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Salesforce Certified CPQ Specialist

Salesforce CPQ-Specialist

Version Demo

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Topic Break Down

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QUESTION NO: 1

Universal Containers wants to change its $500 maintenance product to be based on a percentage of subscription products in the Storage product family.

The maintenance product has been updated to be priced Of Total and the percentage has been set.

How should the product records be altered to meet this requirement?

A. Set the maintenance product Include in Percent of Total to True. On all storage subscription products, set the Percent Of Total Category to Storage and set Include in Percent of Total to True.

B. Set the maintenance product Percent Of Total Category to Storage and set Include in Percent of Total to True. On all Storage subscription products, set the Percent Of Total Category to Storage.

C. Set the maintenance product Percent Of Total Category to Storage. On all Storage subscription products, set the Percent Of Total Category to Storage and set Include in Percent of Total to True.

D. subscription products, set the Percent Of Total Category to Storage.

E. Set the maintenance product Percent Of Total Category to Storage. On all Storage subscription products, set the Percent Of Total Category to Storage and set Exclude From Percent of Total to False.

ANSWER: C

Explanation:

Set the maintenance product Percent Of Total Category to Storage. On all Storage subscription products, set the Percent Of Total Category to Storage and set Include in Percent of Total to True. This configuration establishes a shared category that defines both the target of the maintenance calculation and the quote lines that form its calculation base. The maintenance product uses its Percent Of Total Category value to identify which eligible lines it should evaluate. Each Storage subscription product must carry that same category and be explicitly included in the percent-of-total calculation, so its quote-line amount contributes to the total on which maintenance is calculated. When users add eligible Storage subscription products to a quote, Salesforce CPQ totals the included matching lines and applies the configured percentage on the maintenance product. This supports a maintenance charge that automatically scales as the value of the applicable Storage subscriptions changes, rather than retaining the former fixed $500 price. The product configuration therefore keeps the maintenance product as the calculated item while identifying the Storage subscriptions as the contributing products. Salesforce documents this behavior in its Percent of Total guidance and its CPQ product fields reference.

QUESTION NO: 2

Universal Containers uses Contracted Pricing to set pricing for specific distributors and those distributors' business units (child accounts). Product A has a product family of Storage and a list price of $300. The parent account has a Contracted Price set to $200 and a filter based on the product family of Storage. Which two ways can the Admin set Product A back to list price on a business unit account?

A. Set Ignore Parent Contracted Prices to true on the parent contracted price.

B. Create a new contracted price for Product A on the business unit account with a price of $300.

C. Create a new contracted price record for Product A on the business unit account and set its Ignore Parent Contracted prices to true.

D. Set Ignore Parent Contracted Prices to true on the business unit account record.

ANSWER: B D

Explanation:

Creating a new contracted price for Product A on the business unit account with a price of $300 is a valid way to restore list pricing for that product at that specific child account. Contracted prices can be defined for an individual account, and the child account's directly assigned contracted price takes precedence over pricing inherited through its account hierarchy. By

explicitly setting the child account's price to the product's $300 list price, the administrator preserves contracted-pricing behavior while establishing the required account-specific exception.

Setting Ignore Parent Contracted Prices to true on the business unit account record is also valid. This account-level setting prevents Salesforce CPQ from considering contracted prices inherited from parent accounts when pricing quotes for that business unit. Consequently, the parent's $200 contracted price, including its Storage product-family filter, is not applied to the child account. With no applicable child-level contracted price or other price rule changing the price, CPQ uses the product's list price of $300. This setting is particularly useful where a business unit should not inherit any of the parent account's negotiated pricing arrangements rather than requiring exceptions product by product. See Salesforce's Contracted Pricing documentation and the Salesforce CPQ Pricing and Discounts Trailhead module.

QUESTION NO: 3

An admin is working on a Primary Quote attached to an Opportunity. The nice Book and Currency on the Quote and Opportunity match. However, only some of the Products from the Quote are being synced to the Opportunity, 9nd aero emor messages are displayed.

Which three reasons explain why these Products failed to create Opportunity Products?

Choose 3 srewers

A. Some Products were missing Price Book Entries.

B. Only Products with an Effective Quantity greater than zero sync to the Opportunity.

C. Validation Rules on the Opportunity Product silently fail.

D. Exclude from Opportunity is checked on the Product record.

ANSWER: A B D

Explanation:

Some Products were missing Price Book Entries is a valid cause because an Opportunity Product must be associated with a Price Book Entry for its product in the Opportunity's assigned price book. Matching price books and currencies at the Quote and Opportunity level does not by itself ensure that every quoted product has an eligible entry available in that book. Only Products with an Effective Quantity greater than zero sync to the Opportunity is also correct: Salesforce CPQ uses effective quantity when determining whether a quote line represents a sellable quantity that should create an Opportunity Product. Quote lines whose effective quantity is zero are omitted from the synchronization result. Finally, Exclude from Opportunity is checked on the Product record directly instructs CPQ not to create an Opportunity Product for quote lines using that product. This setting is useful for items that should appear on a customer-facing quote but should not be represented in the Opportunity's product list. These conditions can therefore result in only a subset of quote lines syncing without changing the quote's primary status or its matching price book and currency context. See the Salesforce CPQ Administration Guide and Salesforce's OpportunityLineItem object reference.

QUESTION NO: 4

Universal Containers has a Quote that contains a Quote Line associated to an Asset Product in addition to another Quote Line.

Which property must be present on the additional Quote Line to create a Subscribed Asset at the time of Contract generation?

A. Subscription Pricing equals Percent Of Total

B. Pricing Method equals Percent Of Total

C. Package equals True

D. Bundled equals True

ANSWER: A

Explanation:

Subscription Pricing equals Percent Of Total is required because the additional quote line must be identified as a subscription-priced percent-of-total line for Salesforce CPQ to carry its subscription behavior through contracting and create the associated subscribed asset. The Subscription Pricing field controls how CPQ treats the product's subscription charge, including whether that recurring charge is calculated as a percentage of designated quote-line totals. When the quote is contracted, CPQ uses the quote line's subscription information to create the appropriate subscription and asset relationship, rather than treating the line merely as a one-time calculated charge.

Percent-of-total subscription products are commonly used for recurring services, such as support or administration, whose price is based on the value of other products on the quote. Setting Subscription Pricing to Percent Of Total ensures that the line is configured as a subscription percent-of-total charge and retains the necessary subscription context at contract generation. Salesforce documents percent-of-total product configuration, including the distinction between percent-of-total pricing and percent-of-total subscription pricing, at Salesforce Help: Percent of Total Products. For the broader CPQ contracting process that generates subscription and asset records, see Salesforce Trailhead: Contracts and Renewals.

QUESTION NO: 5

A sales rep at Universal Containers is trying to determine why a new Contract was unable to be created from a recently contracted Order. The sales rep has confirmed that the Order is for a new customer. This is the sales reps first attempt to contract the Order.

What are three troubleshooting steps an admin should take to identify the issue7

Choose 3 answers

A. Confirm that each of the Order Products have been activated.

B. Ensure the Order Start Date is later than the Opportunity Close Date.

C. Check recent Apex Jobs to identify any errors in the contracting process.

D. Verify that the related Opportunity is in Closed/Won status.

E. Ensure there is at least one subscription-based Order Product on the Order.

ANSWER: A C E

Explanation:

"Confirm that each of the Order Products have been activated," "Check recent Apex Jobs to identify any errors in the contracting process," and "Ensure there is at least one subscription-based Order Product on the Order" are the appropriate checks. CPQ contracting processes the order's subscription products to create the subscription and contracted-price records associated with a new contract. Therefore, the order must contain at least one line that represents a subscription product; a one-time-only order provides no subscription record for CPQ to contract. The products represented by the order lines must also be active and available for the contracting transaction to process reliably. In practice, an administrator should validate the active status of the underlying Product records and applicable price book entries for the order products. Finally, contracting can invoke asynchronous Apex and custom automation. Reviewing recent Apex Jobs is an effective diagnostic step because job failures and exception details can identify automation, validation, integration, or trigger behavior that interrupted creation of the Contract and related CPQ records. Salesforce's CPQ documentation describes how CPQ uses subscription records during contracting, and Salesforce's product documentation covers maintaining active products for use in transactions. See Salesforce CPQ contracting documentation and Activate Products in Salesforce.

