
Exercise 12: Create a Multisite Quote

Scenario

Acme has decided to provide its Arizona and California sales teams with new tablets. California salespeople will each receive an Infiwave Tablet 8S with an Infiwave Tablet accessory pack and Arizona salespeople will each receive an Infiwave Tablet 10 without an accessory pack. There are five salespeople at each office.

Sophia's calm. With Industries CPQ she can create complex multisite quotes quickly and easily. She tells Sai from Acme that she'll have a proposal sent to them within the next hour.

Ten minutes later Sai phones back. Acme wants to add accessory packs for the five salespeople at the Tucson office. Sophie makes the amendment and tells Sai the quote total for the Tucson Office over the phone.

Goals

- Create a multisite quote
- Create and manage quote groups
- Assign and configure products and services for quote groups
- Amend products and services for individual quote members
- Review the multisite quote

Tasks

1. Create the Acme Az and Ca Sales Tablets quote
2. Create the Arizona and California groups
3. Allocate the appropriate tablets and accessory packs to the teams
4. Amend the Tucson quote to include an accessory pack

Time: 15 mins



NOTE:

Completing your learning with Trailhead? This exercise relates to Unit 3 of the the Industries CPQ Multisite Quotes badge. Ensure you've completed this unit before you undertake Exercise 12.

Task 1: Create the Acme Az and Ca Sales Tablets quote

Sophie begins by opening the Acme account and creating a new opportunity called **Acme Sales Teams**. She then creates a new multisite quote on the opportunity called **Acme Az and Ca Sales Tablets**.

1. Create the Acme Sales Teams opportunity on the Acme account.
 - a. Open the **Acme** account.
 - b. Click the **Opportunities** quick link to open the Acme opportunities list.
 - c. In the Acme opportunities list, click **New** to create a new opportunity.
 - d. Add these details to the new opportunity for Acme.

Field	Value
Opportunity Name	Acme Sales Teams
Price List	B2B Price List
Stage	Prospecting
Number of Contracted Months	24
Close Date	[a week from today]



e. Check the details are correct then click **Save**.

New Opportunity

Opportunity Information

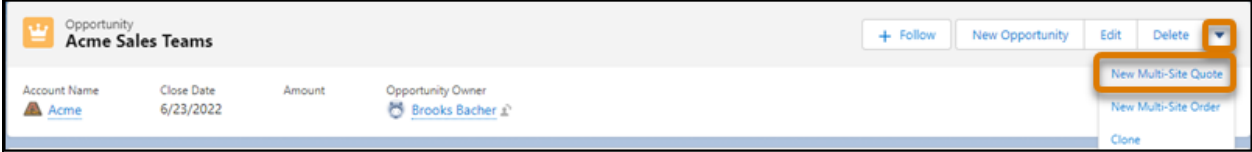
Opportunity Owner Brooks Bacher	Amount
* Opportunity Name Acme Sales Team	Number Of Contracted Months 24
* Account Name Acme	* Close Date 11/14/2022
Price List B2B Price List	Originating Channel --None--
* Stage Prospecting	
Type --None--	
Lead Source --None--	
Next Step	
Probability (%) 10%	
Validation Status Not yet run	

