Exercise 4: Configure Products in a Quote

Scenario

Acme is impressed with how quickly Sophia is getting the solution and pricing together. Sai asks her to add three Infiwave Phone 10s in space gray with Infiwave 2 headphones to the quote. All is going well until they ask for two Infiwave Tablet 10s, to be used by their sales team. Sophia hits a snag. There's now a big error appearing on the quote. Further investigation shows that she must set the color for the tablets before moving ahead with the quote. She contacts Sai at Acme to confirm the color of the two tablets, which are prism blue. She then amends the tablet configurations to remove the errors.

Goals

- Configure items in the cart to suit customer requirements
- Configure items in bulk before adding them to the cart
- Check and fix any configuration errors

Tasks

1. Bulk add and configure the Infiwave phones and headphones
2. Add the tablets to the cart
3. Locate and fix errors in the cart
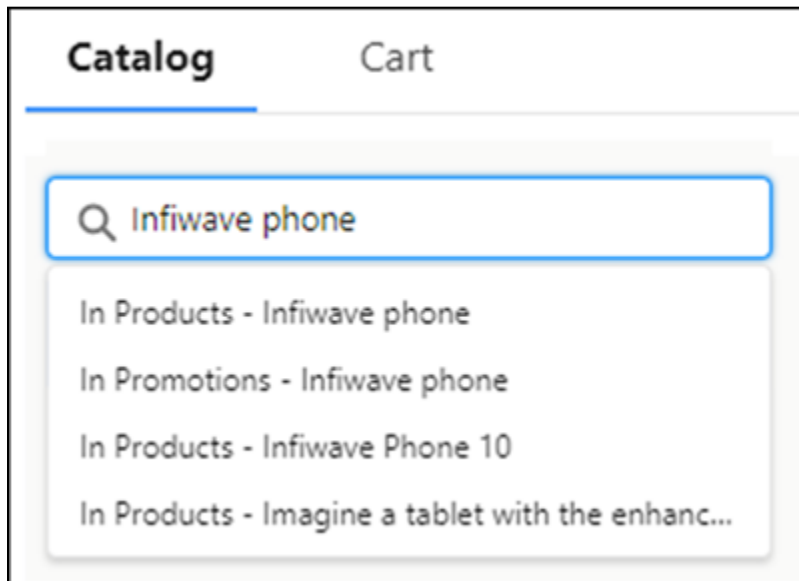
Time: 5 mins

NOTE:

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

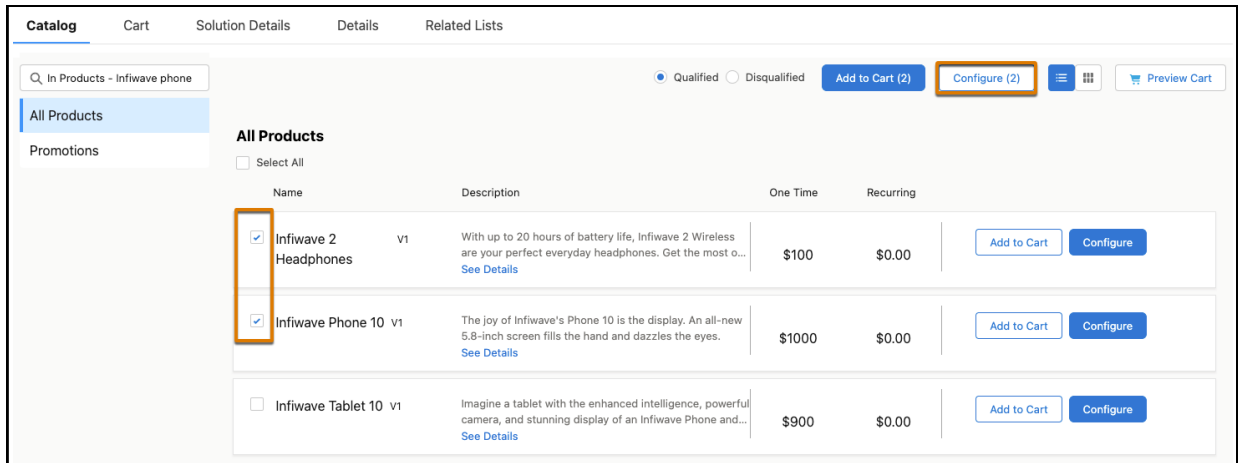## Task 1: Bulk add and configure the Infiwave phones and headphones

Sophia logs onto Salesforce Industries CPQ then locates and opens the Acme New York Office quote. From the quote catalog, she searches for Infiwave Phones, selects the Infiwave Phone 10 and Infiwave 2 headphones, then configures the number of phones and headphones to 3 and sets the phone color to space gray before adding everything to the cart.

