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.

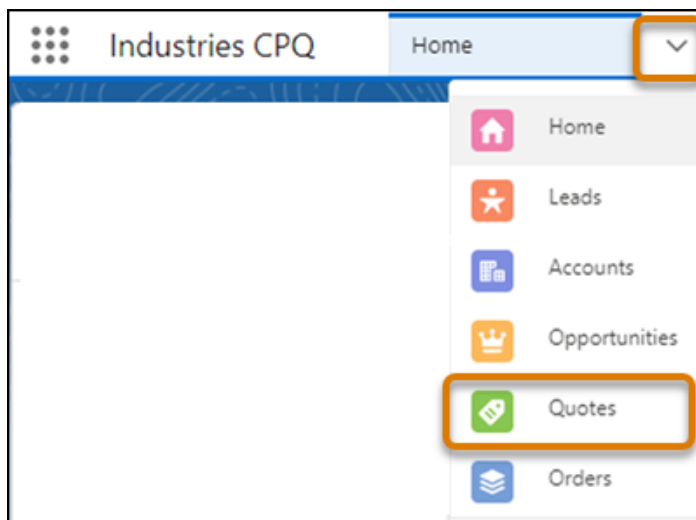## Task 1: Locate and Open the Acme New York Office quote

Sophia logs onto Salesforce Industries CPQ then locates and opens the Acme New York Office quote.
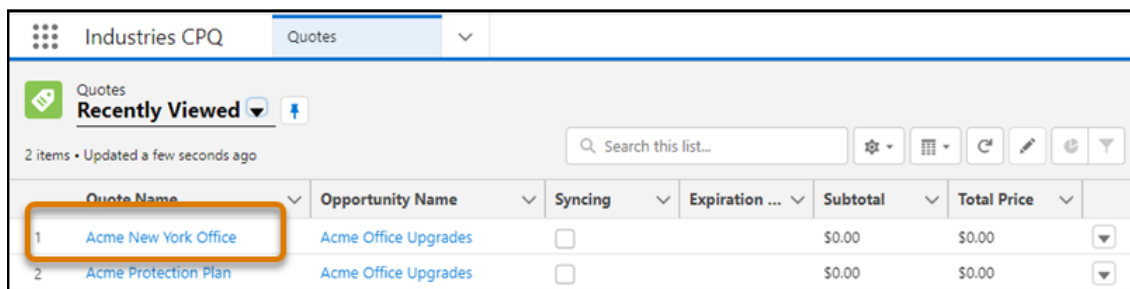
(i)	**NOTE:** If you already have your quote open, you can skip this step.

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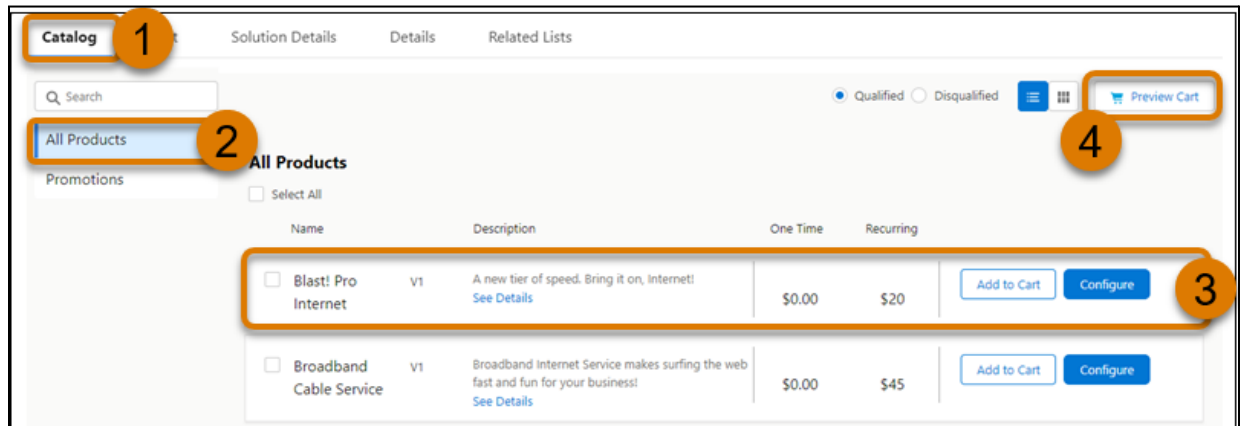
Task 2: Add Blast! Pro Internet to the quote cart

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.