Validation Date

Cancel Save & New Save

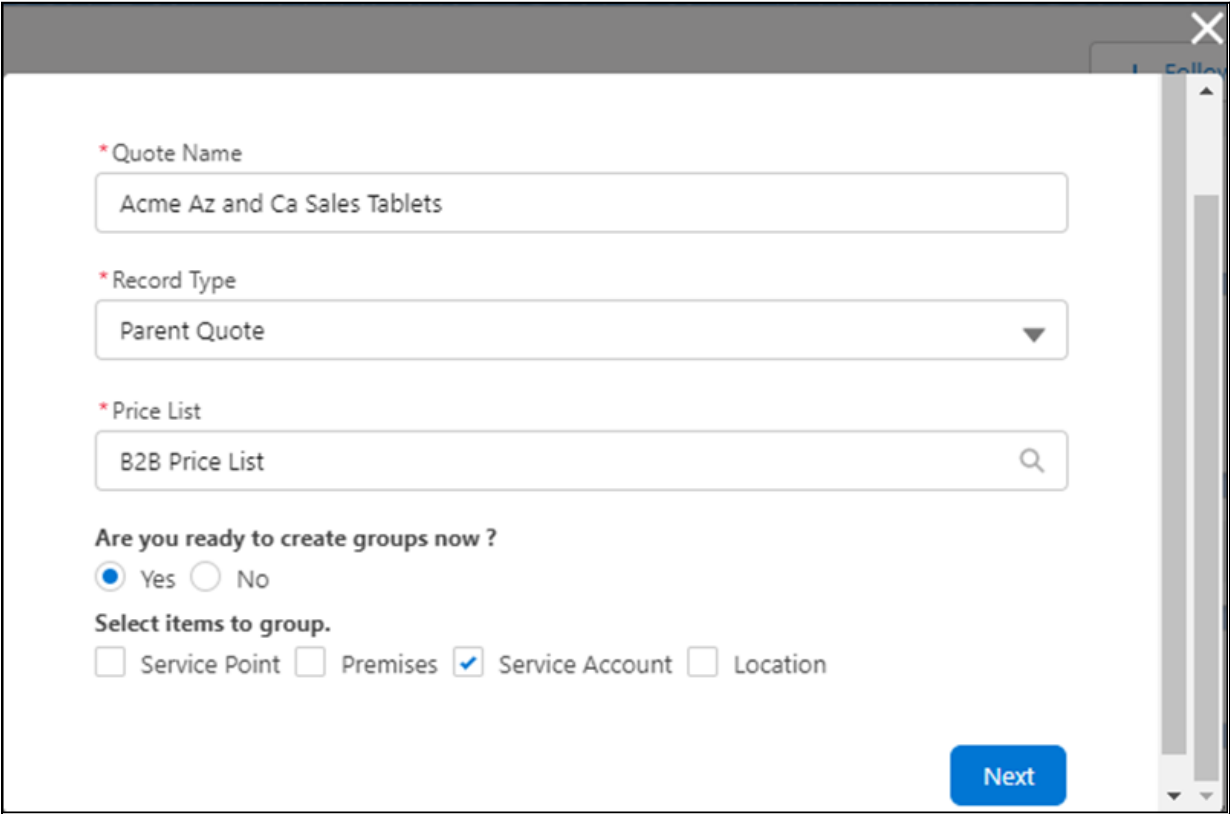


- 2. Create the Acme Az and Ca Sales Tablets multisite quote on the new opportunity, with groups created based on service accounts.



- a. On the **Acme Sales Teams** opportunity, from the action menu, select **New Multi-Site Quote**.
- b. Enter these details for the quote.

Field	Value
Quote Name	Acme Az and Ca Sales Tablets
Record Type	Parent Quote
Price List	B2B Price List
Are you ready to create groups now?	Yes
Select items to group	Service Account



*Quote Name
Acme Az and Ca Sales Tablets

*Record Type
Parent Quote

*Price List
B2B Price List

Are you ready to create groups now ?
 Yes No

Select items to group.
 Service Point Premises Service Account Location

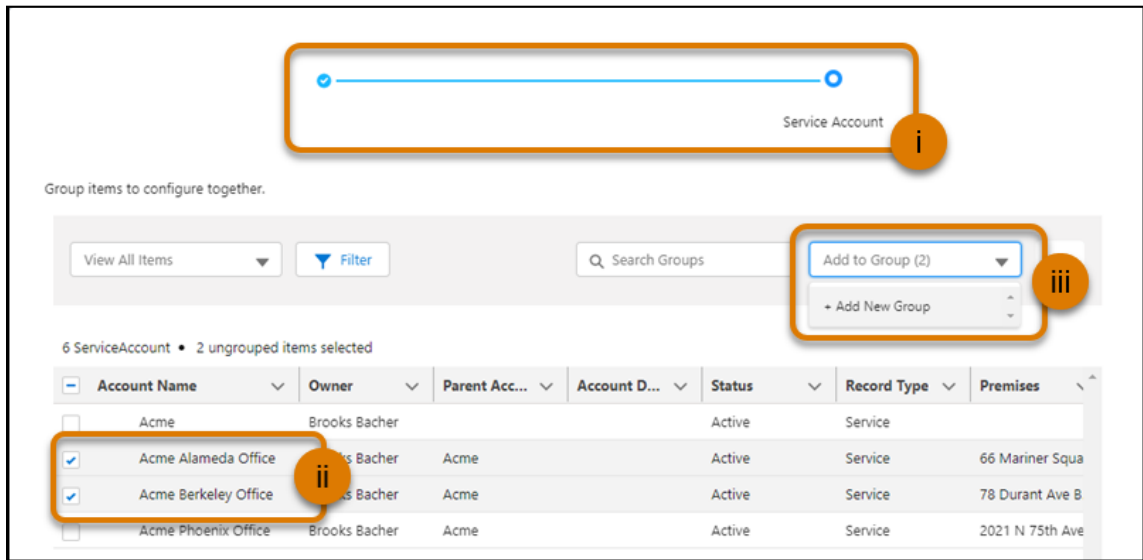
Next

c. Check you've got the details correct, then click **Next** to continue.