1. If you don't have it open already, open the Acme New York Office quote and select the **Catalog** tab. If you need help to do this, refer to Exercise 3, Task 1.

2. Find the Infiwave Phone 10 and Infiwave 2 Headphones in the catalog.

a. Switch to the Catalog tab in the Acme New York Office quote workspace.
b. In the browse pane, type `Infiwave phone` in the search bar.
c. Select **In Products - Infiwave phone** from the smart-search results.
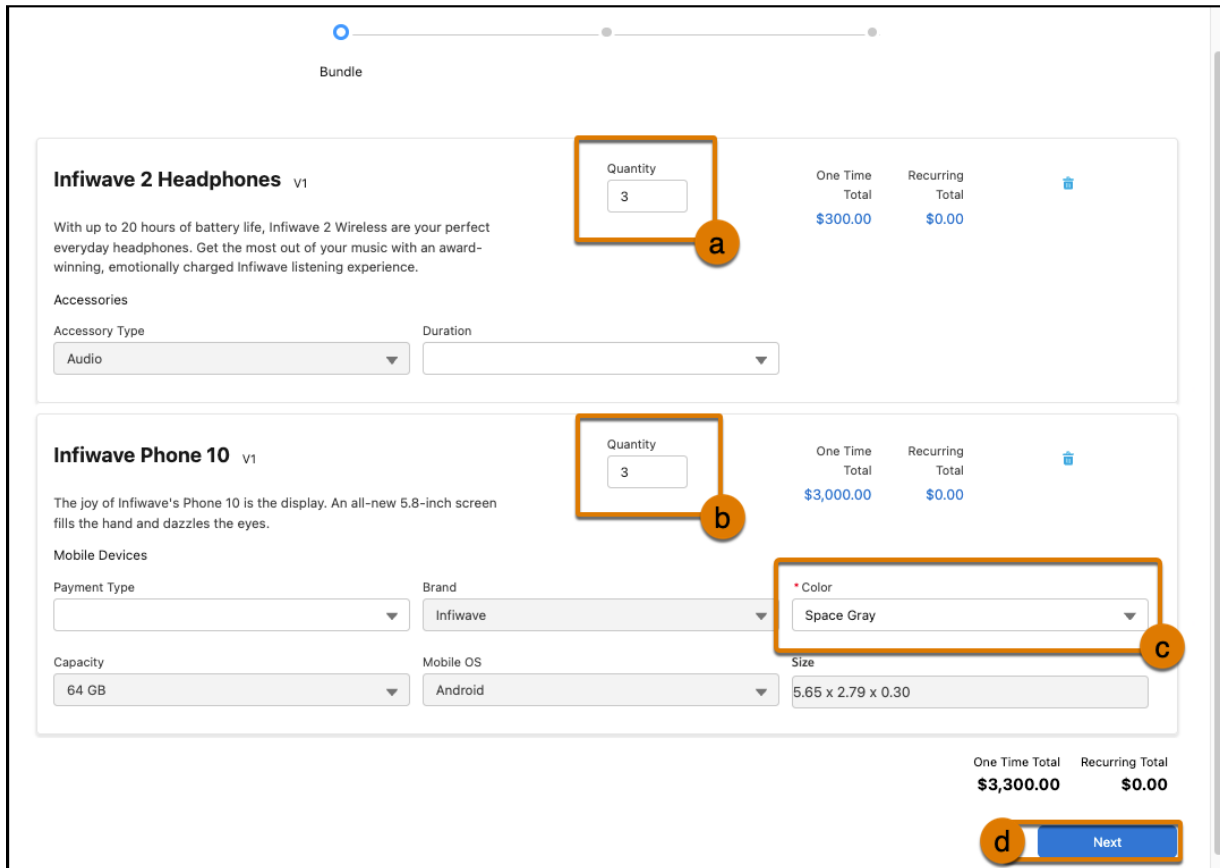
3. Select the items to add and configure.

a. Select the checkboxes for the **Infiwave 2 Headphones** and **Infiwave Phone 10** in the product list.

b. Click **Configure (2)** at the top of the product list to configure both products in one process.

