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

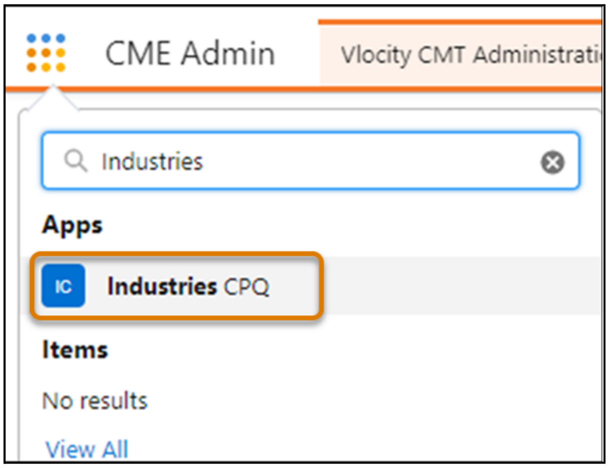
Time: 15 mins

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.

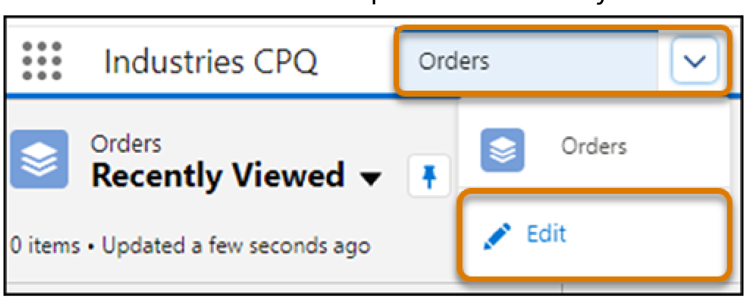
Task 1: Set up your Industries CPQ navigation tab

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**.

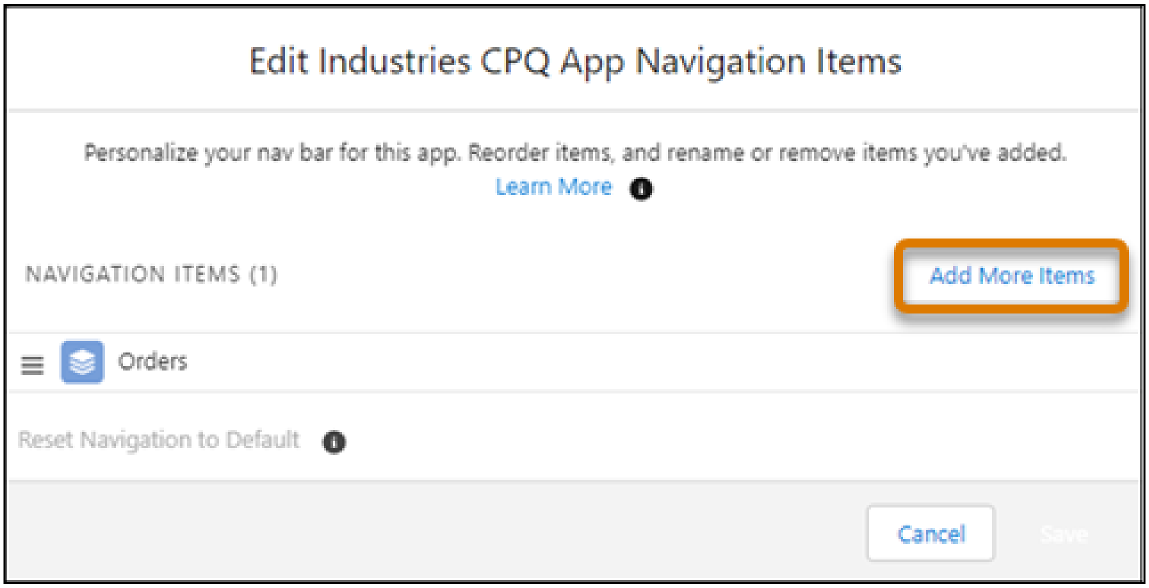


2. The first time you use Industries CPQ, you'll need to set up the navigation tab with the workspaces you're most likely to use. (This is a one-off task: once it's done, you'll be able to access the workspaces whenever you need them.)

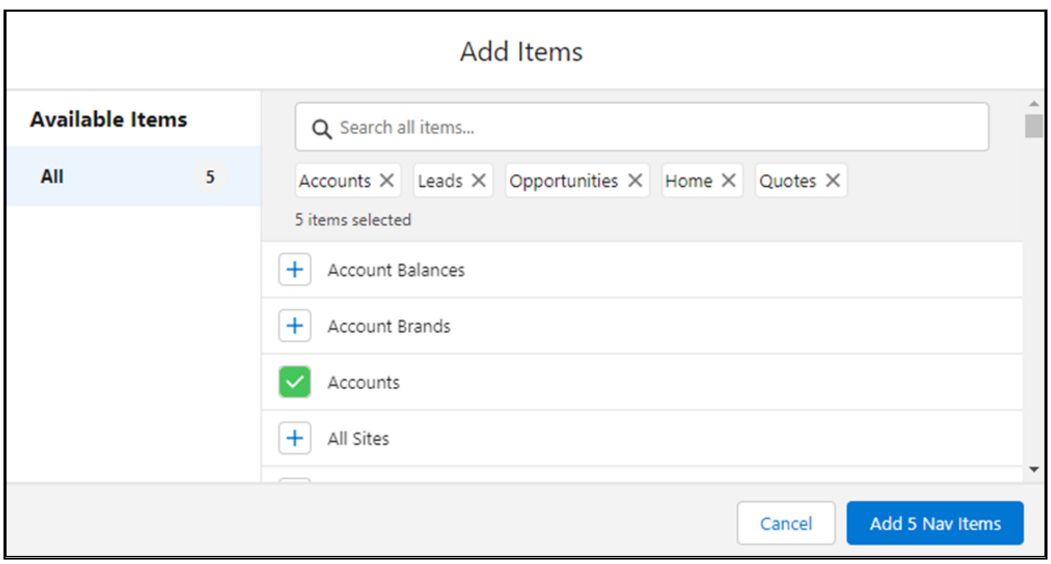


   a. Click the **navigation tab menu**. At present it has only the Orders workspace for selection.
   b. Click **Edit** to edit the navigation tab menu.