Task 2: Create the Arizona and California groups

Sophia wants to speed up the quote configuration process, so she adds the Acme Alameda and Berkeley offices to a group called California Offices, and the Phoenix and Tucson offices to a group called Arizona Offices.

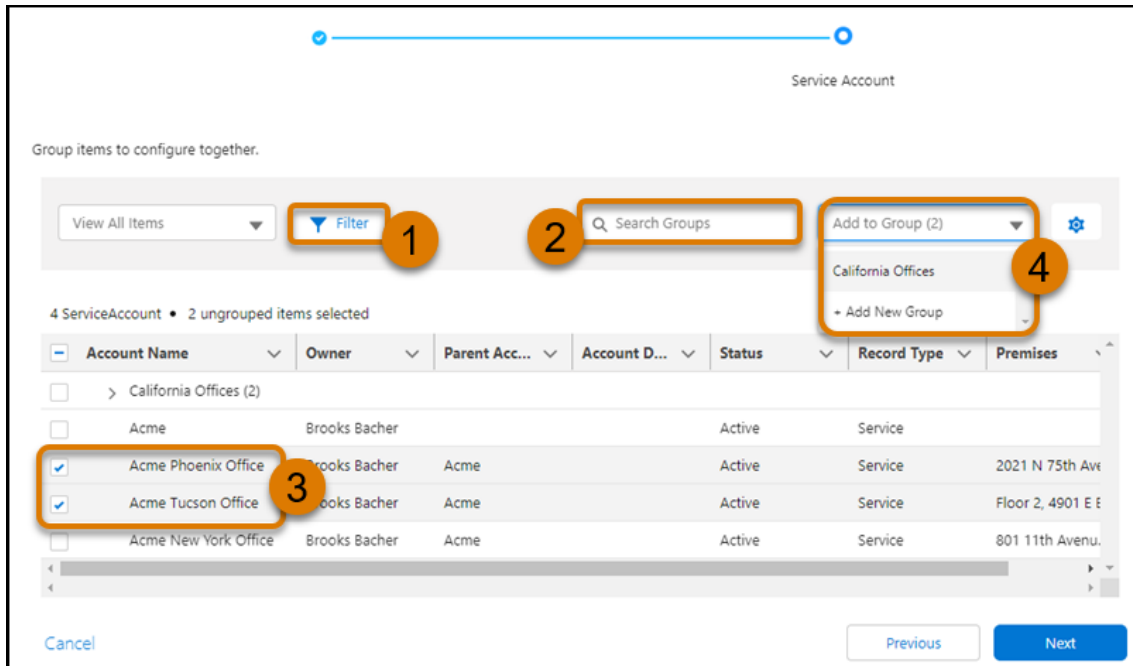
1. Create the California Offices quote group



- On the Service Points group configuration page, click **Next**.
- On the **Service Account** (i) group configuration page, select the **Acme Alameda Office** and the **Acme Berkeley Office** (ii) and click **+ Add New Group** (iii). Notice that you can use the filter to filter and locate the members to group if required.
- Enter the Group Name and Group Description shown here then click **Save**.

Field	Value
Group Name	California Offices
Group Description	Acme California Offices

2. Create the Arizona Offices quote group



- a. On the Service Account group configuration page, notice that you can filter (1) the list of service accounts to find the service account you need quickly. You can also search for the service accounts you'd like to add to groups (2).
- b. Select the **Acme Phoenix Office** and the **Acme Tucson Office** (3) and click + **Add New Group** (4).
- c. Enter the Group Name and Group Description shown here then click **Save**.

Field	Value
Group Name	Arizona Offices
Group Description	Acme Arizona Offices



You've now successfully set up the two quote groups required by Acme.