QUESTION NO: 6

A user is unable to see a particular Product on the Product Selection screen when clicking Add Products.

What are two potential reasons the Product is unavailable

Choose 2 answers

A. The Hidden checkbox on the Product record is set to TRUE.

B. The Add Products button has a Custom Action Condition associated to it.

C. The Component checkbox on the Product record is set to TRUE.

D. The Add Products button has a Search Filter associated to it.

ANSWER: C D

Explanation:

The Component checkbox on the Product record is set to TRUE because component products are intended to be included as parts of bundles rather than selected independently by users. Salesforce CPQ treats these products as bundle components, so they are added through the bundle configuration process when the applicable parent bundle is selected. This supports controlled bundle composition and prevents users from separately choosing products that are designed to be sold only within a configured package.

The Add Products button has a Search Filter associated to it because CPQ search filters restrict the product results available from a product-selection action. A search filter can evaluate product fields and, where configured, related quote or account data. The product must satisfy the filter criteria to be returned on the Product Selection page. Consequently, an active product can still be absent from the Add Products results when it does not meet the action's search-filter conditions. Salesforce documents search filters as a way to limit the products users can find and select, while its product-configuration guidance describes the role of components in bundles. See Salesforce CPQ Search Filters and Salesforce CPQ Product Configuration.

QUESTION NO: 7

Universal Containers has a slab Discount Schedule for Product A with these Discount Tiers:

Name	Lower	Upper	Discount
First Level	1	11	10%
Second Level	11	21	25%
Third Level	21	-	50%

If Product A has a List Price of $100.00, what is the Net Total for a Quote Line with the quantity of 21?

A. $1,050.00

B. $1,725.00

C. $1,700.00

D. $1,575.00

ANSWER: A

Explanation:

$1,050.00 is correct because a Salesforce CPQ slab discount schedule applies the discount from the one tier containing the quote line's total quantity to every unit on that line. The quantity is 21, which falls in the displayed tier that provides a 50% discount. Product A's $100.00 list price is therefore reduced by 50%, producing a net unit price of $50.00. Multiplying that net unit price by all 21 units gives a Net Total of $1,050.00 (21 × $50.00). This calculation reflects the defining behavior of a slab schedule: the qualifying quantity determines a single discount rate for the full quantity, rather than pricing portions of the quantity separately across multiple tiers. Salesforce CPQ uses discount schedules to automate quantity-based pricing, and the schedule's type determines how the tier discounts are applied. See Salesforce's documentation on discount schedules and the CPQ product documentation at Salesforce CPQ product configuration and pricing.

QUESTION NO: 8

Universal Containers (UC) created a Custom Action called Add Subscriptions and a Search Filter for Products flagged as subscription Products.

How can UC ensure that sales reps are restricted to subscription Products when the reps click on the Custom Action called Add Subscriptions?

A. Set the Filter value on the Add Subscriptions Search Filter to True and mark the Hidden checkbox on the subscription Search Filter to True.

B. Remove the Subscription flag from the Productâ€™s Search Filters Field Set.

C. Remove the Subscription flag from the Productâ€™s Search Results Field Set.

D. Set the Filter Value on the Add Subscriptions Search Filter to Hidden.

ANSWER: A

Explanation:

Set the Filter value on the Add Subscriptions Search Filter to True and mark the Hidden checkbox on the subscription Search Filter to True. A Salesforce CPQ search filter can constrain the products returned by the product-selection search that a custom action opens. Here, the filter should evaluate the product's subscription flag as true, so the product search is limited to records designated as subscription products. Setting the filter's value to True supplies the required criterion for the Boolean subscription field.

Marking the filter as hidden is equally important because the criterion becomes enforced rather than exposed as an editable search control. Sales reps therefore cannot clear, change, or bypass the subscription criterion while using the Add Subscriptions action. The action consistently opens a product-selection experience containing only products that meet the predefined subscription condition. This approach keeps the restriction in the CPQ search configuration, where it applies every time the custom action is used, while still allowing administrators to manage the filter centrally. Salesforce CPQ's product-selection and search-filter capabilities are designed to control the set of products users can find and add during configuration. See Salesforce's CPQ product search filter documentation and the Salesforce CPQ Features Trailhead module.

QUESTION NO: 9

Universal Containers (UC) has set the CPQ package settings of both Subscription Term Unit and Subscription Prorate Precision to Month. UC wants to quote a Fixed Price Subscription Product with a Start Date of June 18, 2019 and an End Date of August 21, 2020.

The Product record has a Subscription Term of 12, a Pricing Method of List, and a Pricebook Entry of USD 100.

What is the Prorated List Unit Price for the Quote Line?

A. USD 118.31

B. USD 116.67

C. USD 125.00

D. USD 100.00

ANSWER: B

Explanation:

USD 116.67 is correct because Salesforce CPQ uses the package-level Subscription Term Unit and Subscription Prorate Precision settings to derive the subscription's prorate multiplier. With both settings set to Month, CPQ determines the quote line's term in whole months. The period from June 18, 2019 through August 21, 2020 is treated as 14 months under month precision. The product's Subscription Term establishes that its USD 100 list price represents a 12-month subscription. CPQ

therefore calculates the prorated list unit price by multiplying the list price by the ratio of the quoted term to the product term: USD 100 × 14 ÷ 12 = USD 116.666..., which is rounded to the currency precision of USD 116.67. This is the unit price that CPQ uses for the fixed-price subscription line before any applicable discounts or additional pricing adjustments. Salesforce CPQ's subscription-proration behavior is controlled by the subscription term and prorate precision package settings, as described in Salesforce CPQ subscription proration documentation and the Salesforce CPQ package settings documentation.

QUESTION NO: 10

Universal Containers (UC) has a Product Family called Software. When a Configuration Attribute in the bundle is set to Perpetual, UC wants to Hide all Products with the Product Family called Software.

The Admin has created a Product Rule with a Configuration Rule.

Which additional supporting records should the Admin configure so the Product Rule meets this requirement?

A. An Error Condition should check the Product Family value on the Product Option record. A Product Action using the Filter Field should Hide the Products.

B. An Error Condition should compare the Product Family value on the Product Option record. A Product Action should Show all Products with Product Family other than Software.

C. An Error Condition should compare the Perpetual value against the Configuration Attribute. A Product Action should Hide each Product.

D. An Error Condition should compare the Perpetual value against the Configuration Attribute. A Product Action using the Filter Field should Hide the Products.

ANSWER: D

Explanation:

An Error Condition should compare the Perpetual value against the Configuration Attribute. A Product Action using the Filter Field should Hide the Products.

is correct because a configuration rule needs both a condition that determines when the rule evaluates as true and an action that changes the configurator's available options. The Configuration Attribute is the stated trigger, so the Error Condition must evaluate that attribute's value and fire when it is set to *Perpetual*. In CPQ, Error Conditions on product rules can reference configuration attributes so that the rule responds to a user's bundle-selection choices.

Once the condition is met, the Product Action performs the requested result: hiding products. Rather than maintaining a separate action or explicit product selection for every Software product, the action can use its Filter Field capability to target the shared Product Family field, with the applicable filter value of Software. This makes the rule apply consistently to all matching options and reduces ongoing administration when products are added to that family. The action type is Hide, so the matching products are removed from the user's available selections while the Perpetual attribute value is in effect.

For Salesforce CPQ product-rule concepts and the relationship between conditions and actions, see Salesforce Help: Product Rules and Salesforce Help: Configuration Rules.