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

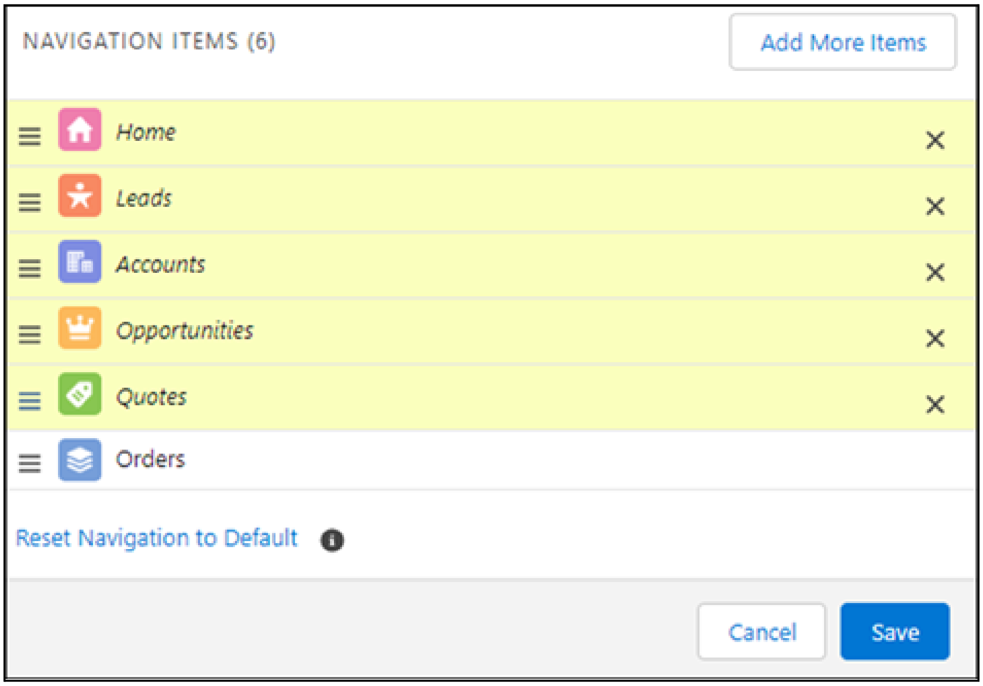


   a. Click **Add More Items**.



   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

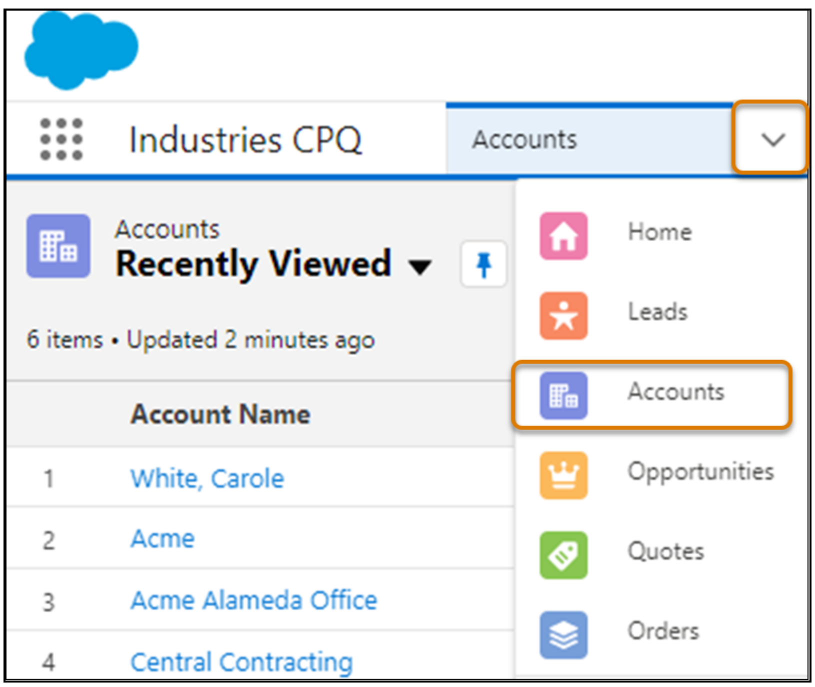
Sophia's been asked to add Dr Sai Grover, the Purchasing Manager of Acme, who is based in the Acme Alameda office, as the contact for the Acme Alameda office. Sai's phone number is 206-555-0177 and their email is sai.grover@acmeisthebest.com.

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

How many offices are associated with the Acme account?	