4. Configure the products.
   a. Set the Infiwave 2 Headphones quantity to **3**.
   b. Set the Infiwave Phone 10 quantity to **3**.
   c. Set the Infiwave Phone color to **Space Gray**.
   d. Scroll to the bottom of the screen and click **Next** to save your changes and go to the configuration summary.
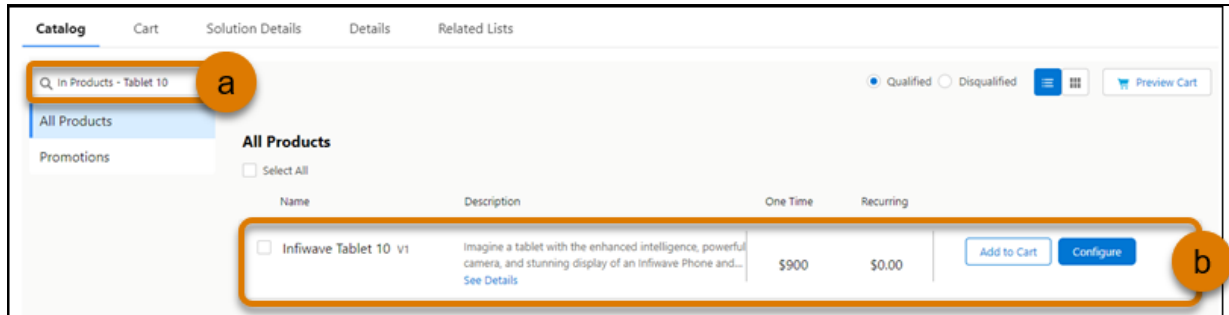

e. Review the configuration then click **Next** to add the configured products to the cart.

Note that at any time you can cancel the configuration by clicking **X** in the top right of the configuration dialog box. You can also return to the previous step by clicking **Previous**.
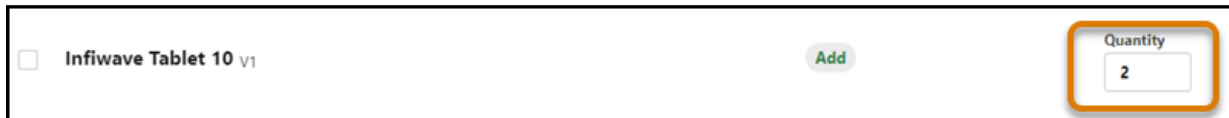
Task 2: Add the tablets to the cart

So far so good! Buoyed by her success, Sophia locates the Infiwave Tablet 10 in the catalog and adds it to the cart. She sets the total quantity of the tablets to 2.

1. In the Catalog workspace of the Acme New York Office quote, locate the Infiwave Tablet 10 and add it to the cart.

   a. Follow steps 1 and 2 in Exercise 4 Task 1 to locate the products in the catalog - but this time search for `Tablet 10` in Products.
   b. Locate the **Infiwave Tablet 10 v1** in the product list and click **Add to Cart**.