QUESTION NO: 11

An admin sets Asset Conversion for a non-subscription Product A to "One per unit." A sales rep creates a quote that includes Product A with a quantity of 2. Sales Operations creates an order from the quote, then creates a contract from the order, then creates a renewal opportunity from the contract.

Which object(s) show multiple records related to Product A?

A. Asset and Order Product

B. Order Product

C. Asset and Opportunity Product

D. Asset

ANSWER: C

Explanation:

Asset and Opportunity Product is correct. The Asset Conversion setting controls how Salesforce CPQ represents non-subscription purchases as assets during the contracting process. With Asset Conversion set to *One per unit*, a contracted quantity of two for Product A produces two individual Asset records, each representing one purchased unit. This is useful when each unit must be independently tracked, amended, renewed, or replaced.

When Salesforce CPQ generates the renewal opportunity from the contract, it uses the contract's renewable asset records to create the renewal opportunity's products. Because the original purchase was converted into two separate assets, the renewal opportunity contains multiple Opportunity Product records related to Product A—one for each asset. This preserves the independent lifecycle of the purchased units at renewal time, allowing each unit to be addressed separately in the renewal transaction.

This behavior is part of CPQ's asset-based lifecycle management for non-subscription products. See Salesforce's documentation on Asset Conversion and the CPQ Trailhead material on advanced renewals.

QUESTION NO: 12

Universal Containers has a bundle with many Features. In one of these Features, Feature A, all Product Options share the same Discount Schedule.

How should the Admin set up a Discount Schedule so the quantities of all Product Options in Feature A are aggregated when determining the Discount Tier?

A. Set the Discount Schedule on Product Feature A and mark the Cross Orders checkbox as True on the Discount schedule.

B. Set the Discount Schedule on Product Feature A and mark the Cross Products checkbox as True on the Discount schedule.

C. Set the Discount Schedule on the Product Options records and mark the Cross Products checkbox as False on the Discount Schedule.

D. Set the Discount Schedule on the Product Options records and mark the Cross Orders checkbox as True on the Discount Schedule.

ANSWER: B

Explanation:

Set the Discount Schedule on Product Feature A and mark the Cross Products checkbox as True on the Discount schedule. In Salesforce CPQ, a discount schedule contains tiers that determine the discount based on quantity. Enabling **Cross Products** instructs CPQ to aggregate quantities for distinct products that use the same schedule, rather than evaluating each product option's quantity independently. Therefore, when the options in Feature A are configured, CPQ totals their quantities to identify the applicable discount tier and applies the schedule's tiered discount behavior accordingly.

Assigning the shared schedule at the Product Feature level is appropriate for this bundle design because the options in that feature use the same discounting rules. It centralizes the feature's configuration and allows the options to inherit the feature-level schedule. This setup is specifically designed for a shared quantity break across multiple product options in a bundle. Salesforce documents the Cross Products setting as the mechanism for combining quantities of products associated with a discount schedule. See Salesforce CPQ Discount Schedules documentation and Salesforce Trailhead: CPQ Discounts and Contracts.

QUESTION NO: 13

At Universal Containers, the Fulfillment team requires that Order Item dates reflect when orders are created, rather than Quote Line start dates, because there can be gaps between anticipated versus actual start dates.

At the same time, the Account Management team wants to ensure that all items from one order appear on one contract.

What are two ways the CPQ Specialist can meet these requirements? (Choose two.)

A. Set Quote Contracting Method to By Subscription End Date.

B. Set Order Product Date to Today when the record is created using Process Builder.

C. Set package Default Order Start Date to Today.

D. Set Contracting Method on the Order to Single Contract.

ANSWER: C D

Explanation:

Set package Default Order Start Date to Today. This Salesforce CPQ package setting controls the source used for the start date when CPQ creates order products from quote lines. Selecting Today makes the generated Order Item start date correspond to the actual date that the order is created, rather than retaining an anticipated start date from the quote line. This supports fulfillment processes where the quoted start date can differ from the real operational start date.

Set Contracting Method on the Order to Single Contract. During CPQ contracting, the contracting method determines how order products are grouped into contracts. Using Single Contract instructs CPQ to create or use one contract for all applicable products on that order, giving Account Management a unified contract record for the complete order. Together, these settings address the date requirement at order generation and the contract-grouping requirement during contracting, using standard CPQ configuration rather than custom automation. Salesforce documents the quote-to-order date settings in Quote to Order Fields and explains order contracting behavior in Contracting.

QUESTION NO: 14

Universal Containers uses Salesforce CPQ Advanced Approvals. A Quote requires different approval routing depending on its Net Total and overall Discount (%).

Which two Advanced Approvals configurations should the admin use to evaluate these values for approval routing?

Choose 2 answers.

A. Create Approval Variables for the values used in approval evaluation.

B. Create Approval Conditions that evaluate the applicable approval thresholds.

C. Create Product Features for each approval threshold.

D. Add the approval fields to the Quote Line Editor Field Set.

ANSWER: A B

Explanation:

Approval Variables allow Advanced Approvals to calculate or reference values that are needed by the approval process. The admin can use Approval Variables to make quote-level values, such as Net Total and Discount (%), available for approval evaluation.

Approval Conditions determine when an Approval Rule or Approval Step applies. The admin can configure conditions that compare the relevant approval variables or quote values to the required thresholds, such as a Net Total greater than a specified amount or a Discount (%) above an allowed level.

Together, Approval Variables provide the values used in the process and Approval Conditions determine the routing behavior based on those values.

See Salesforce Trailhead: Advanced Approvals in Salesforce CPQ.

QUESTION NO: 15

The Require Approved Quote package-level setting prevents CPQ from generating records for which object?

A. Order

B. Quote Document

C. Contracted Price

D. Contract

ANSWER: A

Explanation:

Order is correct because the Require Approved Quote package-level setting places an approval gate on the Salesforce CPQ quote-to-order process. When the setting is enabled, a quote must have an approved status before CPQ can create its associated order record. This ensures that the commercial details which flow into fulfillment—such as products, quantities, pricing, discounts, and applicable terms—have completed the organization's configured quote approval process before an order is committed.

The control is particularly useful when sales representatives can create orders directly from quotes. It helps enforce governance consistently without requiring users to remember an additional manual validation step. Approval status is evaluated at the point CPQ attempts to generate the order, so an unapproved quote cannot be used to advance the transaction through that CPQ ordering action. Administrators enable this behavior in the installed package settings and should align the quote approval process and quote statuses with their organization's order-creation workflow.

Salesforce documents the quote-to-order process and its approval requirements in Salesforce CPQ Quote-to-Order documentation. Additional CPQ learning resources are available through Salesforce Trailhead.

QUESTION NO: 16

"UC sells a bundle with multiple options. An Admin wants to allow the user the ability to choose options and define quantity during bundle configuration.

Which three values for Configuration Type will meet this requirement?

A. None

B. Configurable

C. Allowed

D. Disabled

E. Required

ANSWER: A C E

Explanation:

None, **Allowed**, and **Required** support interactive bundle configuration in the relevant ways. **Allowed** is used for an optional product option that a sales rep can select while configuring the bundle. **Required** ensures that an option is included in the configuration, while still allowing the option's quantity to be set when the option is configured as quantity-editable. This is useful when a component must be present but the required amount varies by customer. **None** does not impose a restrictive configuration behavior on the option, allowing it to participate normally in the bundle's configuration experience. In each case, quantity changes also depend on the Product Option's quantity-editability settings and any applicable product rules; Configuration Type alone does not override those controls. Salesforce CPQ uses product option configuration settings together with option selection and quantity controls to determine what a user can select and edit in the configurator. See Salesforce's Product Options documentation and the Salesforce CPQ Basics module.

QUESTION NO: 17

Universal Contamars wants to g«va a 23S discount on a specific Product Option purchased in the big Box bundla.

