
Exercise 2: Create a Quote

Scenario



Sai from Acme is on the phone. Sai wants a quote for internet services at the new Acme New York office. Sophia's feeling confident. She creates a new quote for Acme, then updates the shipping address for the New York office premises.

Goals

- Create a quote
- Navigate the quote
- Amend quote details

Tasks

1. Create the Acme New York Office quote
2. Amend the shipping address on the quote

Time: 5 mins



NOTE:

Completing your learning with Trailhead? This exercise relates to Unit 1 of the the Industries CPQ Quotes and Proposals badge. Ensure you've completed this unit before you undertake Exercise 2.



Task 1: Create the Acme New York Office quote

Sophia logs onto Salesforce Industries CPQ, locates the Acme Office Upgrades opportunity, then creates a new quote on the opportunity called Acme New York Office.

1. Practice the skills you learned in Exercise 1 to open Industries CPQ and, on the Acme account, locate the **Acme Office Upgrades** opportunity. If you need help, follow the instructions for Task 3 of Exercise 1 in this guide.
2. Create a new quote on the opportunity called **Acme New York Office**.
 - a. On the **Acme Office Upgrades** opportunity, scroll to the **Quotes** section and click **New Quote** to create a new quote.
 - b. Add these details to the quote record.

Field	Value
Quote Name	Acme New York Office
Price List	B2B Price List
Number Of Contracted Months	24

New Quote

Quote Information

Quote Number

Number Of Contracted Months
24

* Quote Name
Acme New York Office

Tax

Price List
B2B Price List

Ship To Name
Acme

Opportunity Name
Acme Office Upgrades

Ship To
Search Address

Ship To Street
490 Main Street

Ship To City
New York

Ship To State/Province
NY

Ship To Zip/Postal Code
10044

Ship To Country
United States

Account Name
Acme

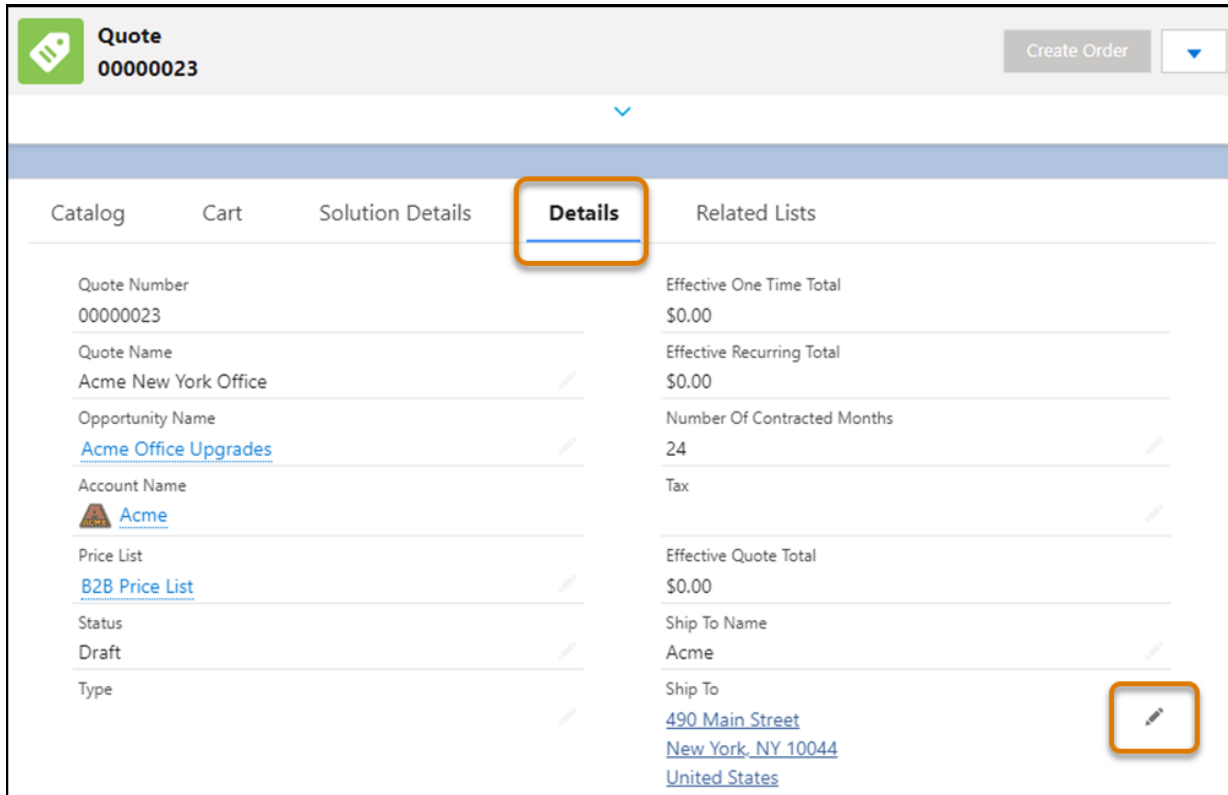
Synced Order
Search Orders...

