contacts:


	<input type="checkbox"/> Contact Name	Title	Email
1	<input type="checkbox"/> Jeff Hunt	VP of Marketing	<a href="mailto:jhunt@acme.com">jhunt@acme.com</a>
2	<input type="checkbox"/> Howard Jones	Buyer	<a href="mailto:hjones@acme.com">hjones@acme.com</a>

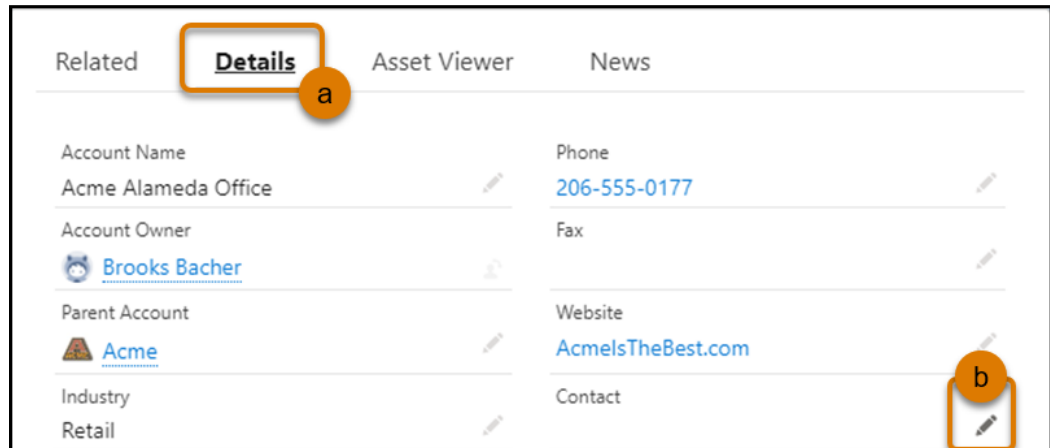
3. Sai's not on the Acme main contacts list. Let's check if they're a contact for the Acme Alameda Office. Start by opening the Acme Alameda Office account record.
  - a. Click **View Account Hierarchy** to see all the service and billing accounts associated with the Acme account. A new tab is opened.



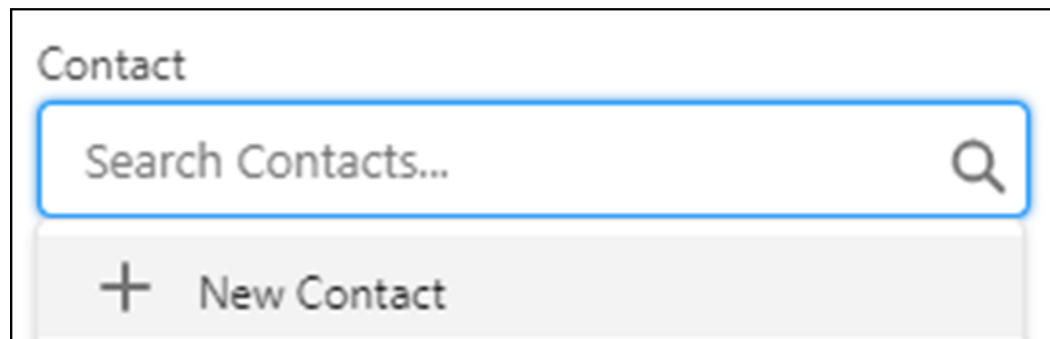
- b. How many offices does Acme have? Make a note of the number of offices in the box at the start of this task.
    - c. From this list of Acme accounts, click **Acme Alameda Office** to open the service account record for the Alameda office. Note that it opens as a new tab in the Acme account workspace.



4. Add Sai Grover as a new contact to the Acme Alameda Office.
  - a. Click **Details** to open the Details tab on the Alameda office record.
  - b. Click the edit icon  beside the contact name to edit the contact.