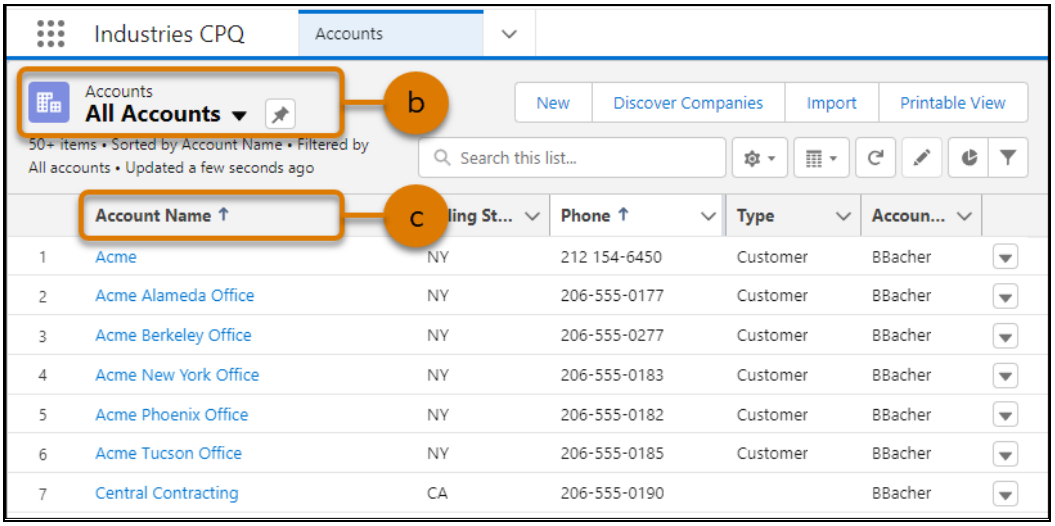
1. This information is stored on the Acme account, so start by opening the Acme account in Industries CPQ.

    a. In **Industries CPQ**, click the navigation menu and select **Accounts**.



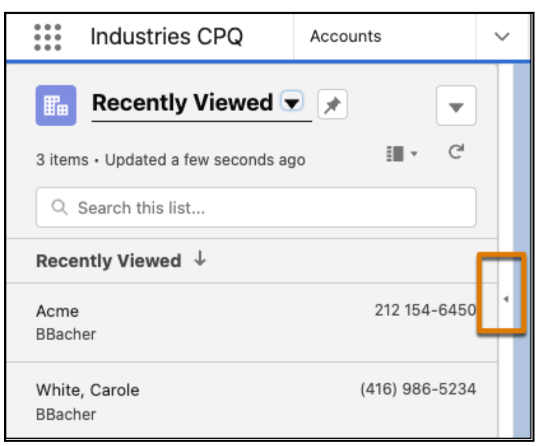
b. In the Accounts list click **Recently Viewed** and change the list view to **All Accounts**. Click the **pin icon** to make All Accounts your default account list view.

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.

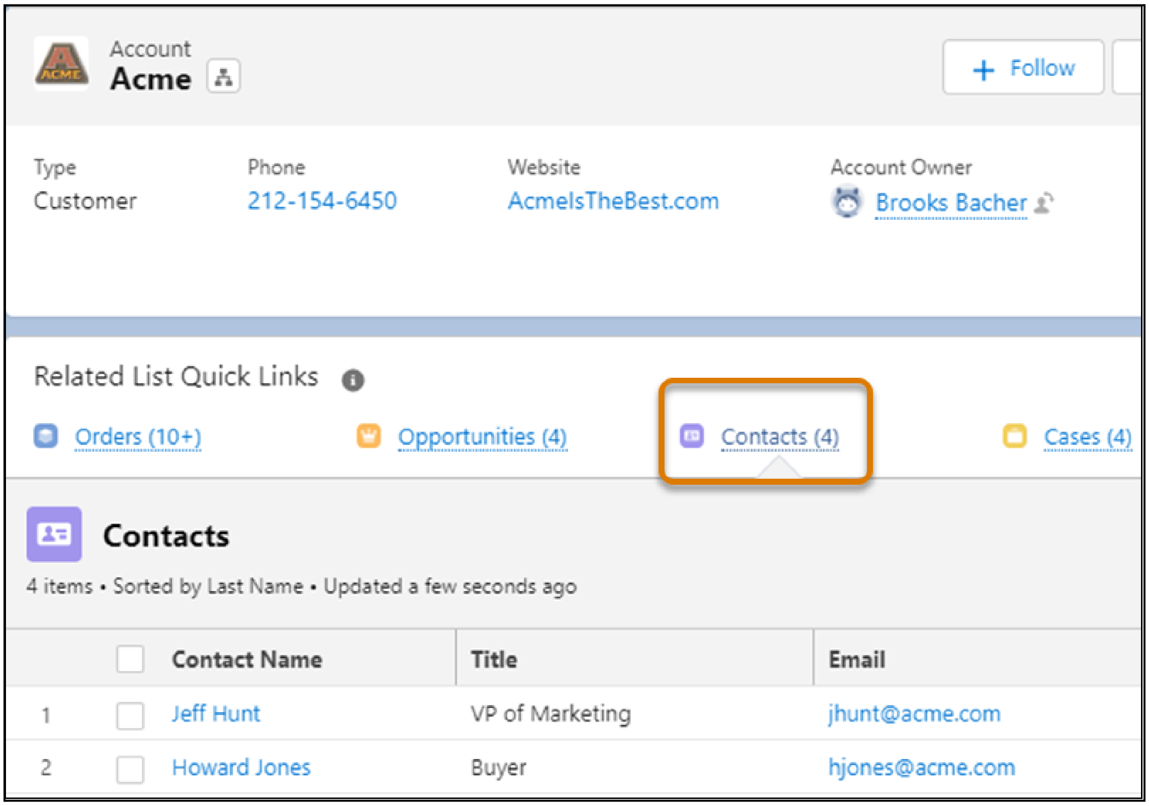


d. Click **Acme** on the list to open the Acme account record.

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.