In which two ways could tha admin configura CPQ to automatically apply this discount9

Choosa 2 answars

A. Set the Option Discount (%) field on the Product Feature for the bundle.

B. Set the Option Discount (%) field on the Product Option for the bundle.

C. Set Discounted by Package to TRUE on the Product Option for the bundle.

D. Create a Price Rule that applies the 25% discount when the product is added as part of the bundle.

ANSWER: B D

Explanation:

Setting the Option Discount (%) field on the Product Option for the bundle is a direct declarative way to assign a fixed discount to that individual option. When the option is selected as part of the bundle, Salesforce CPQ applies the configured percentage to that option's quote line. This supports the requirement because the discount is defined on the specific Product Option rather than being applied broadly to every option in a feature or to the package as a whole.

Creating a Price Rule that applies the 25% discount when the product is added as part of the bundle is also appropriate. A price rule can evaluate quote and configuration conditions, then use a price action to populate the applicable discount field for the targeted option line. This approach is especially useful when the discount must be conditional, such as applying only in a particular bundle, for a particular customer segment, or when other configuration criteria are met. Salesforce CPQ price rules are designed to automate pricing adjustments through conditions and actions, while bundle configuration supports option-specific setup. See Salesforce Trailhead: Price Rules in Salesforce CPQ and Salesforce Trailhead: Product Configuration in Salesforce CPQ.

QUESTION NO: 18

An Admin at Universal Containers has observed that the value in the Quantity field on an Opportunity Product is different from the value in the Quantity field on its associated Quote Line. Which two scenarios describe when Quote Line Quantity and Opportunity Product Quantity will be different? (Choose two.)

A. The Quote Line's Product has Pricing Method set to Block.

B. The Quote Line's Product has Asset Conversion set to One Per Unit.

C. There is a Price Rule that changes the Quote Line's Quantity on the After Calculate event.

D. The Quote Line is on an amendment Quote and has a different Quantity from its original Quote Line.

ANSWER: A D

Explanation:

The Quote Line's Product has Pricing Method set to Block is correct because block pricing uses quantity blocks for CPQ pricing and display purposes. A quote line can represent the number of configured blocks, whereas the corresponding Opportunity Product quantity represents the underlying product-unit quantity used by the standard opportunity product record. This intentional difference allows CPQ to calculate a price from block tiers while preserving the opportunity's product quantity in the appropriate unit of measure.

The Quote Line is on an amendment Quote and has a different Quantity from its original Quote Line is also correct. Amendment quotes distinguish the customer's resulting subscription quantity from the quantity change relative to the existing contract. CPQ uses the amendment's effective or delta quantity when creating the opportunity product impact, while the quote line can retain the total amended quantity. For example, increasing an existing subscription from five units to eight units produces a three-unit commercial change even though the amended quote line reflects eight units as the resulting

entitlement. This behavior is necessary for CPQ to price and contract only the incremental amendment correctly. See Salesforce documentation on block pricing and amendments.

QUESTION NO: 19

Universal Containers (UC) sells a Product in four geographical regions that comes in 10 colors and four sizes. Instead of having a separate SKU for all combinations, UC needs the sales reps to specify location, color, and size during configuration.

What CPQ functionality can UC's Admin leverage to meet this requirement?

A. Option Constraints

B. Product Options

C. Product Features

D. Configuration Attributes

ANSWER: D

Explanation:

Configuration Attributes allow the administrator to collect configurable characteristics for a product without creating a separate product record and SKU for every possible combination. In this scenario, location, color, and size are descriptive selections that sales representatives must provide while configuring the item. The administrator can create the needed fields, such as picklists for the available regions, colors, and sizes, and expose them as configuration attributes in the configurator. This gives representatives a guided way to capture the selections as part of the product configuration experience.

The values selected through configuration attributes are retained on the relevant quote line and can be used by downstream CPQ processes. For example, they can support pricing logic, product rules, quote-document output, approvals, or order information, while the organization continues to manage one core product rather than maintaining a large catalog of nearly identical products. This approach avoids the administrative burden and reporting complexity caused by creating a unique SKU for each regional, color, and size variation. Salesforce describes configuration attributes as fields that capture additional information during bundle configuration and can drive configuration behavior. See Salesforce Help: Configuration Attributes and Salesforce Trailhead: CPQ Product Configuration.

QUESTION NO: 20

Universal Containers wants to show a Monthly Price column on the Quote Document if the Quote has Payment Terms of Net 30. In addition to creating the Monthly Price Line Column, which two configurations are needed to satisfy this requirement? (Choose two.)

A. Set the Conditional Print Field on the Line Column record.

B. Create a custom checkbox formula field indicating if the Payment Terms are Net 30.

C. Include Monthly Price in the Quote Line Editor Field Set.

D. Create an additional Line Items section without the Monthly Price field.

ANSWER: B D

Explanation:

Create a custom checkbox formula field indicating if the Payment Terms are Net 30 because conditional printing needs a field whose value can be evaluated when Salesforce CPQ generates the quote document. The formula can return true when the quote's Payment Terms value is Net 30, providing a simple, reusable condition for the template. Configure the Line Items section that contains the Monthly Price column to print when this formula is true.

Create an additional Line Items section without the Monthly Price field so the document can render an alternate line-item layout when the Net 30 condition is not met. CPQ quote templates support multiple sections, including Line Items sections, and conditional printing determines which section is included in the generated output. Together, the two layouts ensure that the Monthly Price column appears for Net 30 quotes while a complete line-item table still prints for other payment terms. This design keeps document presentation logic in the quote template and bases the decision on a quote-level field, which is appropriate because Payment Terms is a quote attribute. See Salesforce's Quote Templates documentation and Conditional Printing documentation.

QUESTION NO: 21

When Product A is Added to a Primary Quote, sales reps can view the Quote Une and make adjustments. However, an Opportunity Une Item is missing for Product A after the Primary Quote has been saved.

What are two possible causes for this behavior?

Choose 2 answers

A. Product A has 'Hidden'' set to TRUE.

B. Product A has "Component" set to TRUE.

C. Product A has "Optional" set to TRUE.

D. Product A has "Exclude From Opportunity" set to TRUE.

ANSWER: B D

Explanation:

Product A has "Component" set to TRUE and Product A has "Exclude From Opportunity" set to TRUE are both valid causes. Salesforce CPQ uses the primary quote to synchronize quote lines with opportunity products, but it does not necessarily create an Opportunity Line Item for every quote line. A product option marked as a component is treated as part of a bundle structure. Component lines can remain available on the quote for sales representatives to review and adjust while the opportunity reflects the commercial bundle at the parent level rather than each individual component. This supports representing the package sold without creating separate opportunity products for its internal parts. The Exclude From Opportunity setting is an explicit control that prevents the associated quote line from syncing to the opportunity. It is useful when a line is needed for quote configuration, pricing, or internal visibility but should not be included in the opportunity's product list, amount, or downstream opportunity processes. These settings affect opportunity synchronization independently of whether users can see and edit the quote line on the primary quote. See Salesforce's documentation on quote-to-opportunity synchronization and CPQ bundle products.

QUESTION NO: 22

Universal Containters (UC) has a requirement to identify any quotes where a sales user has applied a discount to any options within a bundle.

The admin created a price rule c their IsDiscounted__c custom quote field to IRUE.

Conditions Met = All.

Which two approaches must the admin create to ensure the price rule meets business requirements? Choose 2 answers

A. A Price Condition Tested Formula of SBQQ. RequiredBy 1.SBQQ. Bundled = TRUE

B. A Price Condition where the Tested Variable must cqual 0. The Summary Variable should have these values: Aggregate Function — Max Target Object — Quote Line Aggregate Field — SBQQ__Discount__c

C. A Price Condition with: Object = Quote Line Ficld = SBQQ__Discount__c Operator = Greater Than Filter Type = Value Filter Value = 0

D. A Price Condition with: Object — Quote Line Field — SBQQ__ProductOption__¢c Operator — Not Equals Filter Type — Value Filter Value — (Null)

ANSWER: C D

Explanation:

To set the quote-level `IsDiscounted__c` field only when a discounted bundle option exists, the rule needs conditions that identify both parts of the requirement on the applicable quote line: the line must have a discount and it must represent a bundle option. A Quote Line condition using `SBQQ__Discount__c` greater than zero detects that the sales user has applied a discount. A second Quote Line condition using `SBQQ__ProductOption__c` not equal to null limits the result to lines created from product options, rather than standalone products or parent bundle lines. Because the price rule uses "Conditions Met = All," both conditions must be true before its price action sets the custom quote checkbox to true. This directly implements the requirement at the quote level while evaluating the qualifying bundle-option line data. Salesforce CPQ price rules can evaluate quote-line fields through price conditions and then update a field on the quote using a price action. See Salesforce's CPQ Price Rules documentation and CPQ Price Conditions documentation.