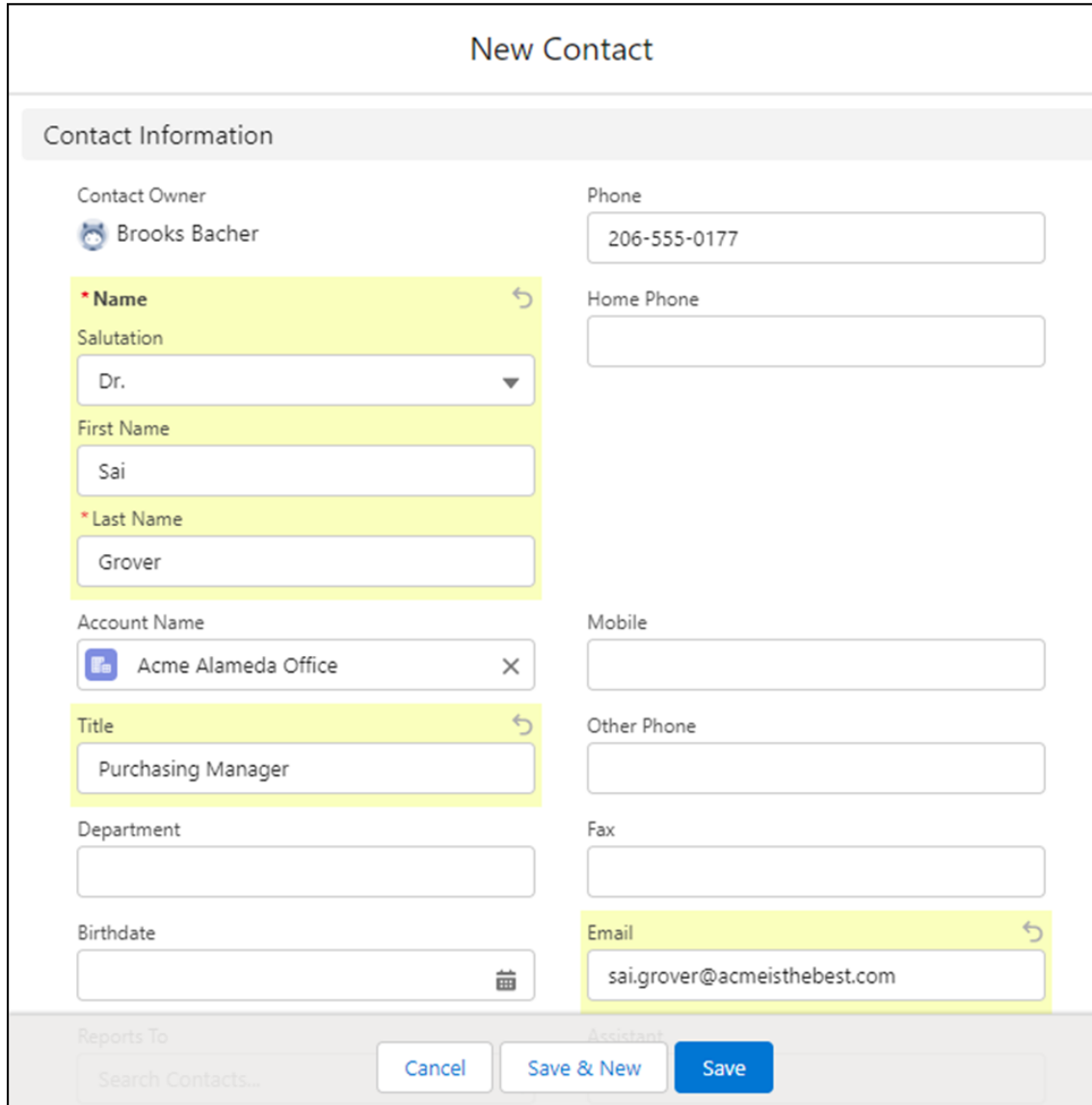
- c. First let's check if Sai's already a contact for this office. Click in the **Contact** field and type Sai, then select **Show All Results for "Sai"**. No contact is found.
- d. Close the search.
- e. Time to add Sai as a contact for the Alameda office. Clear "Sai" from the search box and select **+ New Contact**.



- f. Add Sai Grover's contact information, as shown here.

Field	Value
Salutation	Dr
First Name	Sai
Last Name	Grover
Phone	206-555-0177
Account Name	Acme Alameda Office
Title	Purchasing Manager
Email	sai.grover@acmeisthebest.com

Your contact form should look like this - although you may not have the yellow highlights on it:



**New Contact**

Contact Information

Contact Owner  
Brooks Bacher

Phone  
206-555-0177

\* Name  
Salutation  
Dr.