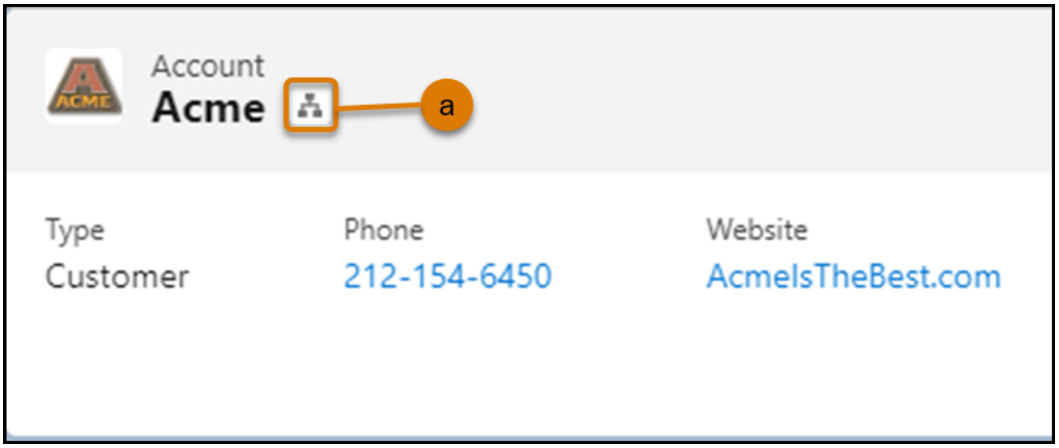


2. Now that the Acme account is open, your next step is to add Sai as a contact to the Acme Alameda office. First, let's check if Sai is already a contact at Acme. Hover over the contacts quick link at the top of the Acme account record. Is Sai in the Acme contacts list?



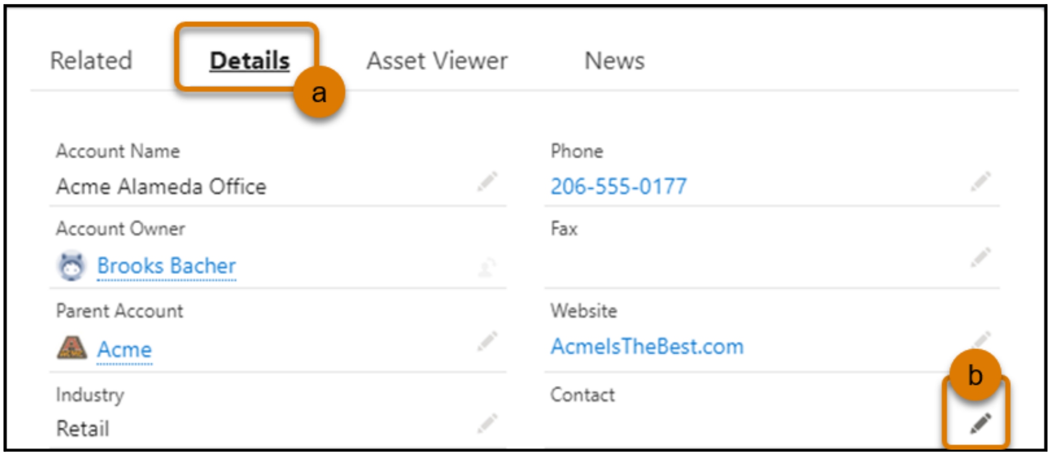
3. Sai's not on the Acme main contacts list. Let's check if they're a contact for the Acme Alameda Office. Start by opening the Acme Alameda Office account record.

   a. Click **View Account Hierarchy** to see all the service and billing accounts associated with the Acme account. A new tab is opened.

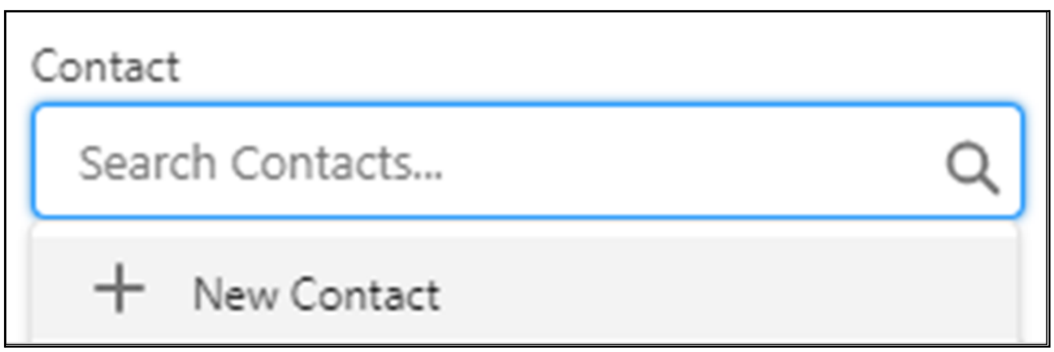


   b. How many offices does Acme have? Make a note of the number of offices in the box at the start of this task.
   c. From this list of Acme accounts, click **Acme Alameda Office** to open the service account record for the Alameda office. Note that it opens as a new tab in the Acme account workspace.

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.