<input type="checkbox"/> Account Name	Owner	Parent Account
<input type="checkbox"/> California Offices (2)		
<input type="checkbox"/> Acme Alameda Office	Brooks Bacher	Acme
<input type="checkbox"/> Acme Berkeley Office	Brooks Bacher	Acme
<input type="checkbox"/> Arizona Offices (2)		
<input type="checkbox"/> Acme Phoenix Office	Brooks Bacher	Acme
<input type="checkbox"/> Acme Tucson Office	Brooks Bacher	Acme
<input type="checkbox"/> Acme	Brooks Bacher	
<input type="checkbox"/> Acme New York Office	Brooks Bacher	Acme

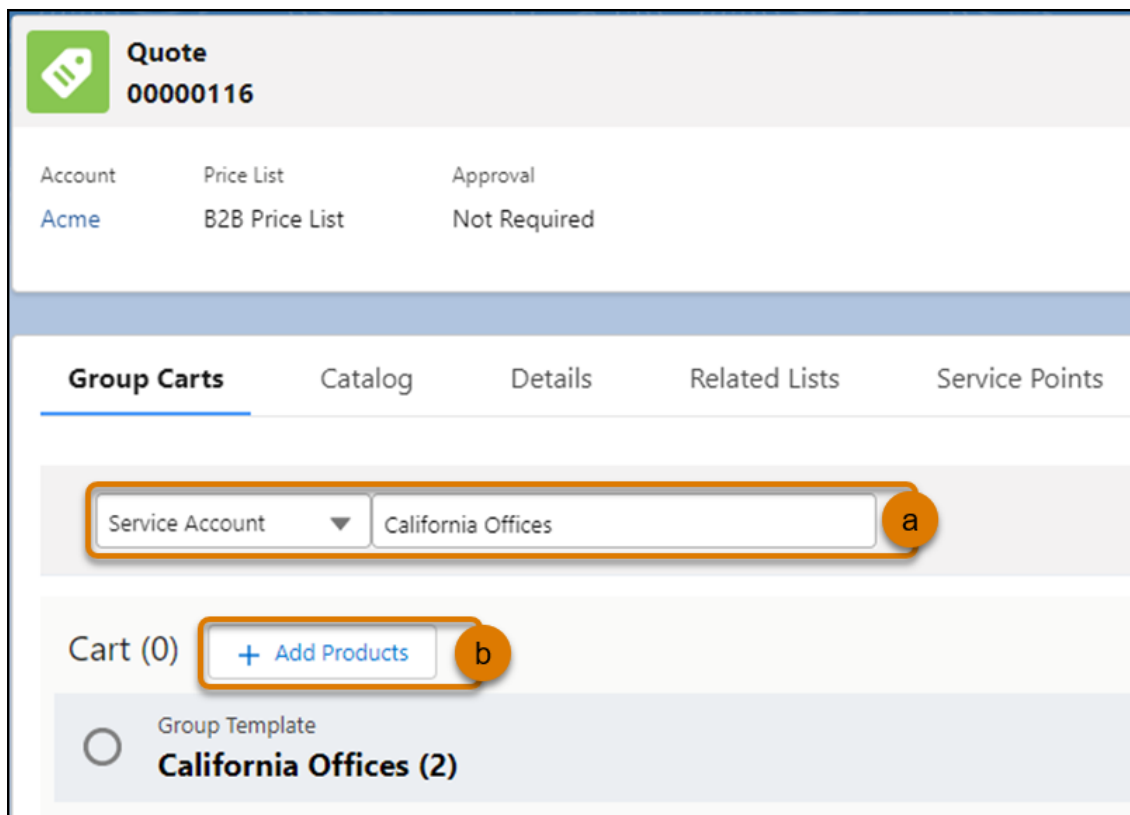
Click the expand button [>] to see details of the service accounts included in the California Offices group. Then check you have two offices included in the Arizona Offices group.

Are you happy your groups are correct? Click **Next** to continue. You're taken to the group cart to add your products and services.

Task 3: Allocate the appropriate tablets and accessory packs to the teams

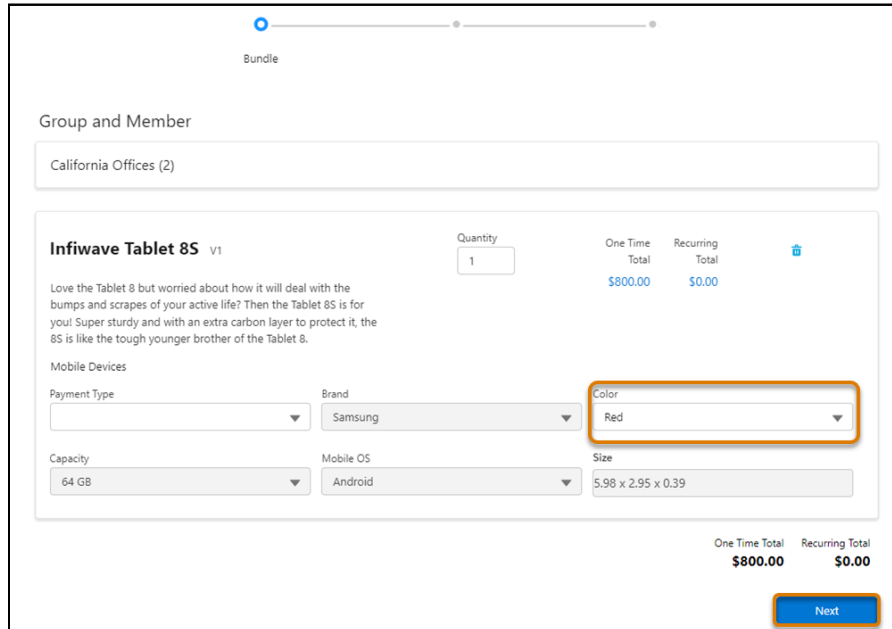
Sophia opens the California Offices group cart and adds five red Infiwave Tablet 8S products and five Infiwave Tablet accessory packs. She validates the quote and checks the prices before moving onto the Arizona Offices group, where she adds five blue Infiwave Tablet 10s.