2. Set the total quantity of Infiwave Tablet 10s in the cart to 2.
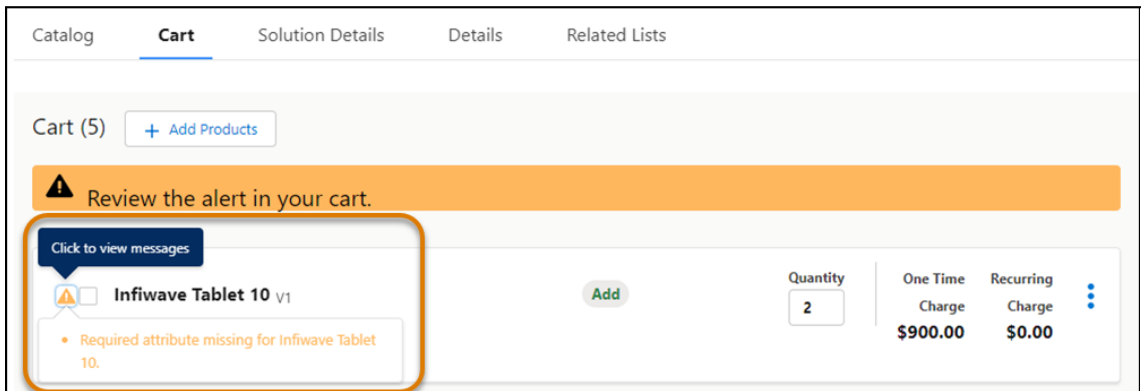

   a. Select the **Cart** tab. There's probably a big error showing at the top of the cart. Don't worry - we're going to fix that next.
   b. Locate the Infiwave Tablet 10 product in the cart. Amend the **Quantity** to 2. Notice the quote totals are adjusted for the amendment.

Task 3: Locate and fix errors in the cart

Sophia hits a snag. There's now a big error appearing on the quote. Further investigation shows that she must set the color and capacity for the tablets before moving ahead with the quote. She contacts Sai at Acme to confirm the color of the two tablets, which are prism blue, and a capacity of 512 GB. She then amends the tablet configurations to remove the errors.
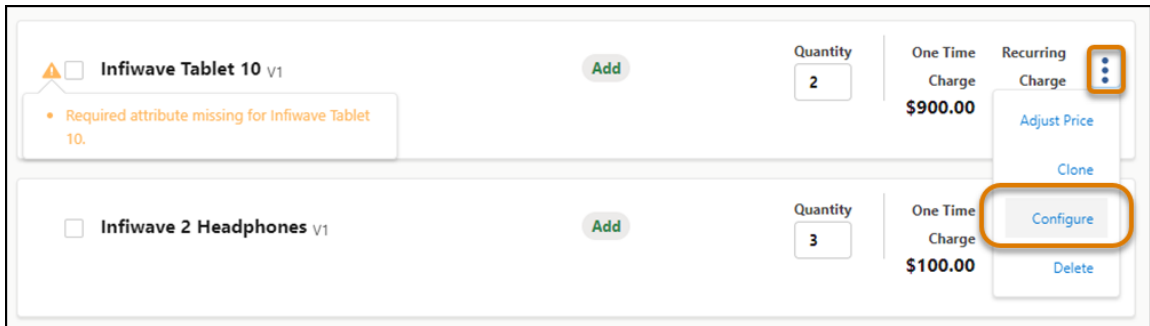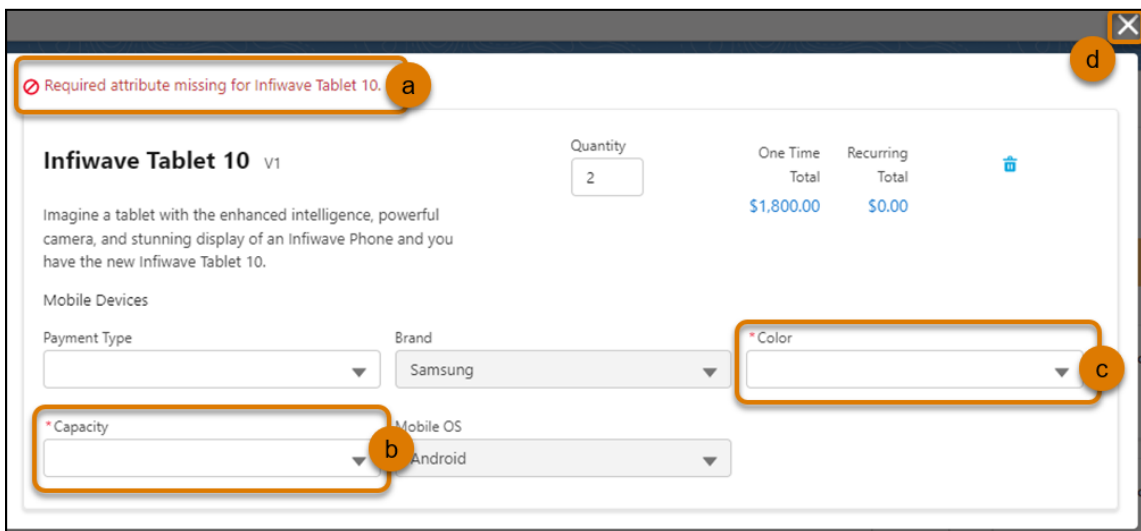
1. Locate the error.

