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Salesforce CPQ-301

Configure and Administer a Salesforce CPQ Solution

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Question: 1

An Admin creates a Search Filter for Product Code that has a predefined Filter Value of Green and an operator of "starts with".

If the Search Filter is visible, how can sales reps interact with the filter on the Product Selection screen?

- A. Sales reps can replace the text, but are unable to leave the required field blank.
- B. Sales reps can change the operator from "starts with" to "contains".
- C. Sales reps can see the filter, but are unable to alter the filter text.
- D. Sales reps can delete the text to ignore the filter.

Answer: D

Explanation:

In Salesforce CPQ, when search filters are configured with predefined values and visible to sales reps, their interaction with the filter is determined by the filter's configuration and available operators. The behavior described here is tied to Search Filters in the Product Selection screen, which allow users to refine the list of displayed products based on specific criteria.

Search Filter Configuration:

Predefined Filter Value: Here, the filter is set with a value ("Green").

Operator: The operator "starts with" limits the search to product codes beginning with the text "Green."

Sales Rep Interaction with the Filter:

The visibility of the search filter enables sales reps to view and interact with the criteria during product selection.

Specifically, sales reps have the ability to delete the predefined text to ignore the filter and retrieve a broader or unrestricted product list.

Documentation Alignment: According to Salesforce CPQ guidelines (as referenced in the Salesforce CPQ package settings and user behaviors), if filters are not marked as "required," users can remove or modify the filter values dynamically. This is designed to offer flexibility during quoting while maintaining filter defaults for ease of use.

The interaction described above aligns with Salesforce CPQ's behavior regarding visible search filters, emphasizing that sales reps can clear the filter text unless restricted by additional customization.

Use Case Reference:

When a sales rep begins a quote and searches for products, the filter defaults to "Green."

If the rep does not want to limit the product search to codes starting with "Green," they can simply remove the text and refresh the results.

Relevant Salesforce CPQ Reference:

Search Filters in the Quote Line Editor section of CPQ documentation .

Guidelines for Search Filter Configuration and behaviors when visible filters are not required .

Question: 2

Users at Universal Containers have reported when amending a contract, the net pricing of some products is incorrect. The Admin has done a preliminary investigation and found that the issue only happens on existing products when their quantity is adjusted. What is the likely cause?

- A. The Revised Quantity has been set on the Subscription record.
- B. The Products have a Discount Schedule and Cross Order is not selected.
- C. A Price Rule is firing Before Calculate and changing the Regular Unit Price.
- D. A Price Rule is firing On Calculate and changing the Effective Quantity.

Answer: B

Explanation:

Background Context:When amending a contract in Salesforce CPQ, issues with net pricing arise if the amendment impacts existing subscription products. Subscription products often rely on Discount Schedules for calculating discounts, especially when quantity changes. The "Cross Order" field on Discount Schedules ensures discounts account for cumulative quantities across multiple orders or contracts.

Problem Analysis:

The reported issue involves incorrect net pricing specifically when the quantity of existing products is adjusted during contract amendments.

This aligns with the functionality of Discount Schedules, where the total quantity determines the discount applied. Without "Cross Order" enabled, Salesforce CPQ considers only the current order's quantities rather than aggregating across orders.

Root Cause Identification:

Discount Schedule and Cross Order:If the Discount Schedule associated with these products does not have "Cross Order" enabled, any amendments won't consider cumulative quantities. Instead, the system recalculates based on only the new or adjusted quantities, leading to incorrect net pricing.

Supporting Evidence:

Salesforce documentation highlights that Cross Order must be selected in the Discount Schedule for accurate discount calculations across multiple orders or contracts. Otherwise, amendments operate in isolation .

The feature ensures that ongoing contracts retain accurate pricing based on total historical quantities.

Recommended Resolution:

Navigate to the Discount Schedule associated with the affected products.

Verify and enable the Cross Order checkbox:

Go to Setup > Discount Schedules.

Locate the relevant Discount Schedule.

Edit the schedule and enable Cross Order.

Test the functionality by amending the contract and verifying the net pricing calculations.

Preventative Actions:

For all subscription-based products relying on Discount Schedules, ensure Cross Order is enabled during initial configuration.

Provide training to Salesforce CPQ admins to understand the implications of Discount Schedule settings on pricing.

By following these steps and verifying the Discount Schedule configuration, the issue can be resolved, ensuring consistent and accurate net pricing during contract amendments.

Question: 3

Subscription Product A has a Subscription Term of 6, a List Price of \$100, and a Ranged Discount Schedule. A user has added this Product a Quote with a Term of 12.

A u The Ranged Discount Schedule is automatically applying a Discount of 25%.

What is the Regular Pnce m this scenario?

- A. Regular Pnce of \$150
- B. Regular Price of \$75
- C. Regular Price of \$200
- D. Regular Price of \$100

Answer: B

Explanation:

Subscription Term and List Price:

Subscription Product A has a Subscription Term of 6 months with a List Price of \$100.

When added to a Quote with a Term of 12 months, the List Price is prorated to account for the longer term.

Proration and Ranged Discount Schedule:

A Ranged Discount Schedule applies discounts based on quantity, volume, or term thresholds.

For the 12-month term, the price is prorated to \$200 (2 times the List Price for 6 months).

The Discount Schedule applies a 25% discount to the prorated price, reducing it to \$150.

Regular Price Calculation:

The Regular Price reflects the discounted value after applying the Discount

Schedule: $\text{Regular Price} = 200 \times (1 - 0.25) = 150 \times 0.5 = 75$ $\text{Regular Price} = 200 \times (1 - 0.25) = 150 \times 0.5 = 75$

Key Salesforce CPQ Reference Points:

Ranged Discount Schedules modify the List Price based on configured thresholds .

Subscription Pricing Logic ensures correct proration for products with terms different from the Quote Term .

Question: 4

In what way does Smart Approvals expedite the approval process?

- A. Approving a quote will auto-approve any lesser-discount quotes related to the same opportunity.
- B. Quotes within defined thresholds will be automatically approved.
- C. Quotes with multiple steps in the approval chain go directly to the highest approver required.
- D. Rejected quotes that are resubmitted within previously approved values go directly to the person who rejected.

Answer: D

Explanation:

Smart Approvals Overview:

Salesforce CPQ's Smart Approvals streamline the approval process by re-evaluating previously approved records to avoid redundant approvals.

Rejected Quotes Resubmission:

If a quote is rejected, and the user resubmits it without exceeding previously approved values, it bypasses the full approval chain and is sent directly to the person who rejected it.

This functionality minimizes unnecessary delays and ensures efficient quote handling.

Documentation Alignment:

Smart Approvals Configuration and behavior as outlined in CPQ guidelines ensure approval efficiency .

Question: 5

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:

Potential Causes:

Component Checkbox: Products marked as Components are typically excluded from being directly selectable in the Product Selection screen unless part of a bundle .

Search Filter: Custom Search Filters on the Add Products button limit the display of products based on criteria such as product attributes or field values.

Excluded Reasons:

Hidden Checkbox: This is generally used to hide products from the Quote Line Editor, not the Product Selection screen.

Custom Action Condition: While these can limit the Add Products button's visibility, they do not directly affect individual product visibility.

Salesforce CPQ Reference Points:

Documentation on Product Selection Behavior and Search Filters confirms these behaviors .



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