Cancel Save & New Save


- c. Click **Save**. A confirmation message displays telling you the quote has been created. Congratulations! - you've created your first Industries CPQ quote.

Task 2: Amend the shipping address on the quote

Sai wants to ensure any deliverables for the quote are sent to the correct New York office location. Sophia amends the shipping address on the quote to the address of Acme's New York office at Floor 2, 490 Main Street, New Paltz.



The screenshot shows the Salesforce CPQ interface for a quote record. The quote number is 00000023. The 'Details' tab is selected and highlighted with an orange box. The 'Ship To' field is highlighted with an orange box and contains a pen icon, indicating it is being edited. The shipping address is 490 Main Street, New York, NY 10044, United States.

Catalog	Cart	Solution Details	Details	Related Lists
Quote Number			00000023	Effective One Time Total
Quote Name			Acme New York Office	Effective Recurring Total
Opportunity Name			Acme Office Upgrades	Number Of Contracted Months
Account Name			 Acme	Tax
Price List			B2B Price List	Effective Quote Total
Status			Draft	Ship To Name
Type				Acme
				Ship To
				490 Main Street
				New York, NY 10044
				United States

1. In the Acme New York Office quote record, click **Details** to open the Details tab on the quote.
2. Edit the shipping address.
 - a. Click the pen icon to the right of the **Ship To** details on the quote record.



b. Update the address to include the correct floor, city, and zip code.

Field	Value
Ship To Street	Floor 2, 490 Main Street
Ship to City	New Paltz
Ship to Zip/Postal Code	12561


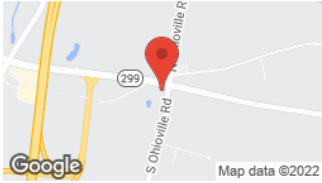
Note that any amendments to a record are highlighted in yellow before they're saved.

The screenshot shows a shipping address form with the following fields and values:

- Ship To Name: Acme
- Ship To: Search Address (with a search icon and a refresh icon)
- Ship To Street: Floor 2, 490 Main Street
- Ship To City: New Paltz
- Ship To State/Province: NY
- Ship To Zip/Postal Code: 12561
- Ship To Country: United States

The 'Ship To' section, including the search bar and the 'Ship To Street', 'Ship To City', 'Ship To State/Province', 'Ship To Zip/Postal Code', and 'Ship To Country' fields, is highlighted in yellow.

- c. Scroll down to the bottom of the quote details and click **Save** to save the changes.
- d. Notice the amended shipping address is displayed on the quote.

Catalog	Cart	Solution Details	Details	Related Lists
Quote Number				Effective One Time Total
00000023				\$0.00
Quote Name				Effective Recurring Total
Acme New York Office				\$0.00
Price List				Number Of Contracted Months
B2B Price List				24
Opportunity Name				Tax
Acme Office Upgrades				
Account Name				Effective Quote Total
 Acme				\$0.00
Status				Ship To Name
Draft				Acme
Type				Ship To
				Floor 2, 490 Main Street New Palz, NY 12561 United States
				
Bill To Name				Synced Order
Acme				



Yay! All done!