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.
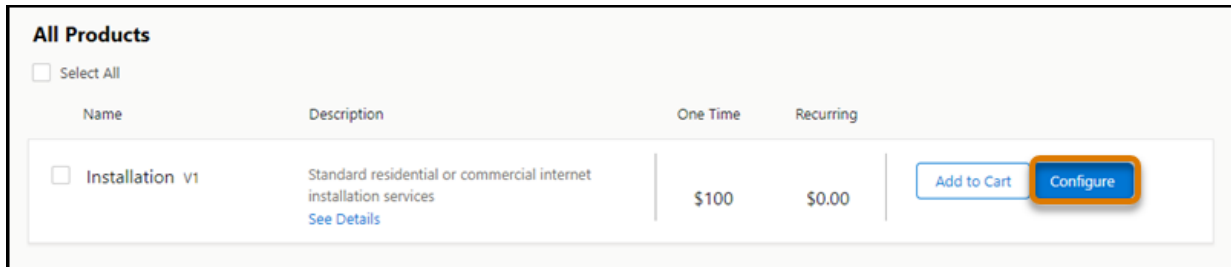
Task 3: Configure Installation before adding to the quote cart

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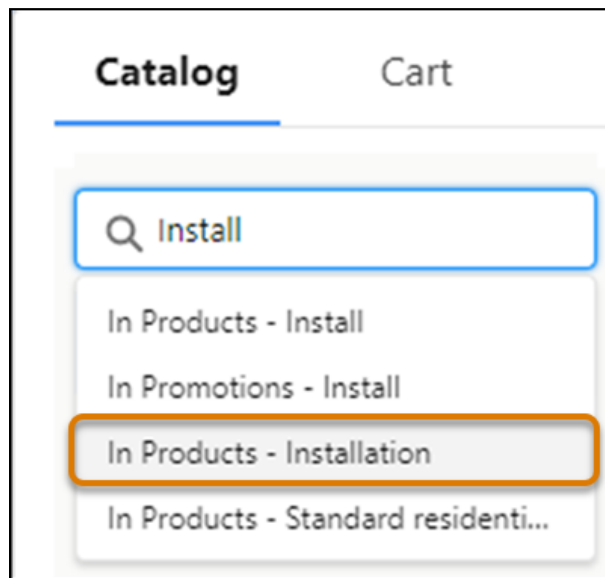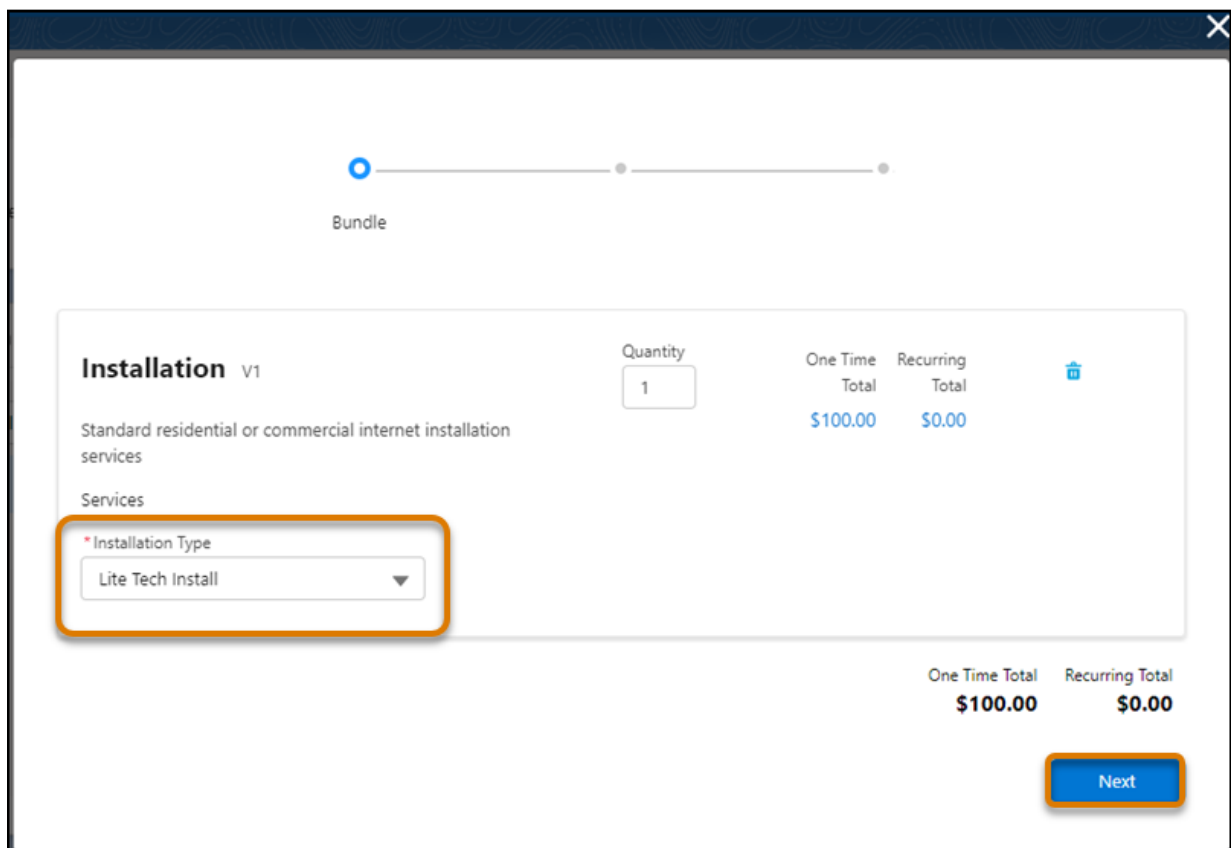
2. Configure the Installation product before adding to the cart.