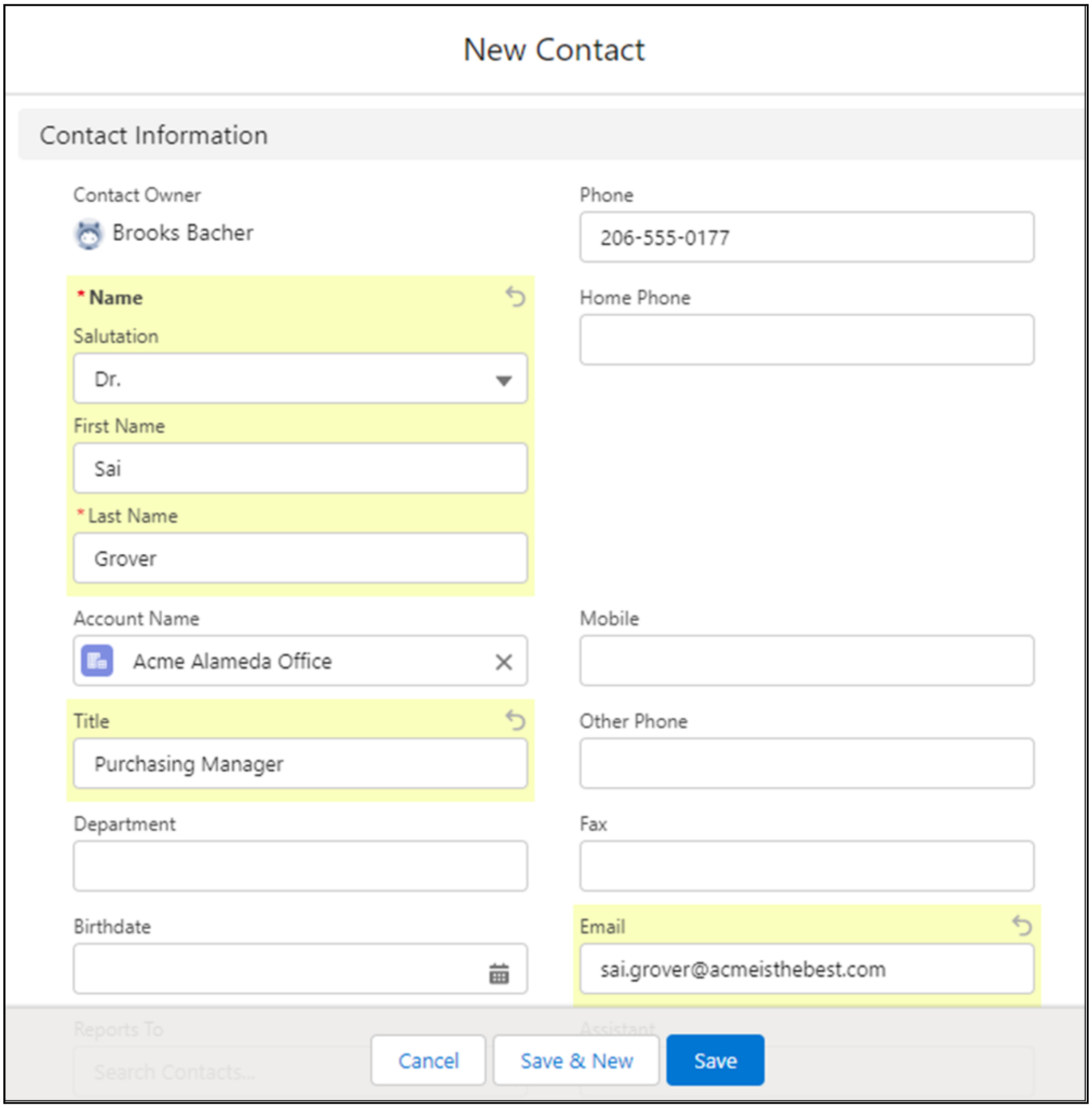
    c. First let's check if Sai's already a contact for this office. Click in the **Contact** field and type `Sai`, then select **Show All Results for "Sai"**. No contact is found.
    d. Close the search.
    e. Time to add Sai as a contact for the Alameda office. Clear "Sai" from the search box and select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



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

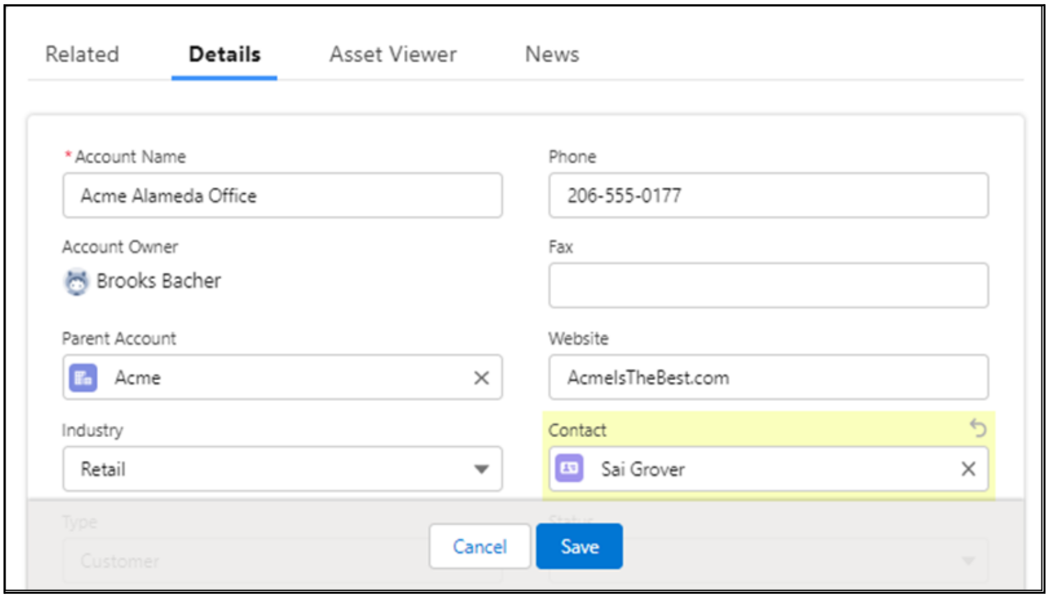
Field	Value
Salutation	Dr
First Name	`Sai`
Last Name	`Grover`
Phone	`206-555-0177`
Account Name	Acme Alameda Office
Title	`Purchasing Manager`
Email	`sai.grover@acmeisthebest.com`

