CPQ Knowledge from SFCPQ Victor

A collection of random tips, knowledge, and information procured by Victor - a senior Tier 3 support representative for Salesforce CPQ.

- Implementation
  - What's the deal with CPQ and DocuSign?
- CPQ Information
  - Object Flow: Creating, Amending, and Renewing Basic Contracts
- Troubleshooting
  - Quote Templates: View XML sent to be processed

Implementation

Information regarding implementing Salesforce CPQ.

Implementation

What's the deal with CPQ and DocuSign?

There are two DocuSign for Salesforce CPQ integrations right now. There's one from the Salesforce CPQ install page (install.steelbrick.com/installcpq). This one leverages the SBQQDS.DocusignPlugin plugin and is supported by CPQ Support. There's also a DocuSign for Salesforce CPQ available through the Appexchange. This one leverages the dfscpq plugin and is supported by DocuSign support. Going forward, our recommendation is to use the Appexchange version.

CPQ Information

General information related to Salesforce CPQ.

Object Flow: Creating, Amending, and Renewing Basic Contracts

Placeholder link until media can be embedded:

https://i.imgur.com/r42TKjm.mp4

Troubleshooting

Troubleshooting tips and resources.

Troubleshooting

Quote Templates: View XML sent to be processed

To see the XML sent to Salesforce CPQ document generation, paste the following text into your address bar after the salesforce.com/ replacing <quote_id> with the ID of your quote and <template_id> with the ID of your template.

/apex/SBQQ__EnhancedQuoteDocument?qid=<quote_id>&tid=<template_id>