1. Add and configure five red Infiwave Tablet 8S's in the California Offices group cart.



- a. From the Group Carts workspace, select the type of group you're accessing. In this case, it's **Service Account**. Then pick the **California Offices** group from the groups list. Notice the California Offices title appears in the group cart.
- b. Click **+ Add Products** to add products to your group cart.

- c. Locate the **Infiwave Tablet 8S** in your product catalog using the search in the browse pane. Click **Configure** to configure the Tablet 8S before adding it to the group cart.



Bundle

Group and Member

California Offices (2)

Infiwave Tablet 8S v1

Quantity: 1

One Time Total: \$800.00

Recurring Total: \$0.00

Mobile Devices

Payment Type: [Dropdown]

Brand: Samsung

Color: Red

Capacity: 64 GB

Mobile OS: Android

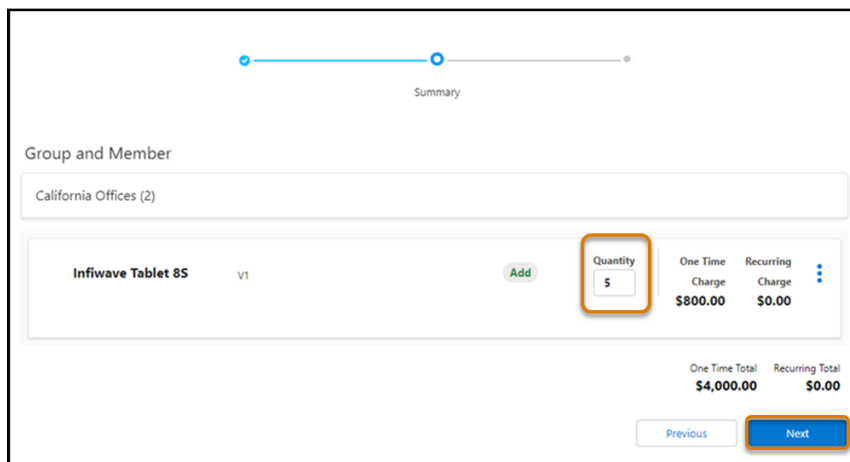
Size: 5.98 x 2.95 x 0.39

One Time Total: \$800.00

Recurring Total: \$0.00

Next

- d. Set the **Color** to **Red**.
- e. Click **Next** to continue.
- f. Set the **Quantity** of tablets to **5**. The one-time total updates to show the charge for all five tablets.



Summary

Group and Member

California Offices (2)