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

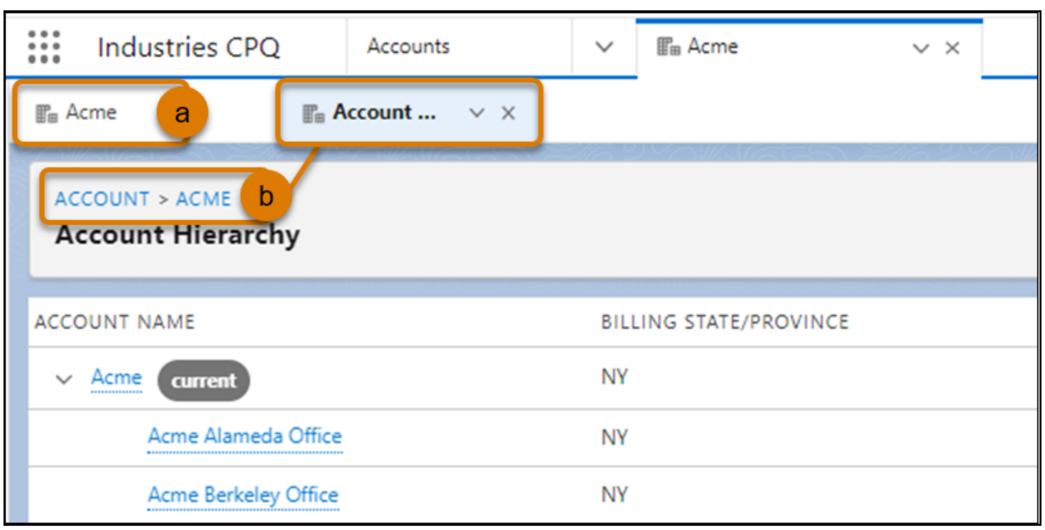


g. Click **Save** to save the contact record and return to the Alameda office account record.

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



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.



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

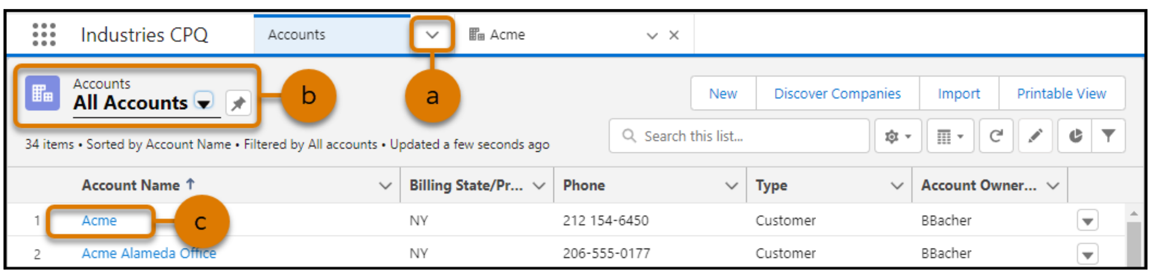
Sophia takes a call from Sai from Acme. Sai wants to check the pricing on a quote created recently for protection of equipment as part of the Acme office upgrade.

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

Duration:		Original One-Time Charge:		Recurring Charge:	

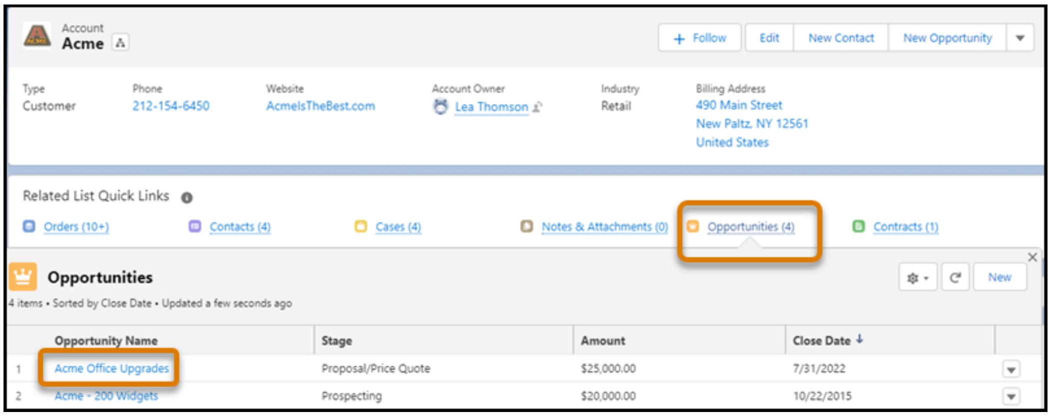
Sai also wants to check if there are currently any active contracts between Acme and Infiwave.

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

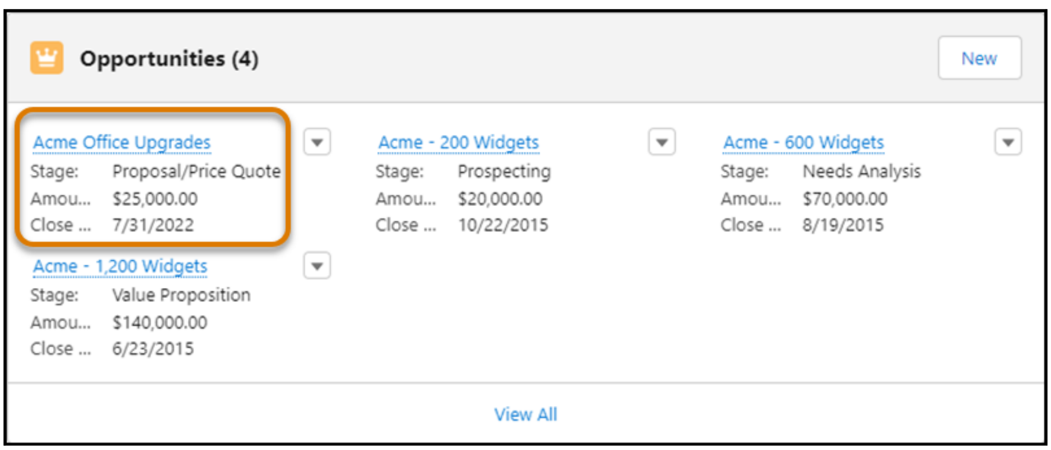


   a. Select **Accounts** from the navigation menu to view the accounts list.
   b. Check you have **All Accounts** selected as the list view.
   c. Click **Acme** in the accounts list to open the Acme account record.

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.