Home Phone

First Name  
Sai

\* Last Name  
Grover

Account Name  
Acme Alameda Office

Mobile

Title  
Purchasing Manager

Other Phone

Department

Fax

Birthdate

Email  
sai.grover@acmeisthebest.com

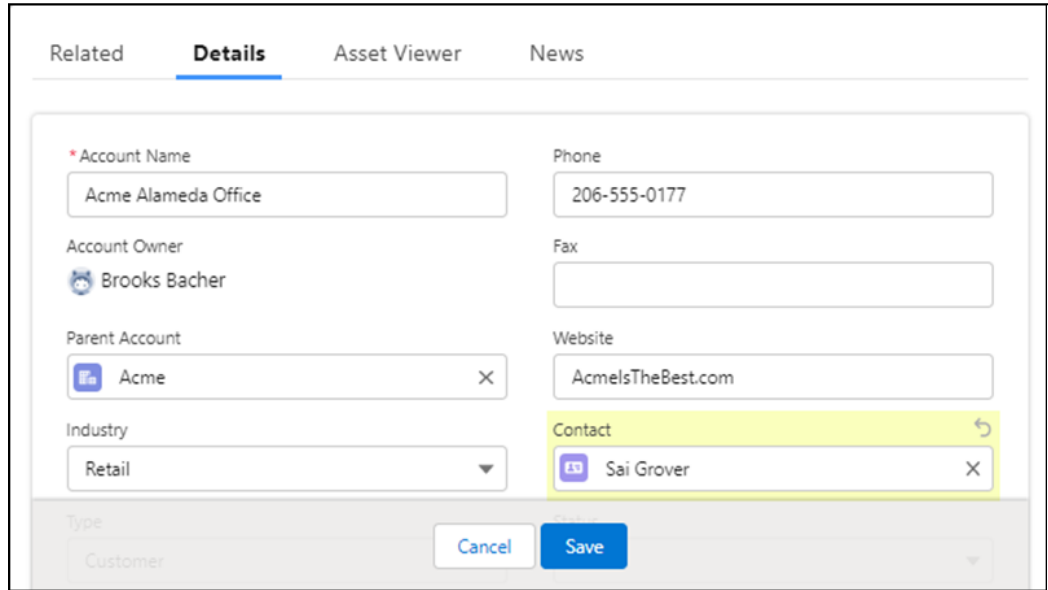
Reports To  
Search Contacts...

Assistant

Cancel Save & New Save

- g. Click **Save** to save the contact record and return to the Alameda office account record.

- h. Notice the Contact field contains Sai's contact information. Click **Save** to save the contact details on the account record.

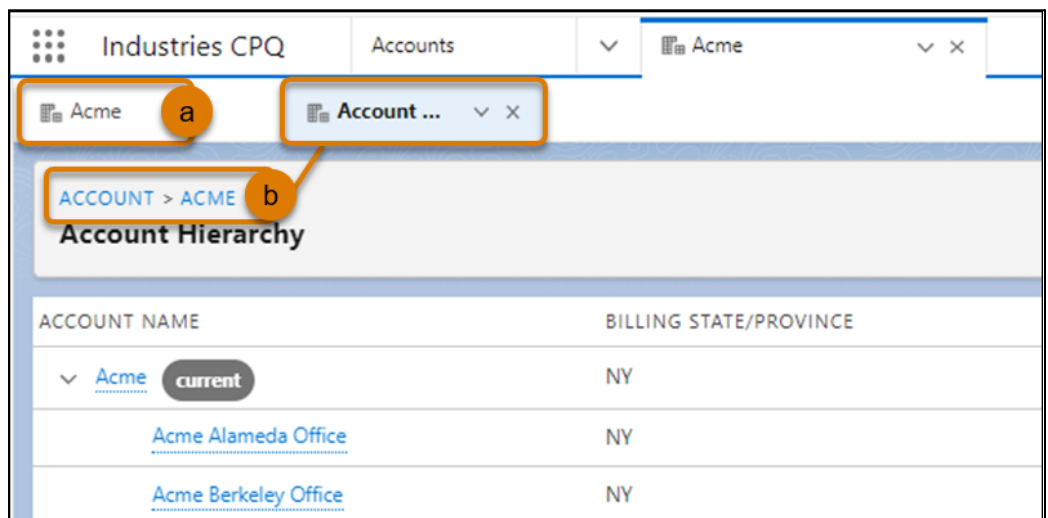


The screenshot shows the 'Details' tab of an account record in Salesforce. The form contains the following fields:

- Account Name: Acme Alameda Office
- Account Owner: Brooks Bacher
- Parent Account: Acme
- Industry: Retail
- Phone: 206-555-0177
- Fax: (empty)
- Website: AcmeIsTheBest.com
- Contact: Sai Grover (highlighted in yellow)

At the bottom, there are 'Cancel' and 'Save' buttons.

- 5. Click **X** on the Acme Alameda Office account record tab to close the record view. To return to the main Acme account record, either:
  - a. Click the **Acme** account record tab; OR
  - b. Click **Acme** in the breadcrumb trail at the top of the account hierarchy to return to the main Acme customer account record.