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

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.
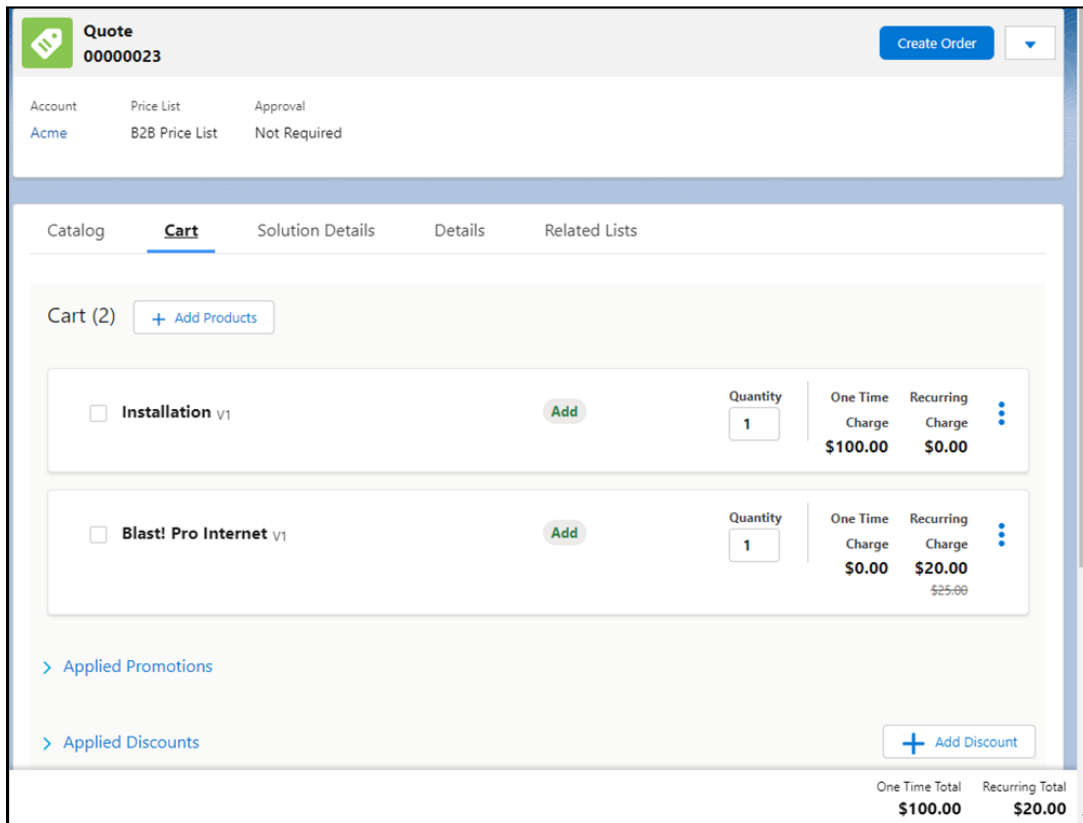
Task 4: Review the quote cart

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?

Yay! All done!