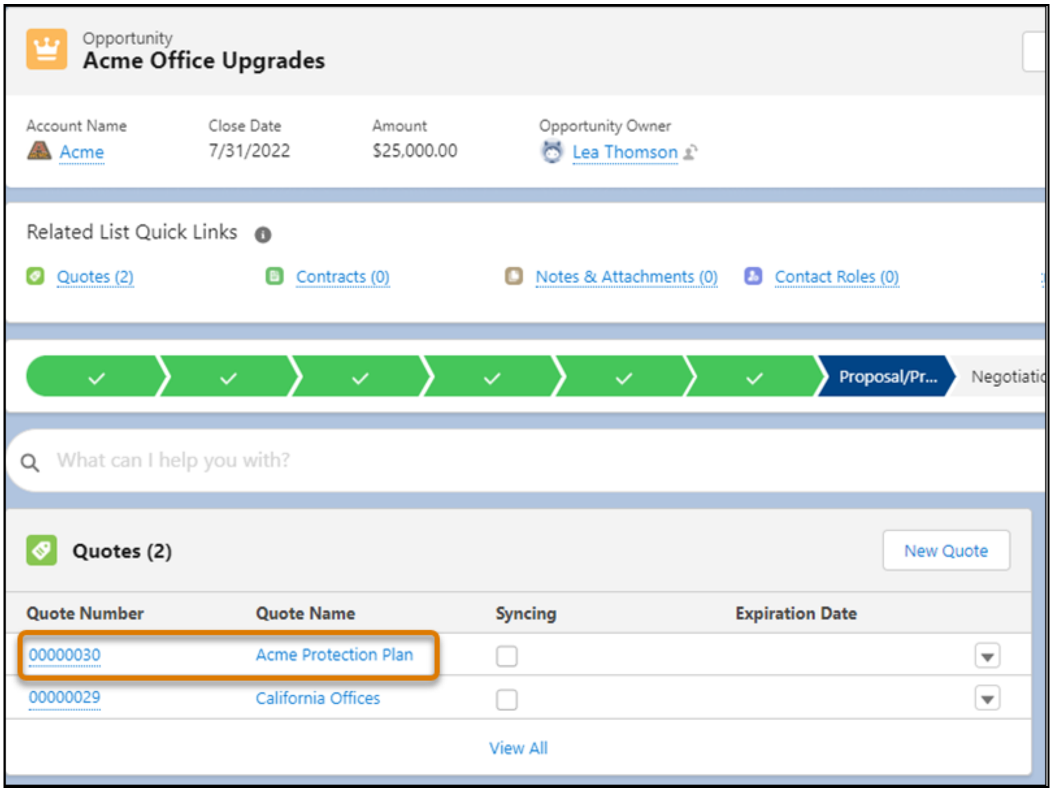


    b. Or, on the **Related** tab on the Acme Account record, scroll down to the **Opportunities** section and select the **Acme Office Upgrades** opportunity by clicking on the blue hyperlinked title. Notice the opportunity opens in a new tab.

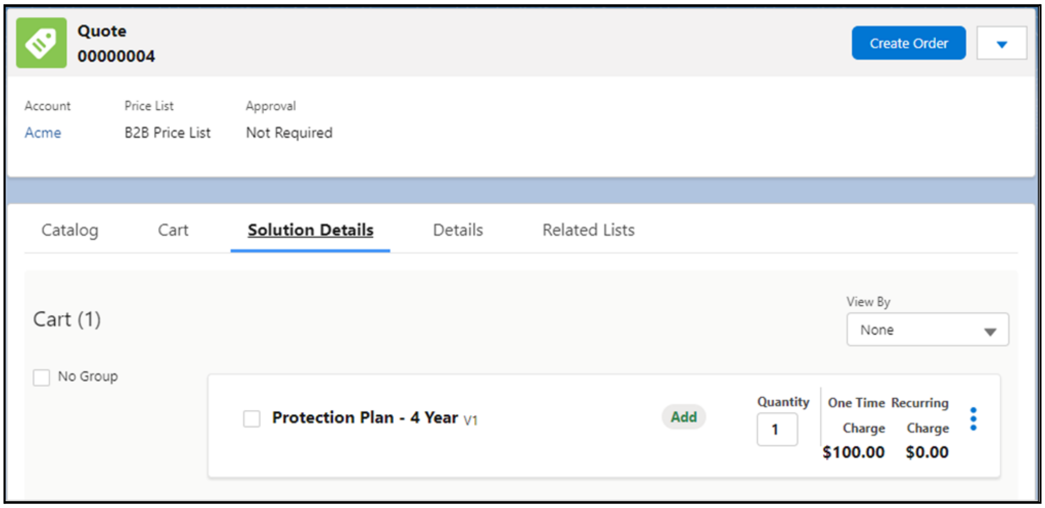


3. Now you need to find the quote on the opportunity, open it and check the pricing.

    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.

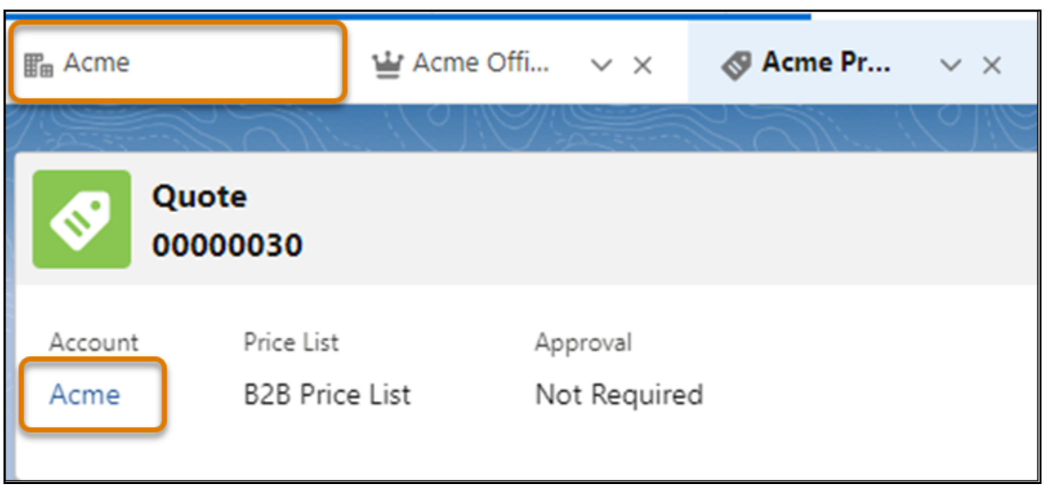


    b. In the quote record, click the **Cart** or **Solution Details** tab to view details of what's included in the quote, and the pricing applied.