Infiwave Tablet 8S v1

Add

Quantity: 5

One Time Charge: \$800.00

Recurring Charge: \$0.00

One Time Total: \$4,000.00

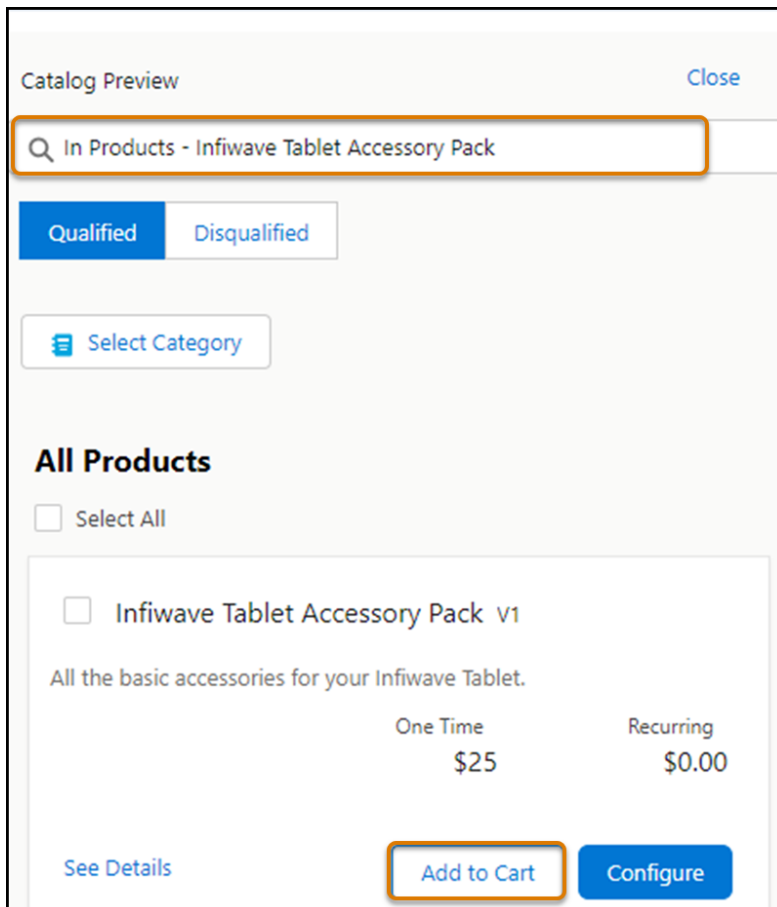
Recurring Total: \$0.00

Previous

Next

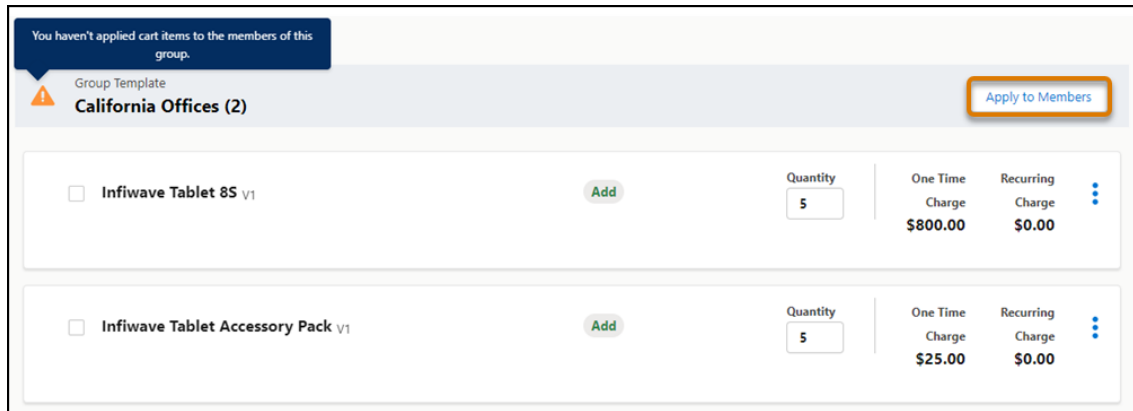
- g. Click **Next** to add the tablets to the cart.

2. Add five Infiwave Tablet Accessory Pack to the California Offices group cart.



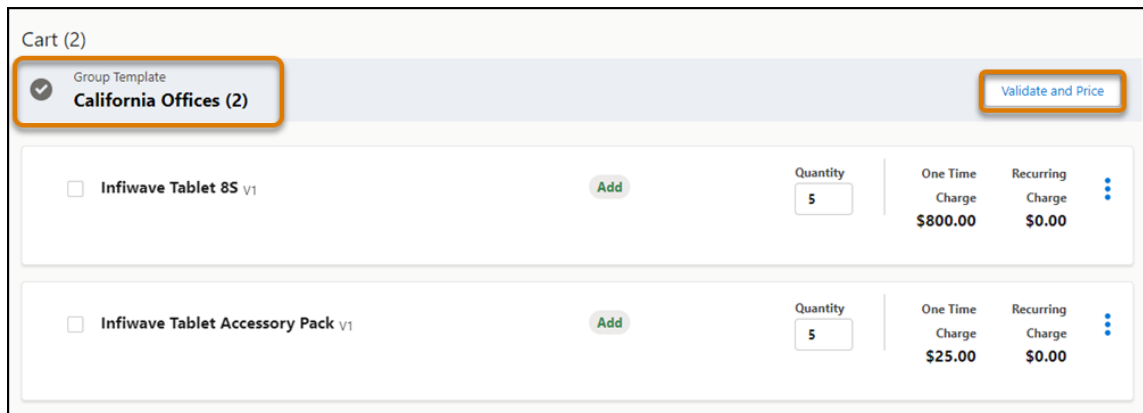
- a. Locate the **Infiwave Tablet Accessory Pack** in your product catalog using the search in the browse pane.
- b. Click **Add to Cart**.
- c. For the Infiwave Tablet Accessory Pack in the group cart, amend the quantity to **5**.

