
Exercise 3: Add Products to a Quote

Scenario

Sophia is steaming ahead with the New York office quote for Acme. She decides to add two products to the quote, one for fast office broadband and the other for installation.

Goals

- Locate existing quotes
- Browse and search the catalog
- Explain the purpose of product versioning
- Add products to the cart
- Review the cart contents

Tasks

1. Locate and open the Acme New York Office quote
2. Add Blast! Pro Internet to the quote cart
3. Configure Installation before adding to the quote cart
4. Review the quote cart

Time: 5 mins



NOTE:

Completing your learning with Trailhead? This exercise relates to Unit 2 of the the Industries CPQ Quotes and Proposals badge. Ensure you've completed this unit before you undertake Exercise 3.

Task 1: Locate and Open the Acme New York Office quote

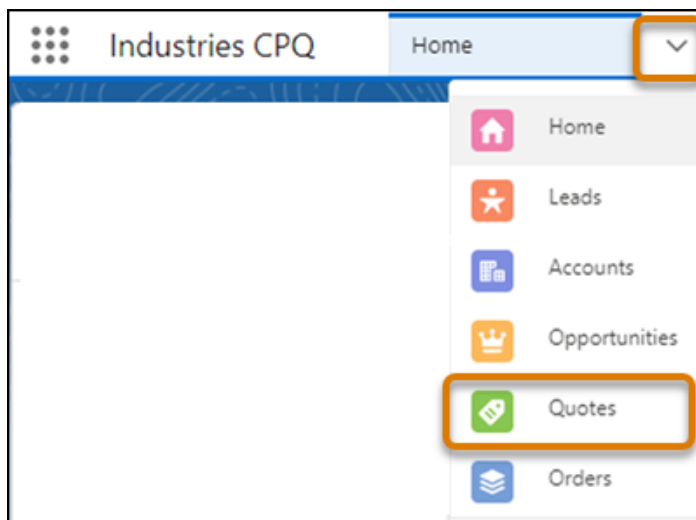
Sophia logs onto Salesforce Industries CPQ then locates and opens the Acme New York Office quote.



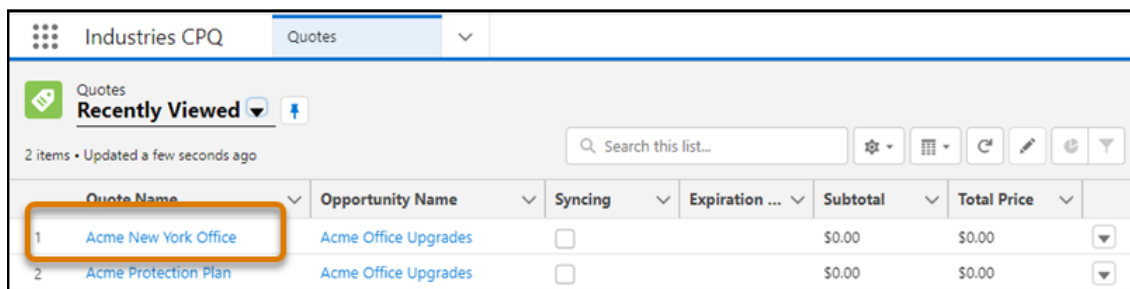
NOTE:

If you already have your quote open, you can skip this step.