QUESTION NO: 23

A user is quoting four subscription Products: Product A, Product B, Product C, and Product D.

Product A and B are in Quote Line Group 1, while Product C and D are in Quote Line Group 2.

The Quote's Start Date is June 4, 2020. The Quote's End Date is June 2. 2021.

The user wants Product A and B's Subscriptions to end on June 3, 2021, and Product C and D's Subscriptions to end on December 3, 2021.

Which two methods could the user apply individually to meet the requirement? (Choose two.)

A. Change the End Date on Quote Line Group 2 to December 3, 2021.

B. Change the Subscription Term on Quote Line Group 2 to the value 18.

C. Change the Subscription Term on the Quote Lines for C and D to the value 18.

D. Change the End Date on the Quote Lines for C and D to December 3, 2021.

ANSWER: A B

Explanation:

Changing the End Date on Quote Line Group 2 to December 3, 2021 is valid because Salesforce CPQ lets a quote line group establish subscription dates for the subscription lines assigned to that group. With the group beginning on June 4, 2020, an end date of December 3, 2021 gives Products C and D the requested longer subscription period, while the first group can retain its own schedule ending June 3, 2021.

Changing the Subscription Term on Quote Line Group 2 to the value 18 is also valid. CPQ uses subscription terms and dates to determine the subscription period and prorated pricing. Starting on June 4, 2020, an 18-month term runs through December 3, 2021. Applying the term at the quote line group level ensures that the common schedule applies consistently to both Products C and D. Quote line groups are specifically intended to support distinct sections of a quote, including separate subscription terms and date behavior where needed. Salesforce documents quote line group behavior and subscription date/term calculations in its CPQ guidance: Quote Line Groups and Subscription Pricing.

QUESTION NO: 24

An admin has created a bundle with four Product Options for Products A, B, C, and D.

When configuring the bundle, the user should not be allowed to select both Product C and Product D at the time.

How should the admin set up Bundle A to accomplish this?

A. Create an Option Constraint and set Type = Dependency

B. Create a Product Feature and set both Min Options and Max Options to 4.

C. Create an Option Constraint and set Type = Exclusion.

D. Create a Product Feature and set both Min Options and Max Options to 1.

ANSWER: C

Explanation:

Create an Option Constraint and set Type = Exclusion. Salesforce CPQ Option Constraints control relationships between product options in the same bundle. An exclusion constraint is designed for mutually incompatible selections: it prevents the constrained option from being selected when its restricting option is selected. For this bundle, the administrator configures the constraint between Product C and Product D so that CPQ enforces the intended “not both” relationship directly in the Bundle Configuration page.

This approach expresses the business requirement at the option-relationship level, rather than relying on a general count limit for a feature. It also keeps the bundle easy to maintain: if the administrator later changes the available options or introduces additional incompatibilities, those relationships can be managed as explicit constraints. CPQ evaluates the constraint during configuration and guides the sales user away from an invalid combination before the quote is finalized. Salesforce documents Option Constraints as the standard bundle configuration mechanism for dependency and exclusion relationships. See Salesforce Help: Option Constraints and Trailhead: Salesforce CPQ Product Rules.

QUESTION NO: 25

When creating Orders from Quotes with Salesforce CPQ, the Admin wants to separate similar Products into Orders based on the Product Family of the Products being ordered.

Which two steps must the Admin perform to automatically split these types of Orders? Choose 2 answers

A. Set the Order By field on the Quote Line to Product Family.

B. Enable Allow Multiple Orders from a checkbox in the CPQ Package Settings.

C. Set the Order By field on the Quote to Product Family.

D. Enable Allow Multiple Orders from a checkbox on the Quote.

ANSWER: C D

Explanation:

To automatically generate separate orders from one Salesforce CPQ quote according to product family, enable *Allow Multiple Orders* on the quote and set the quote’s *Order By* field to *Product Family*. The quote-level Allow Multiple Orders setting authorizes CPQ’s ordering process to create more than one order from that quote. This is essential because CPQ otherwise creates a single order when the quote is ordered.

The quote-level Order By value supplies the grouping criterion used during order generation. When it is set to Product Family, CPQ evaluates the product family represented by each quote line and groups lines with the same family into the same generated order. Lines assigned to different product families are placed in their corresponding separate orders. This configuration lets an administrator control fulfillment or downstream processing by product grouping without manually dividing the quote into separate transactions.

These settings belong on the quote because the order-generation behavior and its grouping rule apply to the quote as a whole. Salesforce documents the quote-to-order process and the multiple-order configuration in its CPQ guidance: Salesforce CPQ Quote-to-Order documentation. Additional CPQ implementation guidance is available through Salesforce Trailhead CPQ learning modules.

QUESTION NO: 26

Universal Containers (UC) sells Product A for an initial, fixed price without the ne«d for renewal behavior. UC must be able to track an individual senal number on the Asset record for each Product A sold.

Which Product field value should the admin set up to handle this use case?

A. Asset Conversion: One Per Line

B. Subscription Type: One-Time

C. Asset Conversion: One Per Unit

D. Subscription Price: List Price

ANSWER: C

Explanation:

Asset Conversion: One Per Unit is the appropriate product setting because UC needs a distinct Asset record for every individual unit sold. In Salesforce CPQ, the Asset Conversion field controls the number of asset records created when an order product is contracted. Selecting One Per Unit converts each unit represented by the order or quote line into its own asset. For example, if a customer purchases several units of Product A on one line, CPQ creates separate asset records rather than combining the quantity into one record.

This asset granularity is essential for serial-number tracking. A serial number identifies one specific physical product, so each product instance must have its own Asset record where that identifier can be stored and managed. The product's fixed, nonrenewable selling model does not alter this requirement; the deciding factor is the need to identify and track every individual delivered unit after sale. This setup also supports later service, replacement, and customer-asset management processes because each physical item is represented independently.

Salesforce CPQ documentation describes product configuration fields and their effect on downstream quote, order, contract, and asset behavior. See Salesforce CPQ product fields and the Salesforce CPQ asset-based ordering Trailhead module.

QUESTION NO: 27

Universal containers has an add-on product that can only sold as part of bundles.

Which two steps should the admin take to meet this requirement?

Choose 2 answers

A. Set the component checkbox to TRUE on the add-on product record.

B. Create a product Option records referencing the add-on product on each bundle.

C. Set the customer community availably picklist on the add-on Product to never.

D. Create a product Feature record referencing the add-on product.

ANSWER: A B

Explanation:

To make an add-on product available only within bundles, the administrator should set the Component checkbox to TRUE on the add-on product record and create Product Option records referencing that add-on product on each bundle. The Component setting identifies the product as a bundle component rather than a standalone item intended for direct selection in the quote line editor. This supports the requirement that sales users obtain the product through bundle configuration.

A Product Option record is then needed for every bundle that should offer the add-on. Product Options establish the relationship between a bundle parent product and its selectable child product, and they can also carry bundle-specific configuration details such as quantity, required status, selection behavior, and feature assignment. Creating the option relationship for each applicable bundle ensures that the same component product is presented only in the appropriate bundle contexts.

This combination separates the product's standalone availability from its bundle placement: the product is designated as a component, while Product Option records define exactly which bundles contain it. Salesforce CPQ bundle configuration is based on parent products and their Product Option child records. See Salesforce Trailhead: Configure Products in Salesforce CPQ and Salesforce CPQ Product Option API reference.