The screenshot shows the account hierarchy in Salesforce. The breadcrumb trail at the top reads 'ACCOUNT > ACME', with 'ACME' highlighted. Below this, the 'Account Hierarchy' table is displayed:

ACCOUNT NAME	BILLING STATE/PROVINCE
Acme <b>current</b>	NY
<a href="#">Acme Alameda Office</a>	NY
<a href="#">Acme Berkeley Office</a>	NY

### Task 3: Check opportunity, quote, and contract details for Acme

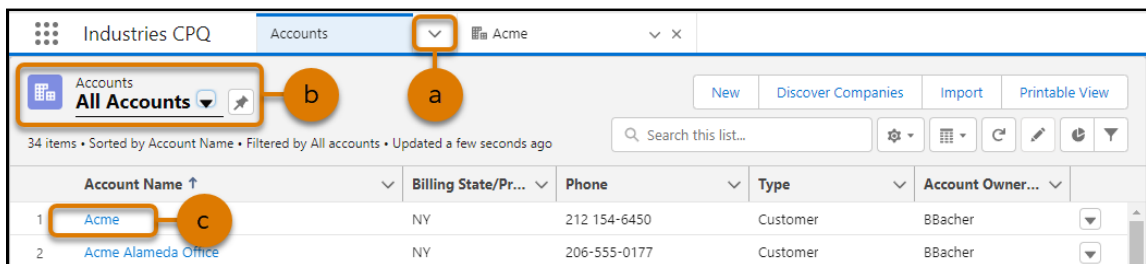
Sophia takes a call from Sai from Acme. Sai wants to check the pricing on a quote created recently for protection of equipment as part of the Acme office upgrade.

Sophia makes a note of the details of Acme's protection plan:

Duration:       Original One-Time Charge:       Recurring Charge:

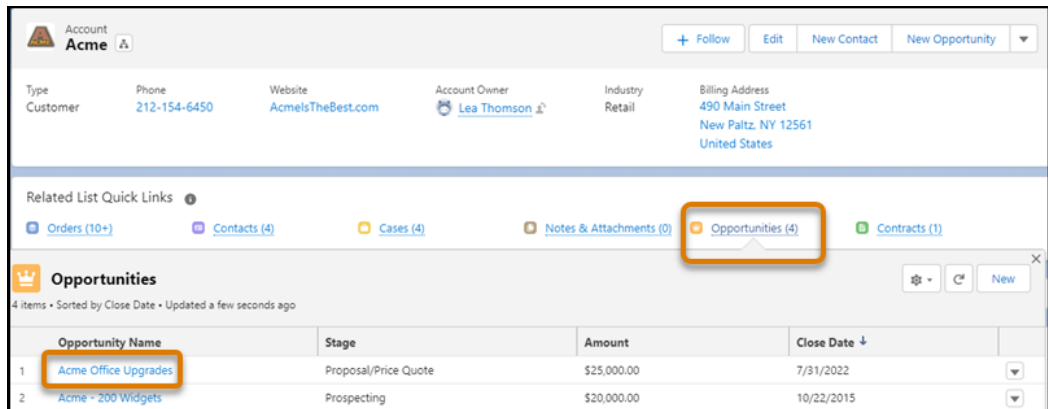
Sai also wants to check if there are currently any active contracts between Acme and Infiwave.

1. If you don't already have it open, you'll need to open the Acme account record.



- a. Select **Accounts** from the navigation menu to view the accounts list.
- b. Check you have **All Accounts** selected as the list view.
- c. Click **Acme** in the accounts list to open the Acme account record.

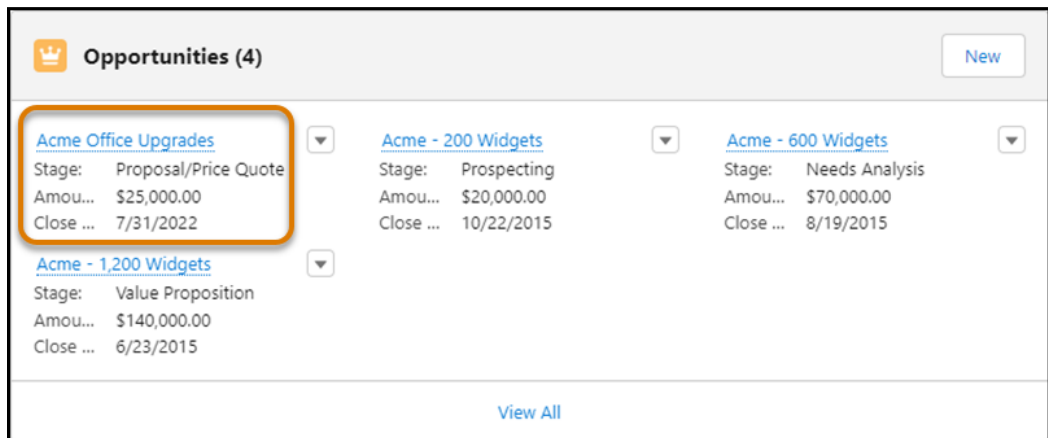
2. There are two ways to locate the Acme Office Upgrades opportunity on the Acme account:
  - a. Hover over the **Opportunities** quick link at the top of the Acme account record, as shown here, then select **Acme Office Upgrades** from the Opportunities list.