1. From the Industries CPQ navigation menu, select **Quotes** to see a list of all quotes.



2. Select the **Acme New York Office** quote from the **Recently Viewed Quotes** list to open the quote.

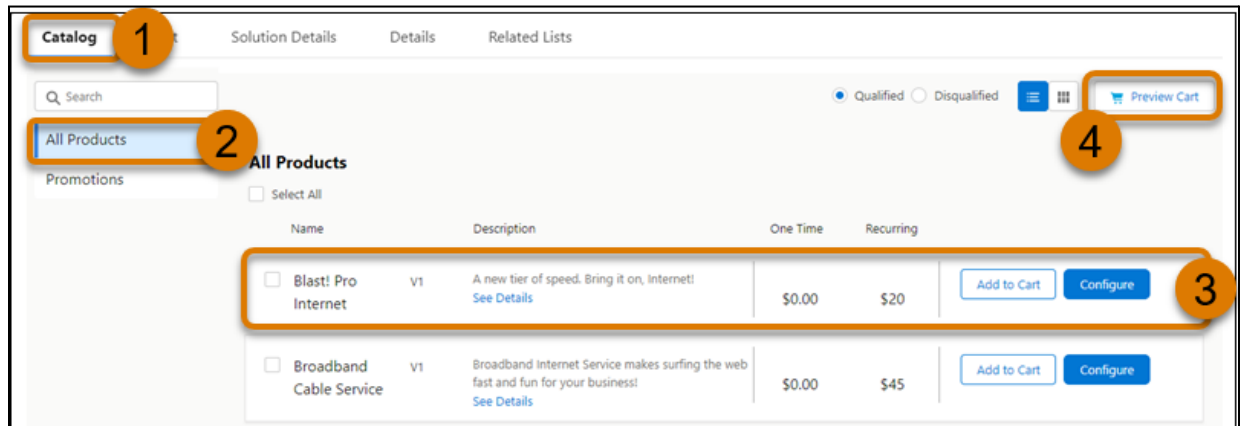


The screenshot shows the 'Quotes' page in the Salesforce Industries CPQ interface. The 'Recently Viewed' section is active, displaying a list of two quotes. The first quote, 'Acme New York Office', is highlighted with an orange box.

Quote Name	Opportunity Name	Syncing	Expiration ...	Subtotal	Total Price
1 Acme New York Office	Acme Office Upgrades	<input type="checkbox"/>		\$0.00	\$0.00
2 Acme Protection Plan	Acme Office Upgrades	<input type="checkbox"/>		\$0.00	\$0.00

Task 2: Add Blast! Pro Internet to the quote cart

In the Acme New York Office quote, Sophia locates the Blast! Pro Internet product in the catalog and adds it to the cart.



1. In the Acme New York Office quote, select the **Catalog** tab to view the product catalog.
2. Click **All Products** in the browse pane to ensure you're viewing all the available products for Acme.
3. Blast! Pro Internet appears at the top of the Products List. Click **See Details** to view more details about the product, such as the description and charges. Close the details dialog by clicking the **X** in the top right of the dialog.
4. Click **Add to Cart** on the Blast! Pro Internet product to add the product to the quote cart.
5. Click **Preview Cart** to check Blast! Pro Internet has been added to the cart.



The screenshot displays the Salesforce CPQ Quote interface for quote 00000023. The account is Acme, the price list is B2B Price List, and approval is not required. The main area shows a catalog of products. A table lists products with columns for Name, Description, One Time, and Recurring charges. The 'Blast! Pro Internet v1' product is highlighted, showing a one-time charge of \$0.00 and a recurring charge of \$20.00. A 'Cart Preview' window is open on the right, showing the selected product with a quantity of 1, a one-time charge of \$0.00, and a recurring charge of \$20.00. The original price of \$25.00 is crossed out. The interface also includes a search bar, a 'Create Order' button, and various navigation tabs like 'Catalog', 'Cart', 'Solution Details', 'Details', and 'Related Lists'.