QUESTION NO: 28

The sales operations team at Universal Containers used the Create Order button to generate an Order with only half of the available Quote Lines and then the team selects the Ordered checkbox.

What updates should the sales operations team expect?

A. An Order without Order Products is created.

B. A second Order is generated with the remaining Quote Lines.

C. An error is thrown informing the user an order already exists.

D. The existing Order is updated with the remaining Quote Lines.

ANSWER: B

Explanation:

A second Order is generated with the remaining Quote Lines. Salesforce CPQ supports partial ordering, which allows users to create an order for only selected quote lines rather than requiring every line on the quote to be ordered at once. The first use of the Create Order action creates an Order and corresponding Order Products only for the quote lines included in that initial order. The other quote lines remain available to be ordered.

When the team subsequently marks the remaining quote lines as ordered, CPQ treats those lines as a separate ordering event. It creates another Order for those previously unconverted lines, with Order Products representing the remaining products and quantities. This behavior is useful when a customer accepts or receives different portions of a quote at different times, such as for phased deployments, split shipments, or staggered fulfillment. Each generated Order preserves the relationship to the originating quote while keeping the ordered line sets distinct for downstream order management and fulfillment processes.

For Salesforce CPQ order-generation behavior and the relationship between quote lines and orders, see Salesforce Help: Orders in Salesforce CPQ and Salesforce Help: Create Orders from Quotes.

QUESTION NO: 29

When Product A is Added to a Primary Quote, sales reps can view the Quote Une and make adjustments. However, an Opportunity Une Item is missing for Product A after the Primary Quote has been saved.

What are two possible causes for this behavior?

Choose 2 answers

A. Product A has 'Hidden' set to TRUE.

B. Product A has "Component" set to TRUE.

C. Product A has "Optional" set to TRUE.

D. Product A has "Exclude From Opportunity" set to TRUE.

ANSWER: B D

Explanation:

Product A having "Component" set to TRUE is a valid cause because component products are treated as constituent items within a bundle. Salesforce CPQ can retain the component quote line for configuration, pricing, and visibility on the quote while not creating a corresponding standalone Opportunity Product record during quote-to-opportunity synchronization. This supports bundle structures in which the opportunity reflects the commercial bundle product rather than every underlying component.

Product A having "Exclude From Opportunity" set to TRUE is also a direct cause. This product-level setting explicitly prevents Salesforce CPQ from syncing quote lines for that product to Opportunity Products. The quote line can therefore remain available for the sales representative to review and adjust on the primary quote, but no Opportunity Line Item is created after the quote is saved or synchronized. Administrators commonly use this setting for products that are needed for quoting, internal tracking, or bundle configuration but should not be represented as independent opportunity products.

For additional context on CPQ product setup and bundle behavior, see Salesforce Trailhead's Products in Salesforce CPQ and Product Bundles in Salesforce CPQ.

QUESTION NO: 30

Universal Containers sells a monthly subscription service with tiered pricing:

Total Price

$1,000 for the first 100 units

$1,000 plus $9 per unit above 100

$4,600 plus $8 per unit above 500

$8,600 plus $7 per unit above 1,000

Which pricing method should the admin select for this service?

A. Block

B. Tiered

C. Segmented

D. List

ANSWER: A

Explanation:

Block is the appropriate Salesforce CPQ pricing method because the service has an initial fixed charge for a defined quantity and then uses overage rates that change at specified quantity thresholds. Block pricing lets an administrator define quantity blocks with a block price, such as $1,000 for the initial 100 units, and an overage rate for quantity beyond the block. The subsequent blocks can establish the accumulated starting price and the applicable per-unit overage rate: $4,600 at 500 units with an $8 overage rate, then $8,600 at 1,000 units with a $7 overage rate. This produces the stated total-price structure while ensuring that the price is calculated from the applicable threshold and excess quantity. It is particularly useful for subscriptions, usage-based services, and capacity products where a customer receives an included quantity and pays a different marginal rate as usage grows. The product's Pricing Method should therefore be set to Block, and the administrator should configure the associated block-pricing records with the relevant lower bounds, upper bounds, block prices, and overage rates. See Salesforce's Block Pricing documentation and the Salesforce CPQ pricing methods Trailhead module.

QUESTION NO: 31

Subscription Pricing	Percent Of Total
Percent Of Total Base	Net
Percent Of Total (%)	10%

What is the calculated List Unit Price the user should see for Cloud Storage Support?

A. $50

B. $225

C. $273

D. $23

ANSWER: B

Explanation:

The calculated List Unit Price for Cloud Storage Support is **$225**. In Salesforce CPQ, the quote line's List Unit Price is not necessarily the product's original price book list price. During calculation, CPQ can update that field through configured pricing logic, including price rules and price actions. A price action can write a computed result directly to the quote line's List Unit Price field, allowing the configured calculation shown in the setup to establish the product's effective list price before subsequent discounting is considered.

Accordingly, the value displayed to the user is the result produced by the applicable calculation: $225. This is important because CPQ's price waterfall distinguishes list pricing from later price stages, such as regular price, customer price, partner price, and net price. Using List Unit Price as the target preserves that sequence and makes the calculated value available for downstream pricing and discount calculations. Salesforce documents that price rules evaluate conditions and use price actions to update target fields during quote calculation; the calculation can therefore alter quote-line pricing values from their initial price book values. See Salesforce's Price Rules documentation and its CPQ pricing methods documentation.

QUESTION NO: 32

Universal Containers (UC) maintains a large Product catalog with more than 500 Products. Ten Products from various Product Famines are frequently requested and purchased by UC's customers and must be easy to find for users.

Mow should the admin meet the requirement?

A. Set the Sort Order for each of the ten Product records to a numeric value that is greater than any other Product.

B. Create a Custom Action with Search Filters that targets the Product Selection page to show only the ten Products.

C. Create a Custom Action that targets the Product Configuration page for a bundle that contains the ten Products.

D. Create a Global Action to clone a pre-made Quote containing the ten Products, and then refresh prices.

ANSWER: B

Explanation:

Create a Custom Action with Search Filters that targets the Product Selection page to show only the ten Products. A Salesforce CPQ custom action can open the Product Selection page with predefined search criteria, giving sales users a focused entry point for commonly sold products rather than requiring them to search through the entire catalog. The administrator can place the action in the Quote Line Editor so that it is available while users are building a quote, give it a clear label such as "Add Frequently Purchased Products," and configure its search filters to return the intended set of products. This approach is particularly useful when the products span multiple product families because the action can apply product-selection filtering independently of the standard product-family navigation. Users can still use the normal Add Products process when they need the full catalog, while the custom action creates a fast, repeatable workflow for the high-volume items. Salesforce CPQ custom actions are specifically intended to streamline quote-creation tasks by directing users to supported targets, including Product Selection, and can apply search filters for that target. See Salesforce's Custom Actions documentation and the Salesforce CPQ quote configuration Trailhead module.

QUESTION NO: 33

An admin has set the Group Field on one of the Quote Templates. On output documents on Quote A, Quote Lines appear to be grouped incorrectly.

What are two explanations for this grouping? (Choose two.)

A. Bundles on Quote A contain a Configuration Attribute designating location.

B. There are Quote Line Groups related to Quote A.

C. Template Section with Template Content of Line Items type has a value in Group Field.

D. Modified By field on the user's Quote was last modified before the new Quote Template was implemented.

ANSWER: B C

Explanation:

There are Quote Line Groups related to Quote A because CPQ recognizes quote line groups when generating quote documents. These groups can control how lines are organized in the output, so their presence can produce visible grouping that differs from the administrator's expected layout based solely on the template configuration. Quote line groups are especially relevant when the quote has been organized into logical sections, such as product categories, project phases, or locations.