3. Apply the cart contents to the quote group members.



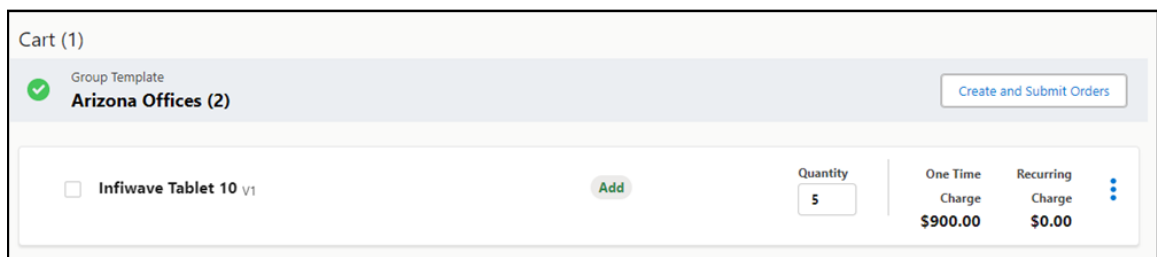
- Notice there's a warning triangle symbol to the left of the group name. Hover over the symbol to identify the problem. Industries CPQ is reminding you that you haven't yet applied the products in the cart to the group members.
- Click **Apply to Members** to apply the products in the group cart to the California Office group members.
- A confirmation message is displayed and you receive a notification message to confirm the products have been added to the group. A gray check mark appears to the left of the group name.

4. Validate and price the quote.

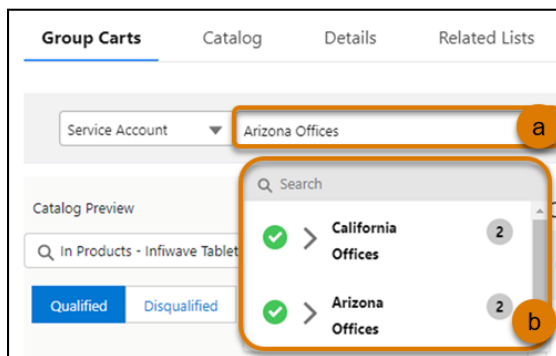


- Notice the symbol to the left of the group name has changed from a warning symbol to a gray checkmark. Hover over the checkmark to confirm the products have been applied to the group.

- b. Click **Validate and Price** to validate the products applied to the group and price the quote. Validation and pricing may take a few seconds to complete.
 - c. A message is displayed confirming the validation and pricing was successful. You also receive a notification confirming validation and pricing success. The symbol beside the group name changes to a checkmark to indicate the quote is valid for this group.
5. Ready to try it on your own? Follow steps 1, 3, and 4 to add five Infiwave Tablet 10 products with the color Prism Blue and 512 GB capacity to the Arizona Offices group, apply to the group members, then validate and price the quote.



6. Check the validation status of the groups and members.

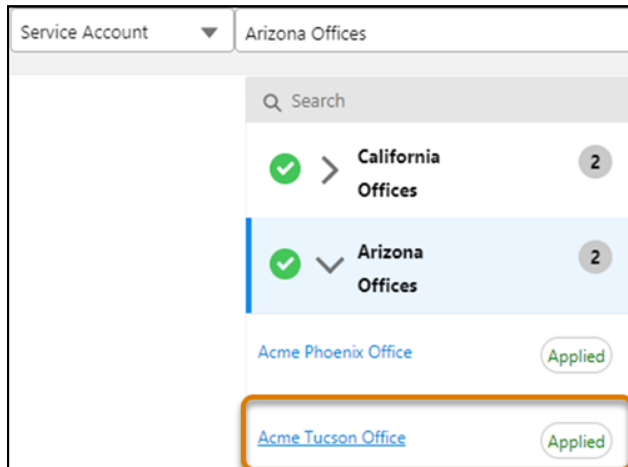


- a. Click the **group selection menu**.
- b. Notice the groups have check marks beside them, indicating they're valid and ready to submit.
- c. Expand each group to see its members. Notice each member has a green **Applied** status.
- d. Click a group member. Notice you're taken to the individual member's quote cart, rather than a group cart, where you can view and amend what has been applied to this group member.