The screenshot shows the Acme account record in Salesforce. At the top, there are quick links: + Follow, Edit, New Contact, and New Opportunity. Below this is a summary section with fields for Type (Customer), Phone (212-154-6450), Website (AcmeIsTheBest.com), Account Owner (Lea Thomson), Industry (Retail), and Billing Address (490 Main Street, New Paltz, NY 12561, United States). A 'Related List Quick Links' section contains icons for Orders (10+), Contacts (4), Cases (4), Notes & Attachments (0), Opportunities (4), and Contracts (1). The 'Opportunities (4)' link is highlighted with a red box. Below this is a table of opportunities:

Opportunity Name	Stage	Amount	Close Date
<a href="#">Acme Office Upgrades</a>	Proposal/Price Quote	\$25,000.00	7/31/2022
<a href="#">Acme - 200 Widgets</a>	Prospecting	\$20,000.00	10/22/2015

- b. Or, on the **Related** tab on the Acme Account record, scroll down to the **Opportunities** section and select the **Acme Office Upgrades** opportunity by clicking on the blue hyperlinked title. Notice the opportunity opens in a new tab.

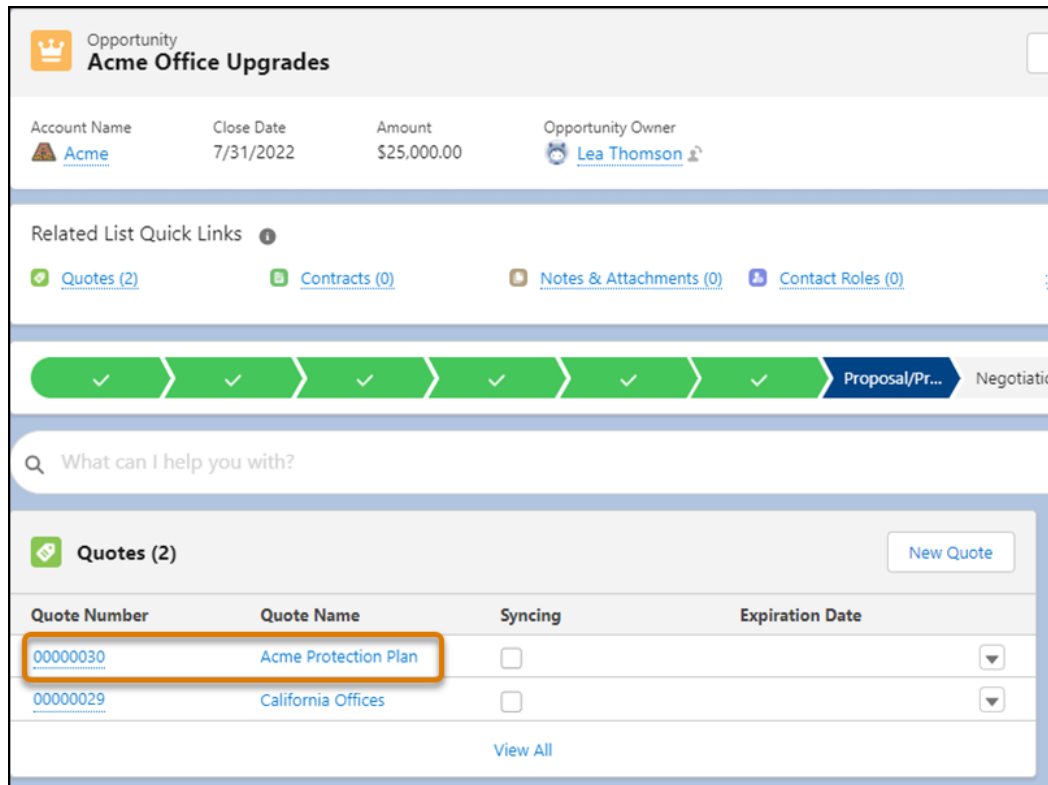


The screenshot shows the 'Opportunities (4)' section on the Acme account record. It features a 'New' button and a list of four opportunities. The first opportunity, 'Acme Office Upgrades', is highlighted with a red box. The other opportunities are 'Acme - 200 Widgets', 'Acme - 600 Widgets', and 'Acme - 1,200 Widgets'. Each opportunity card displays its stage, amount, and close date.