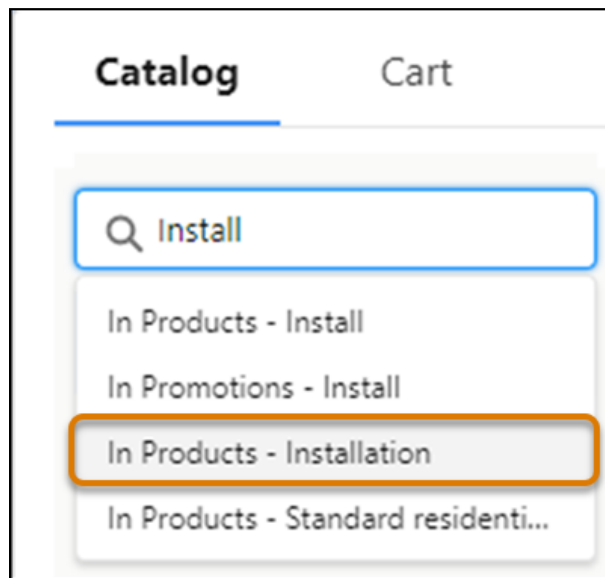
Name	Description	One Time	Recurring
Blast! Pro Internet v1	A new tier of speed. Bring it on, Internet! See Details	\$0.00	\$20
Broadband Cable Service v1	Broadband Internet Service makes surfing the web fast and fun for your business! See Details	\$0.00	\$45

Notice the recurring charge has been reduced by \$5. The original price of \$25 is struck through and shown beneath the new price of \$20. This is because a rule is set up in the training playground catalog to automatically offer a reduced price of \$20 to all customers such as Acme that have platinum service level agreements.

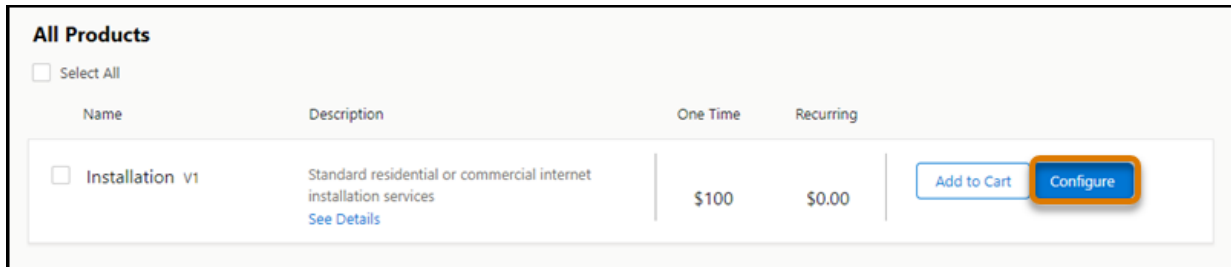
Task 3: Configure Installation before adding to the quote cart

In the Acme New York Office quote, Sophia searches for the Installation service in the catalog and configures it before adding it to the cart.

1. Locate the Installation product in the catalog.
 - a. If you're not already in the catalog workspace of the Acme New York Office quote, select the **Catalog** tab.
 - b. In the search bar of the browse pane in the catalog workspace, type `Install`. Industries CPQ uses smart-search features to suggest potential items you might be searching for.
 - c. Select **In Products - Installation** from the smart search results to search for the word Installation in the products available to Acme. The current version (version one) of the Installation service is displayed in the products list.