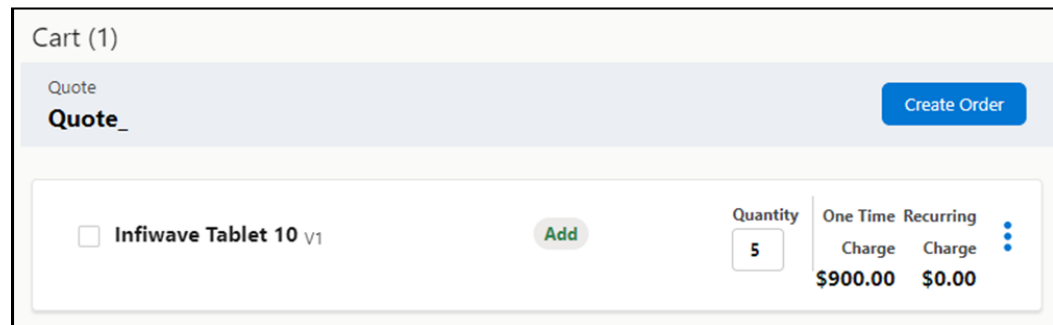
Task 4: Amend the Tucson quote to include an accessory pack

Acme wants to change the quote for just one member, adding Infiwave Tablet Accessory Packs for the five salespeople at the Tucson office. Sophie makes the amendment and tells Sai the quote total over the phone.

1. Select the Acme Tucson Office from the Arizona Office group in the group cart.



- a. From the group menu, select the **Service Account** type then select the **Arizona Offices** group.
- b. Click expand > on the **Arizona Offices** from the group menu to view the members of the Arizona Offices quote group.
- c. Click **Acme Tucson Office** to open the quote cart for the Tucson office.



2. Locate the **Infiwave Tablet Accessory Pack** in the catalog and click **Add to Cart** to add it to the cart.



3. Set the Infiwave Tablet Accessory Pack Quantity to 5.

Cart (2)

Quote [Create Order](#)

Quote_

<input type="checkbox"/>	Infiwave Tablet Accessory Pack	V1	Add	Quantity <input type="text" value="5"/>	One Time Charge \$25.00	Recurring Charge \$0.00	⋮
<input type="checkbox"/>	Infiwave Tablet 10	V1	Add	Quantity <input type="text" value="5"/>	One Time Charge \$900.00	Recurring Charge \$0.00	⋮

4. Check the cart. Notice that because this is a cart for just one office you don't need to Add to Members or Validate and Price. Industries CPQ does the validation and pricing automatically.

What's the total value of the Tucson Office quote?

One Time Total	\$
Recurring Total	\$



5. Click the **Service Accounts** tab.

<input type="checkbox"/>	Account Name	Owner	Parent Account	Account Description	Status
<input type="checkbox"/>	> California Offices (2) ✓				
<input type="checkbox"/>	∨ Arizona Offices (2) ⚪				
<input type="checkbox"/>	Acme Phoenix Office ✓	Industries Admin	Acme		Active
<input type="checkbox"/>	Acme Tucson Office ⚪	Industries Admin	Acme		Active

Notice the California Offices have green check marks beside them to show they've been validated and priced, but the Arizona Offices group does not. Expand the Arizona Offices list and you'll see why. The Acme Phoenix Office has been validated and priced as part of the group, but the Acme Tucson office has been independently priced, so it shows a gray checkmark.



6. On the Related Lists tab, check out the quotes that have been created.

The screenshot shows a Salesforce interface with a navigation bar at the top containing tabs for "Group Carts", "Catalog", "Details", "Related Lists" (which is selected and underlined), and "Service Points". Below the navigation bar, there is a section titled "Quotes (6)" with a green icon of a document with a pencil. Underneath this section is a table with two columns: "Quote Name" and "Opportunity Name". The table contains six rows of data, each with a blue hyperlink for the quote name and the text "Acme Sales Teams" for the opportunity name.

Quote Name	Opportunity Name
California Offices	Acme Sales Teams
Arizona Offices	Acme Sales Teams
Quote_Acme Alameda Office	Acme Sales Teams
Quote_Acme Berkeley Office	Acme Sales Teams
Quote_Acme Phoenix Office	Acme Sales Teams
Quote_Acme Tucson Office	Acme Sales Teams

Notice there are two group quotes, for the California and Arizona office groups, then a member quote for each office.



Yay! All done!