Opportunity Name	Stage	Amount	Close Date
<a href="#">Acme Office Upgrades</a>	Proposal/Price Quote	\$25,000.00	7/31/2022
<a href="#">Acme - 200 Widgets</a>	Prospecting	\$20,000.00	10/22/2015
<a href="#">Acme - 600 Widgets</a>	Needs Analysis	\$70,000.00	8/19/2015
<a href="#">Acme - 1,200 Widgets</a>	Value Proposition	\$140,000.00	6/23/2015

[View All](#)

3. Now you need to find the quote on the opportunity, open it and check the pricing.
  - a. In the **Quotes** section of the opportunity, click the **Acme Protection Plan** quote to open the quote record. You can click either the quote name or the quote number to open the record.

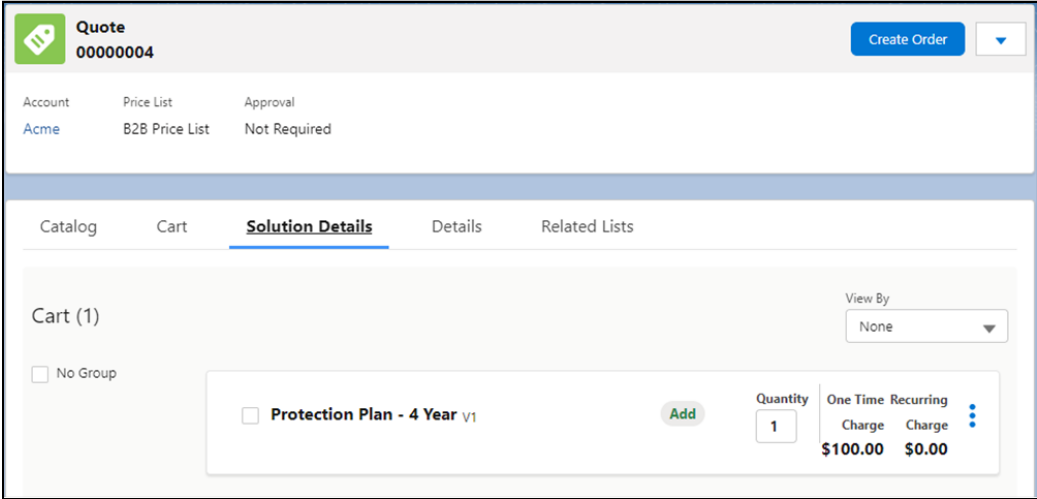


The screenshot shows the Salesforce interface for an Opportunity record titled "Acme Office Upgrades". The account is "Acme", the close date is 7/31/2022, and the amount is \$25,000.00. The opportunity owner is Lea Thomson. Below the header, there are quick links for "Quotes (2)", "Contracts (0)", "Notes & Attachments (0)", and "Contact Roles (0)". A progress bar shows the opportunity is in the "Proposal/Pr..." stage. A search bar asks "What can I help you with?". The "Quotes (2)" section is expanded, showing a table with the following data:

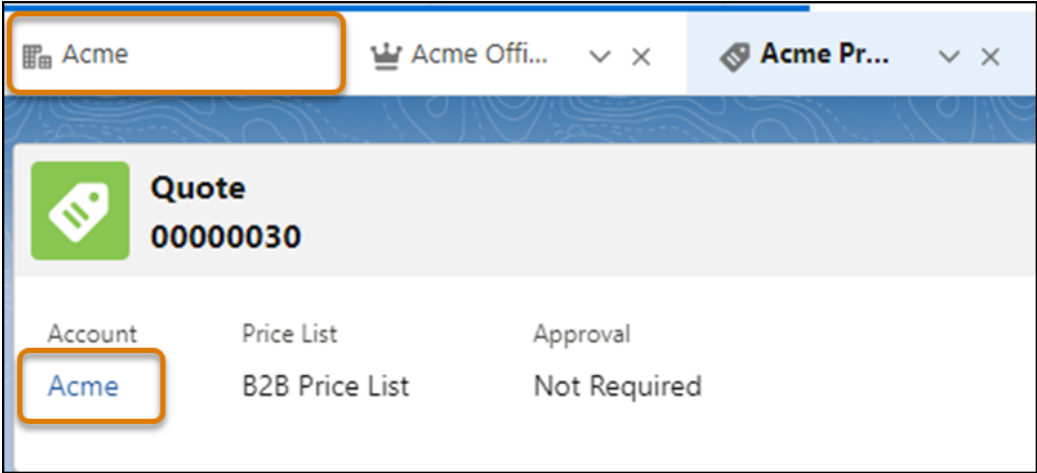
Quote Number	Quote Name	Syncing	Expiration Date
<a href="#">00000030</a>	<a href="#">Acme Protection Plan</a>	<input type="checkbox"/>	▼
<a href="#">00000029</a>	<a href="#">California Offices</a>	<input type="checkbox"/>	▼