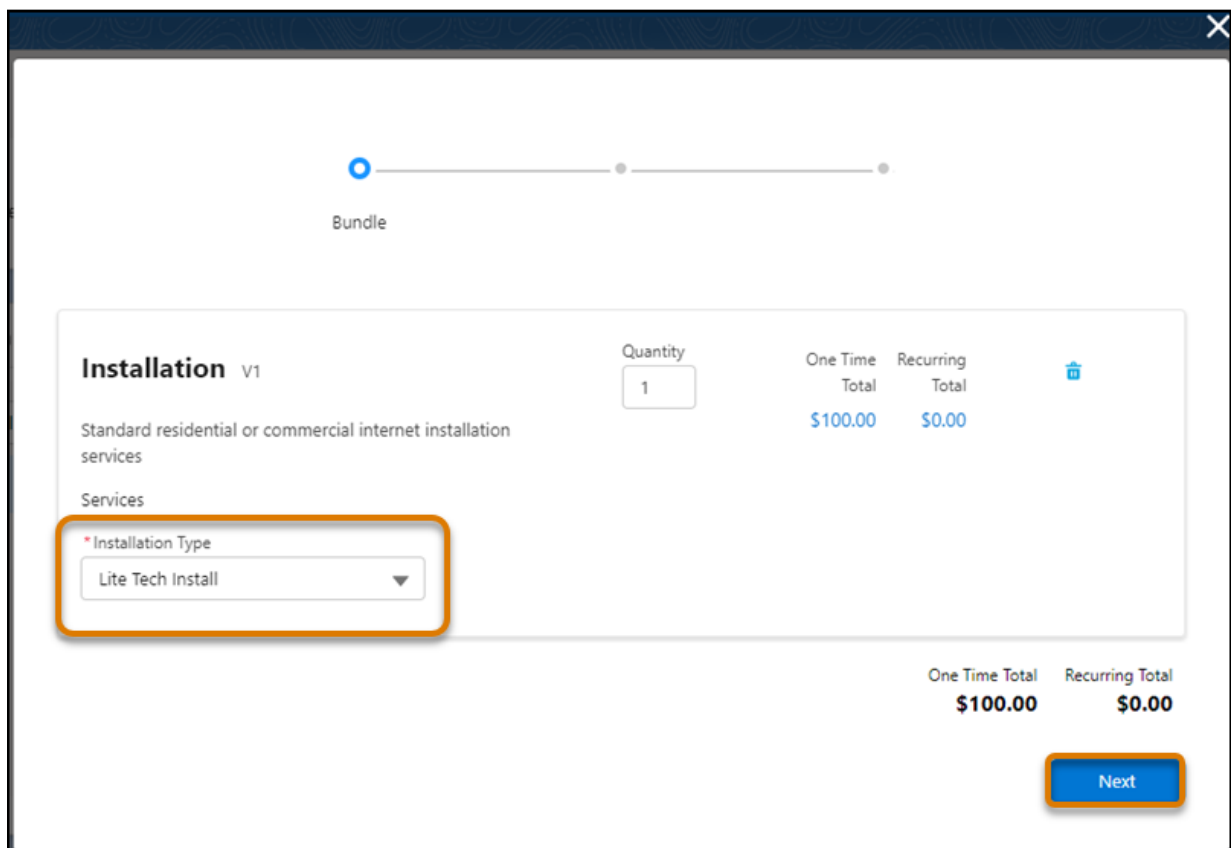


2. Configure the Installation product before adding to the cart.



All Products					
<input type="checkbox"/> Select All					
Name	Description	One Time	Recurring	<input type="button" value="Add to Cart"/>	<input type="button" value="Configure"/>
<input type="checkbox"/> Installation V1	Standard residential or commercial internet installation services See Details	\$100	\$0.00		

a. On the Installation service in the Products List, click **Configure** to configure the service before adding it to the cart.



Bundle

Installation V1	Quantity	One Time Total	Recurring Total	
Standard residential or commercial internet installation services	1	\$100.00	\$0.00	<input type="button" value="Trash"/>

Services

* Installation Type
Lite Tech Install

One Time Total: \$100.00
Recurring Total: \$0.00

b. You're taken through a guided configuration process for the Installation service. Amend the mandatory **Installation Type** to **Lite Tech Install** and click **Next**.



- c. A summary of the product details, price, and quantity is displayed. Here you'd add extra quantities if required, then check the customer is ok with the price before clicking **Next**. The configured Installation service is added to the cart.