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.



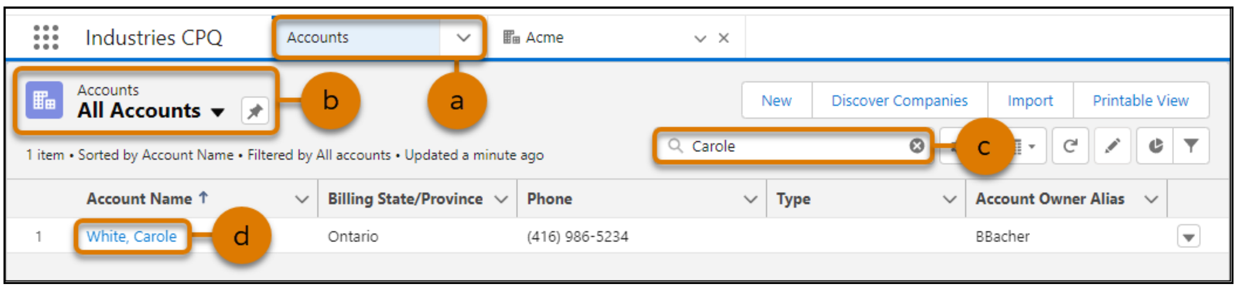
b. In the **Related** tab of the account record, scroll down to the **Contracts** section. Notice there is one contract, but it is currently in Draft status, so is not an active contract.

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.

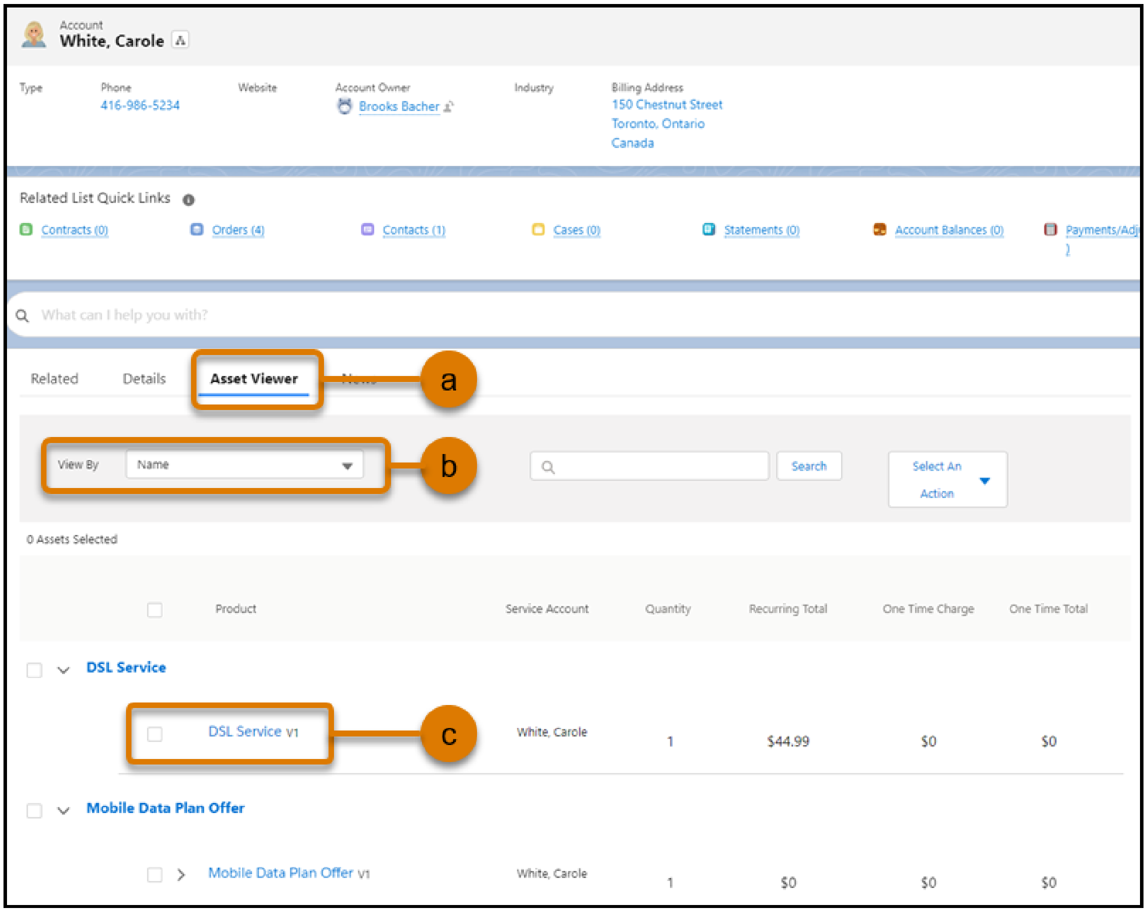
Download speed of Carole White's DSL Service:

1. Open Carole White's account record.



   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.



   a. Click the **Asset Viewer** tab.
   b. 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.
   c. Click **DSL Service** to open the DSL Service asset record and view its details.
   d. 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!