A "New Quote" button is located in the top right of the quotes section. A "View All" link is at the bottom of the table.

- b. In the quote record, click the **Cart** or **Solution Details** tab to view details of what's included in the quote, and the pricing applied.



- c. Note the details of the protection plan. There is a one-time charge of \$100.
  - d. Add the details of the duration and price in the boxes at the start of this task.
4. The final part of this task is to check if there are any current contracts on the Acme account.
- a. Return to the Acme account record by either clicking the Acme account tab or clicking the account name in the quote, as shown here.







- b. In the **Related** tab of the account record, scroll down to the **Contracts** section. Notice there is one contract, but it is currently in Draft status, so is not an active contract.

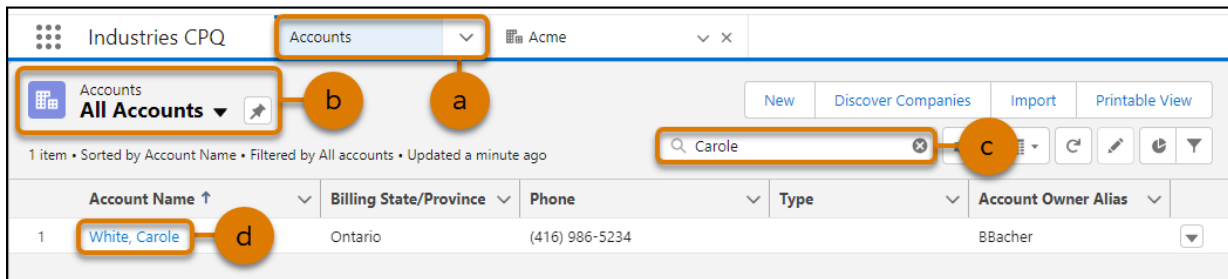
The screenshot shows a user interface for the 'Contracts' section. At the top left, there is a green icon of a document with a checkmark, followed by the text 'Contracts (1)'. To the right of this header is a 'New' button. Below the header, there is a list of contract entries. The first entry is for contract ID '00000106', which is a blue hyperlink. To its right is a small downward-pointing arrow icon. Below the ID, the text 'Contract Start ... 11/16/2020' and 'Contract End ...' is visible. Further down, the text 'Status: Draft' is displayed. At the bottom of the list, there is a 'View All' link.

## Task 4: Review the configuration of a service on Carole White's account

Carole White has phoned as she wants to check the configured download speed on her existing DSL Service, which provides the internet to her house. Sophia checks the DSL Service asset on Carole's account and makes a note of the details.

Download speed of Carole White's DSL Service:

1. Open Carole White's account record.

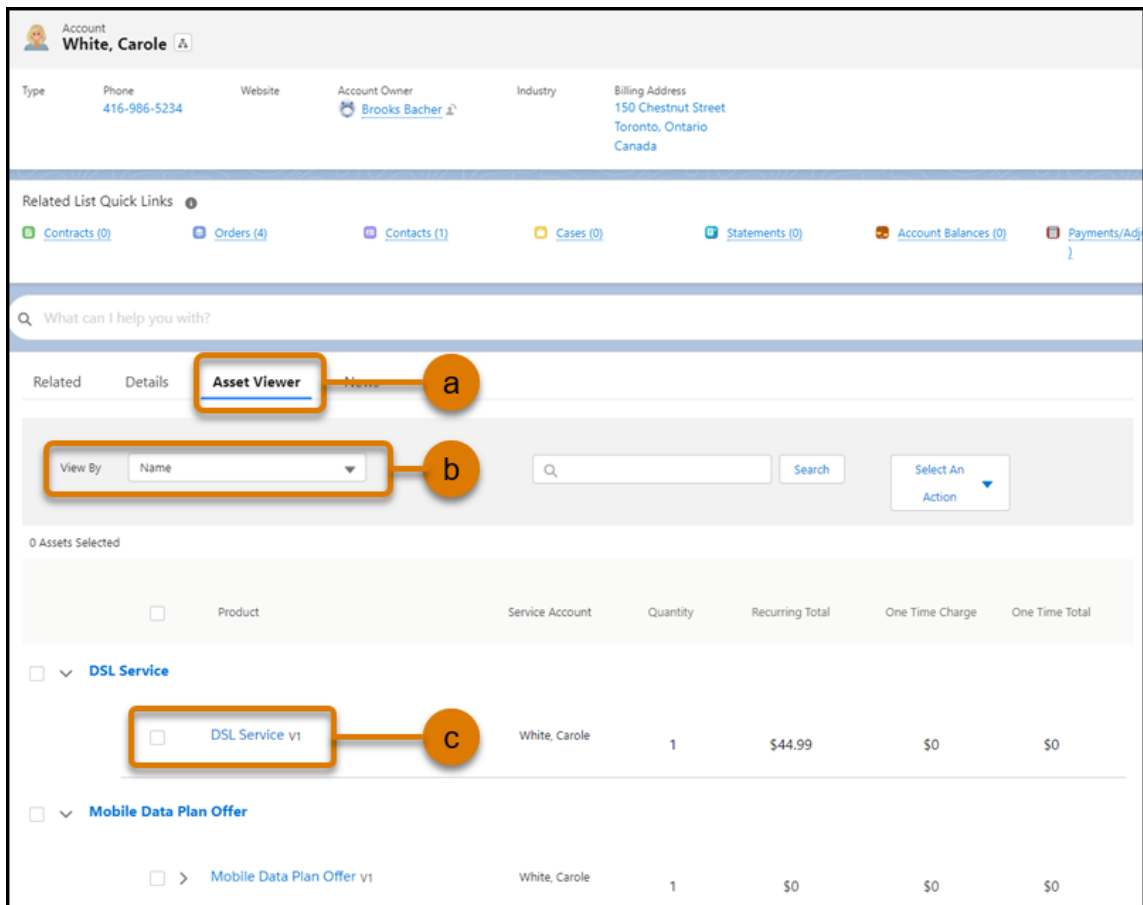


The screenshot shows the Salesforce Industries CPQ interface. The top navigation bar includes 'Industries CPQ', a dropdown menu for 'Accounts', and a search bar containing 'Carole'. The main content area displays a list of accounts with columns for 'Account Name', 'Billing State/Province', 'Phone', 'Type', and 'Account Owner Alias'. The first account is 'White, Carole'. Annotations 'a', 'b', 'c', and 'd' are placed on the interface: 'a' points to the 'Accounts' dropdown, 'b' points to the 'All Accounts' view selector, 'c' points to the search bar, and 'd' points to the 'White, Carole' account name in the list.

Account Name ↑	Billing State/Province	Phone	Type	Account Owner Alias
1 White, Carole	Ontario	(416) 986-5234		BBacher

- a. Select **Accounts** from the navigation menu to view the accounts list.
- b. Select **All Accounts** from the list view to ensure you're searching through all the customer accounts.
- c. Type the first part of the customer name in the search bar and press **[Enter]**.
- d. Select **Carole White**'s account from the account list.

2. Locate and open the DSL Service asset on Carole's account.



The screenshot shows the Salesforce account page for White, Carole. The 'Asset Viewer' tab is highlighted with an orange box and labeled 'a'. Below it, the 'View By' dropdown menu is highlighted with an orange box and labeled 'b', showing 'Name' selected. In the table below, the 'DSL Service v1' row is highlighted with an orange box and labeled 'c'.

<input type="checkbox"/>	Product	Service Account	Quantity	Recurring Total	One Time Charge	One Time Total
<input type="checkbox"/>	<b>DSL Service</b>					
<input type="checkbox"/>	DSL Service v1	White, Carole	1	\$44.99	\$0	\$0
<input type="checkbox"/>	<b>Mobile Data Plan Offer</b>					
<input type="checkbox"/>	> Mobile Data Plan Offer v1	White, Carole	1	\$0	\$0	\$0

- Click the **Asset Viewer** tab.
- Notice you can choose to group how you view assets using the **View By** menu. Let's try it out. Select View By **Name**. The assets are grouped by asset name.
- Click **DSL Service** to open the DSL Service asset record and view its details.
- On the **Details** tab of the DSL Service asset record, scroll to the bottom of the page to check the **Asset Attributes**. What is the download speed of the Internet Services?



**Yay! All done!**