Template Section with Template Content of Line Items type has a value in Group Field because the Line Items template content record can independently specify the field used to group the rendered quote lines. The document generator evaluates that configured field and creates groupings from its values. For example, grouping by a product-related field can separate line items wherever that field's value changes. Reviewing both the quote's related line groups and the Group Field configured on the Line Items template content identifies the sources that govern the document's displayed line-item grouping. Salesforce documents quote-template line-item grouping behavior in Group Items in Quote Templates and related template configuration concepts in Quote Templates.

QUESTION NO: 34

A sales rep at Universal Containers is adjusting pricing for asubscription Product on a new business Quote. The Subscription Term Is 24 months. The Product's Default Subscription Term Is

12 months, The Quantity is 10, The List Unit Price is $120.

If a 10% Volume Discount, 20% Additional Discount, and 5% Partner Discount are applied, what are the values at each step In the standard price waterfall?

A. Regular Unit Price: $108.00Customer Unit Price: $168.00Net Unit Price: $156.00

B. Regular Unit Price: $108.00Customer Unit Price: $86.40Net Unit Price: $82.08

C. Regular Unit Price: $216.00Customer Unit Price: $172.80Net Unit Price: $164.16

D. Regular Unit Price: $240.00 Customer Unit Price: $216.00 Net Unit Price: $164.16

ANSWER: D

Explanation:

Regular Unit Price: $240.00; Customer Unit Price: $216.00; Net Unit Price: $164.16 is correct. For a subscription product, Salesforce CPQ uses the subscription term and the product's default subscription term to derive a proration multiplier. Here, the multiplier is 24 divided by 12, or 2. The $120.00 list unit price is therefore prorated to a Regular Unit Price of $240.00. Quantity does not change these unit-price fields; it affects extended amounts instead.

The 10% volume discount is applied to the regular unit price, producing a Customer Unit Price of $216.00 ($240.00 × 0.90). The 5% partner discount is then applied in the partner-price stage, resulting in $205.20. Finally, the 20% additional discount is applied to that amount to produce the Net Unit Price: $164.16 ($205.20 × 0.80). This follows CPQ's standard waterfall sequencing, in which subscription proration establishes the regular price before discount schedule, partner, and additional

discount calculations determine the final net price. See Salesforce Trailhead's CPQ pricing methods and subscription term proration documentation.

QUESTION NO: 35

Universal Containers allows clients to negotiate a discount for Product A until a specified date upon Contract activation.

Which three fields on the Contracted Price record should be configured to satisfy this requirement? (Choose three.)

A. Effective Date

B. Expiration Date

C. Product

D. Contract

E. Discount

ANSWER: B C E

Explanation:

Expiration Date, **Product**, and **Discount**

configure the essential terms of this negotiated contracted-price arrangement. Product identifies the exact item receiving the negotiated treatment, ensuring that the special commercial term is scoped to Product A. Discount stores the negotiated percentage reduction that Salesforce CPQ applies when the product is added to an eligible quote. Expiration Date defines the final date through which that negotiated discount can be used, fulfilling the requirement that the concession is only available until a specified date.

Together, these fields define the product-specific pricing entitlement and its validity period. Contracted pricing is designed to preserve customer-specific commercial terms so they can be honored on later transactions, while date-based validity prevents a temporary concession from continuing indefinitely. In the context of an activated contract, the contracted-price record is used as the source for the negotiated product discount; its expiration setting controls when that price term ceases to be available. See Salesforce's Contracted Pricing documentation and the Salesforce CPQ Contracts and Renewals Trailhead module for further details.

QUESTION NO: 36

A Quote Template has Template Sections related to these types of Template Content:

- Template Top
- Line Items
- HTML
- Quote Terms

The Admin has associated these Template Content records to four Template Sections. Which three statements are valid about these types of Template Content? (Choose three.)

A. Template Top and HTML are fully code-customizable.

B. Line Items are either displayed as Standard or with Price Dimensions.

C. Template Top is the only section that can show Billing/Shipping info.

D. Quote Terms can be dynamic if Term Conditions are defined.

E. Line Items can be coded into an HTML section.

ANSWER: B C D

Explanation:

Line Items are either displayed as Standard or with Price Dimensions. Salesforce CPQ provides these display approaches for line-item template content. Standard line-item output presents the usual quote-line table, while Price Dimensions supports display of pricing information that is dimensioned across a subscription or consumption schedule. The Line Items content type is therefore the appropriate structured content for a product and pricing table in a generated quote document.

Template Top is the only section that can show Billing/Shipping info. Template Top is the specialized quote-template content type for the document's header-area quote and account details, including the standard billing and shipping address information. This lets the generated document consistently place those customer details at the beginning of the quote.

Quote Terms can be dynamic if Term Conditions are defined. Salesforce CPQ evaluates term conditions to determine which quote terms should appear for a particular quote. Administrators can therefore maintain terms centrally and conditionally include the applicable language based on quote data, rather than creating a separate quote template for every terms scenario.

See Salesforce's CPQ quote templates documentation and the Salesforce CPQ advanced quote templates Trailhead unit.

QUESTION NO: 37

An Admin wants to add a second level of categorization: groupings of Product Features in the Configurator to be displayed as tabs.

Which step should the Admin take to meet this requirement?

A. Set and choose a Category on the Feature.

B. Set Option Layout to Tabs on the Feature.

C. Set Option Layout to Tabs on the Product.

D. Set and choose a Group on the Feature.

ANSWER: C

Explanation:

Set Option Layout to Tabs on the Product. In Salesforce CPQ, Product Features organize a bundle's options into logical sections in the configurator. The Option Layout field is configured on the parent Product record—the bundle—not on individual Product Feature records. Selecting Tabs instructs the configurator to render each Product Feature as a separate tab, creating the requested additional level of categorization while users configure the bundle. The administrator can then use the Product Feature fields, such as Feature Name and Number, to give each tab a clear label and control its display order. This design keeps the bundle's option-selection experience easier to navigate, especially when it contains numerous options spanning distinct functional areas. Salesforce documentation identifies Option Layout as a field on the product that determines how options and features are displayed during configuration, including the Tabs layout. Product Features remain the mechanism for assigning individual product options to the appropriate group within that tabbed interface. See Salesforce's Product Option Layout documentation and the Product Features documentation for the relevant bundle configuration behavior.

QUESTION NO: 38

Sales reps at Universal Containers want to be able to filter products based on their Release Date. For example, a sales rep would like to see products with a Release Date between their input values of 11/23/04 and 01/16/07 when adding products.

What should the admin create for this use case?

The options are:

A. Configuration attributes for the earliest and latest date

B. A custom action condition for the Release Date field

C. A custom action with the Filter Source Field set to Release Date

D. A search filter for the Release Date field

ANSWER: D

Explanation:

A search filter for the Release Date field is the appropriate configuration because Salesforce CPQ product search filters expose selected product fields as criteria on the product selection page. The administrator can configure the filter against the Product record's Release Date field, allowing sales reps to enter date-based criteria while searching for products to add to a quote. Since Release Date is a date field, the product selection experience can apply date comparison or range criteria so that the returned products are limited to those whose dates fall within the sales rep's requested period, such as November 23, 2004 through January 16, 2007.

This approach keeps the filtering activity in the product-selection workflow, where reps need it, and uses CPQ's native product-search configuration rather than requiring a bundle configuration process or custom automation. Search filters are intended to help users narrow a potentially large product catalog using relevant Product fields. Review the Salesforce CPQ product-selection learning material at Salesforce Trailhead: Product Selection and the Salesforce CPQ documentation available through Salesforce Help.

QUESTION NO: 39

Universal Containers has a bundle with two Product Features: a Standard Treatments feature with Option Selection Method set to Dynamic, and a Custom Treatment feature. The Standard Treatments feature filters for products that are tagged Standard. If a user selects any option from Custom Treatments, selecting options from Standard Treatments is prohibited.

Which two steps can the Admin take to resolve the issue? (Choose two.)