Progress bar: Summary


Product Name	Version	Add	Quantity	One Time Charge	Recurring Charge
Installation	V1	Add	1	\$100.00	\$0.00

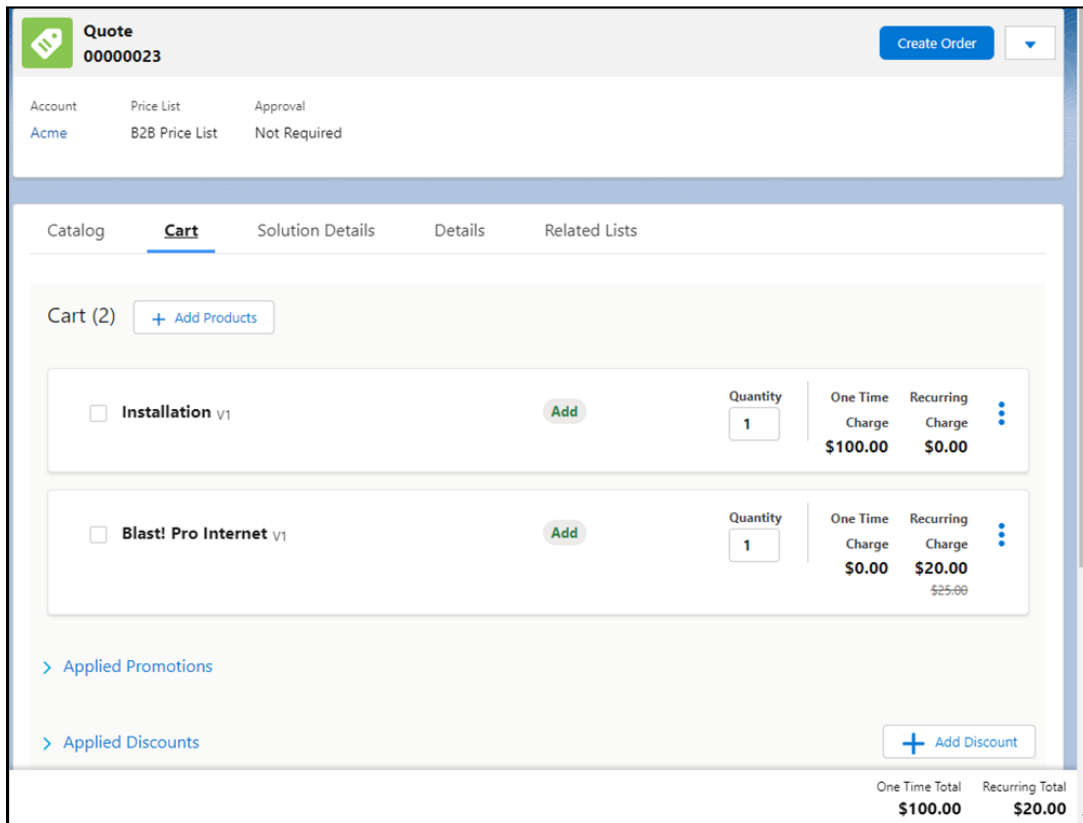
One Time Total	Recurring Total
\$100.00	\$0.00

Buttons: Previous, Next

Task 4: Review the quote cart

Sophia's done with adding and configuring the products for Acme. She checks the cart to ensure that everything has been added correctly and makes a note of the quote total.

1. Switch to the **Cart** tab in the quote.
2. Check you have both the Installation and the Blast! Pro Internet in your quote. If the products don't appear, refresh your browser tab.
3. Note **Create Order** is active in the quote header. This means the quote is valid and may be converted into an order. Don't do it just yet! - we'll be covering this later.
4. Make a note of the **One Time Total** and the **Recurring Total** for the Acme New York Office quote.
5. Click  at the end of the Blast! Pro Internet line item. What actions are available for this line item?



The screenshot shows the Salesforce CPQ Quote Cart interface. At the top, there is a header for the quote with the ID 00000023 and a 'Create Order' button. Below this, the account 'Acme' is listed with a price list of 'B2B Price List' and an approval status of 'Not Required'. The main section is titled 'Cart (2)' and contains two line items:

Item	Quantity	One Time Charge	Recurring Charge
Installation v1	1	\$100.00	\$0.00
Blast! Pro Internet v1	1	\$0.00	\$20.00

At the bottom right, the totals are displayed: One Time Total is \$100.00 and Recurring Total is \$20.00.



Yay! All done!