   a. Scroll through the line items in the cart until you find the items with a warning icon ⚠.
   b. Click the warning icon to see the issue causing the error. In this example, there is some information missing from the tablet configuration. However, errors may be caused by other things such as incompatibility with the customer's existing products and services, or if this product or service is dependent on another product or service which is not currently owned or requested by the customer.
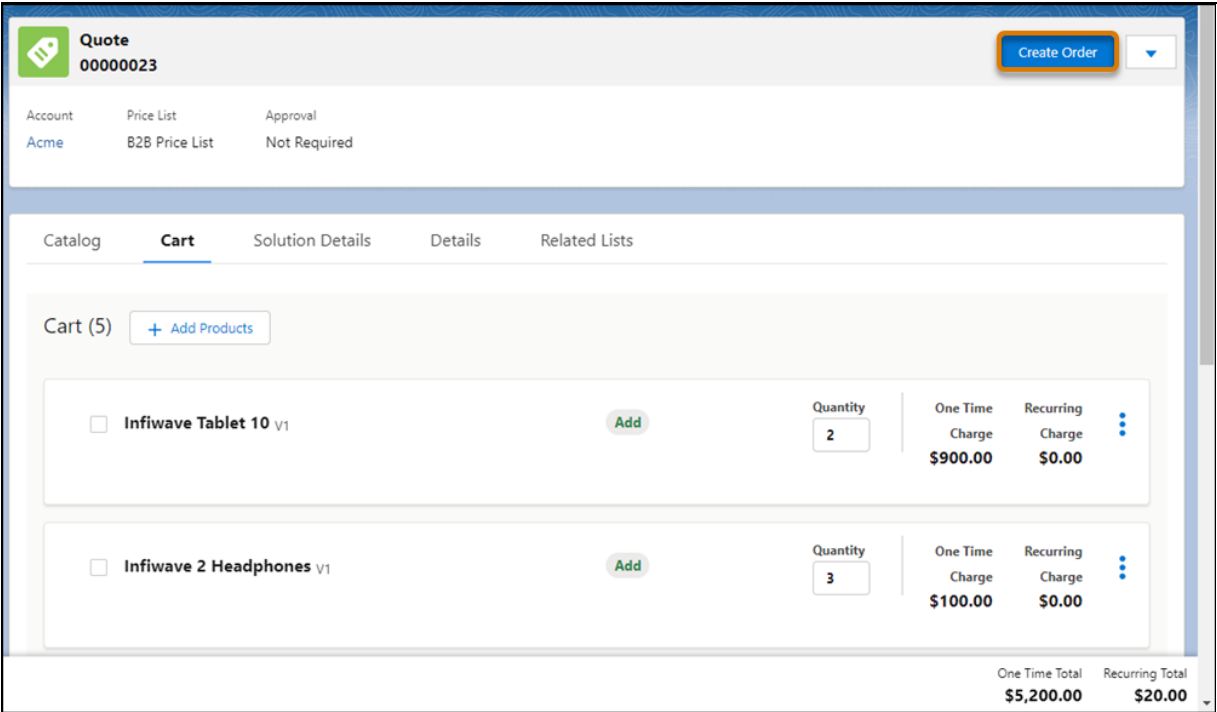
2. Check which configuration is missing.

Click the action menu for the Infiwave Tablet 10 product and select **Configure** to check the configuration.

3. Fix the error: set the Infiwave Tablet 10 color to **Prism Blue** and the Capacity to **512 GB**.

a. Note the error at the top of the configuration page for the Infiwave Tablet 10, which tells you what the problem is with the configuration. **Required attributes** are shown with red asterisks (*****). The two required attributes for this tablet are **Capacity**, and **Color**, which are both blank. Let's fix that.
b. From the **Capacity** dropdown, select **512 GB** to set the tablet storage capacity.
c. From the **Color** dropdown select **Prism Blue**.

d. Click the **X** to close the configuration page.

Notice the error message has disappeared from the top of the quote, and from the quote line item. Also, the Create Order button is active. Your quote is valid and can be converted into an order.

Yay! All done!