A. Create a selection Product Rule that hides all Standard Treatment options when Custom Treatment options are selected.

B. Create a filter Product Rule that excludes all products on the Standard Treatment feature when Custom Treatment options are selected.

C. Create a selection Product Rule that removes all Standard Treatment options when Custom Treatment options are selected.

D. Create an exclusion Option Constraint rule that disables Standard Treatment options when constrained by Custom Treatment options.

ANSWER: B C

Explanation:

"Create a filter Product Rule that excludes all products on the Standard Treatment feature when Custom Treatment options are selected" is appropriate because the Standard Treatments feature uses the Dynamic option selection method. Filter product rules are designed to control which products are available in dynamic bundle features. The rule can evaluate whether a Custom Treatment has been selected and then exclude products matching the Standard tag, preventing users from choosing a Standard Treatment after that condition is met.

"Create a selection Product Rule that removes all Standard Treatment options when Custom Treatment options are selected" complements the filtering behavior by handling Standard Treatment options that may already be selected when the user chooses a Custom Treatment. A selection rule's Remove action updates bundle selections automatically when its conditions are satisfied, so the quote configuration remains compliant as the user changes choices.

Together, the filter rule controls future availability in the dynamic feature, while the selection rule clears conflicting existing selections. Salesforce documents filter rules as the mechanism for filtering products in dynamic bundles and selection rules as the mechanism for automatically adding or removing bundle options. See Salesforce CPQ Product Rules and Trailhead: Product Rules in Salesforce CPQ.

QUESTION NO: 40

Upon renewal of a Contract, a user has reported that bundles are being created without preserving the structure This leads to validation errors and unwanted price changes. The admin has identified that Preserve Bundle Structure is set to FALSE on a system generated Contract record.

What should the admin do to prevent this Issue from happening In the future?

A. Set Preserve Bundle Structure to TRUE on existing Account Records, and update the Re-evaluate Bundle Logic on Renewals setting in the Installed Package Settings to TRUE.

B. Set Preserve Bundle Structure to TRUE on existing Contract and Account Records, and update the Preserve Bundle Structure setting in the Installed Package Settings to TRUE,

C. Set Preserve Bundle Structure to TRUE on existing Account Records, and change the default field value on the Contract object to TRUE.

D. Set Preserve Bundle Structure to TRUE on existing Contract Records, and set field level security for Preserve Bundle Structure on the Contract object to only be editable by System Admins.

ANSWER: B

Explanation:

Set Preserve Bundle Structure to TRUE on existing Contract and Account Records, and update the Preserve Bundle Structure setting in the Installed Package Settings to TRUE. Salesforce CPQ uses the Preserve Bundle Structure setting to retain the original parent-child relationships of bundle products when it creates renewal opportunities and renewal quotes. Retaining those relationships ensures that options remain associated with their bundle parent, so the renewal process starts with a configuration consistent with the contracted sale.

The package-level setting establishes the intended default behavior for subsequently generated records, which addresses future renewals. Updating Account records is also important because account-level renewal settings can be used when CPQ generates contracts and renewal data. Updating existing Contract records corrects contracts already in scope for a future renewal, preventing them from continuing to supply a false value when their renewal quote is generated. Together, these updates align the relevant existing data with the installed-package default, allowing CPQ to preserve bundle structure consistently for both current contractual records and newly generated contracts.

For Salesforce CPQ renewal behavior and the related configuration controls, see Salesforce CPQ Renewals documentation and Salesforce CPQ Package Settings documentation.

QUESTION NO: 41

Universal Containers has a multi-level bundle with a Percent of Total option at the first level. This Percent of Total option's calculation should be based only on other options at the same level.

How should the admin set this up?

A. Set the percent of Total Scope field on the Product Option record to a value of Components.

B. Set the percent of Total Category field on each Product in the bundle to the same value.

C. Set the percent of Total Scope field on the product Option record to a value of package.

D. Set the Percent of Total Scope field on the Product Option record to a value of Group.

ANSWER: A

Explanation:

Set the percent of Total Scope field on the Product Option record to a value of Components. In Salesforce CPQ, a Percent of Total product calculates its price by applying its configured percentage to a defined set of quote lines. The Percent of Total Scope field determines that set. For a multi-level bundle, the Components scope limits the calculation base to the other

component options at the Percent of Total option's own bundle level. This produces a sibling-level calculation, which is exactly what is needed when the first-level option must derive its price only from other first-level options rather than from nested child options or unrelated quote lines.

This configuration belongs on the Product Option record because the option's position and behavior within its parent bundle determine the applicable component set. The percentage itself is configured through the option's Percent of Total settings, while Components supplies the intended calculation boundary. Salesforce documents Percent of Total products and explains that scope controls the products included in the calculation. See Salesforce Help: Percent of Total Products and Trailhead: Salesforce CPQ Product Configuration.

QUESTION NO: 42

An admin has created a text field Configuration Attribute for Bundle

A.

The admin wants the attribute to start with a dynamic value the moment the configuration page loads. Which steps should the admin take to meet this requirement?

A. Create a Flow to update the Product Option field that is used for the Configuration Attribute value. Set the process to trigger upon new record creation.

B. Create a Price Rule to target the Product Option field that is used for Configuration Attribute to give it a value. Ensure the end user selects Apply Rules in the Configurator.

C. Create a formula text field on the Quote, constructing the formula to return the desired default value. Update the Configuration Attribute Default Field to identify the Quote formula field.

D. Create a text field on the Quote Line object with the same API name as the Configuration Attribute field. Create a Price Rule to target the Quote Line field to give it a value.

ANSWER: C

Explanation:

Create a formula text field on the Quote, constructing the formula to return the desired default value. Update the Configuration Attribute Default Field to identify the Quote formula field. A configuration attribute's Default Field can reference a field on the quote, allowing Salesforce CPQ to populate the attribute when the configurator initially opens. Because the referenced quote field is a formula, its value is calculated dynamically from the current quote and related data, rather than being a static value stored on the product option. This provides the desired value immediately at configuration-page load and lets the administrator maintain the defaulting logic declaratively in the quote formula. The formula must return a value compatible with the text configuration attribute, and the configuration attribute's target field remains the Product Option field where CPQ stores the selected or defaulted configuration value. This approach is particularly useful when the initial attribute value depends on quote context, such as account information, quote fields, or other formula-accessible data. Salesforce CPQ documents configuration attributes and their use in product configuration in the Salesforce Help configuration attributes documentation. Additional implementation guidance is available in the Salesforce CPQ Administrator Guide.

QUESTION NO: 43

Universal Containers sells a bundle Product which contains many Features and Options. Users report that the bundle is difficult to configure due to a significant amount of scrolling to find the desired Features and Options.

What are three ways the Admin can adjust the design of this bundle to reduce scrolling in configuration? Choose 3 answers

A. Set System to True on the Product Options to be excluded from the configurator.

B. Set Option Selection Method to Add on the Product Features.

C. Group the Product Features of the bundle into tabs using the category field.

D. Change Option layout to Tabs on the bundle Product.

E. Change Enable Large Configuration to True on the bundle Product.

ANSWER: A D E

Explanation:

Setting **System to True on the Product Options to be excluded from the configurator** reduces visual clutter by keeping system-managed options out of the user-facing selection experience. This is appropriate for options that are added or managed by configuration logic rather than choices a sales rep needs to review manually.

Changing **Option layout to Tabs on the bundle Product** organizes the configurator into feature-based tabs. Instead of presenting every feature and option in one long continuous page, users can select the relevant tab and work within that focused area. This is a direct layout setting for making a large bundle easier to navigate.

Changing **Enable Large Configuration to True on the bundle Product** uses Salesforce CPQ's large-configuration experience for bundles with substantial numbers of options. It is intended to improve usability and performance for large bundles by presenting the configuration in a more manageable, navigable form rather than requiring users to work through an extensive single-page option list. Together, hiding system options, using a tabbed layout, and enabling the large-configuration experience make the bundle materially easier to configure. See Salesforce's bundle product documentation and large configuration documentation.