



SOLUNUS
Enabling Customer Success

CPQ LITE

(PACKAGE INSTALLATION MANUAL)



REVISION HISTORY

Version No.	Release Date	Author	Details Of Changes	Reviewed By	Approved By
1.0		VAMSI THIYYAGURA	Initial Version		

CONTENTS

PRE-INSTALLATION STEPS4

 ENABLE QUOTES4

 ENABLE EMAIL DELIVERABILITY TO ALL USERS5

INSTALLATION OF THE PACKAGE6

POST INSTALLATION STEPS6

 CHANGE PAGE LAYOUT ASSIGNMENTS.6

 ADD CUSTOM LIST VIEW BUTTONS.7

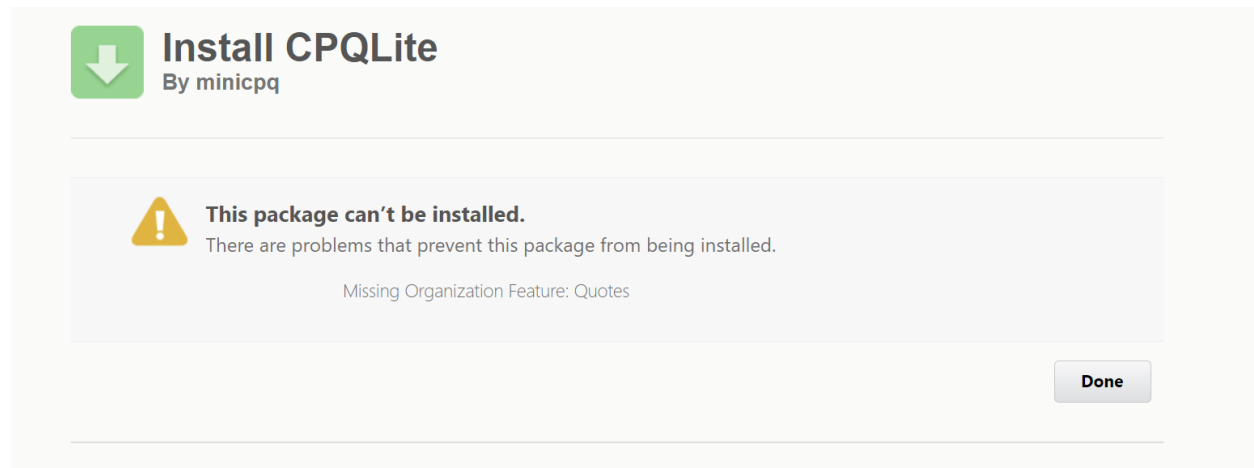
 ASSIGN PERMISSION SETS TO USERS.....8

 REMOVE CUSTOM PERMISSION FROM SYSTEM ADMIN PROFILE.....10

PRE-INSTALLATION STEPS

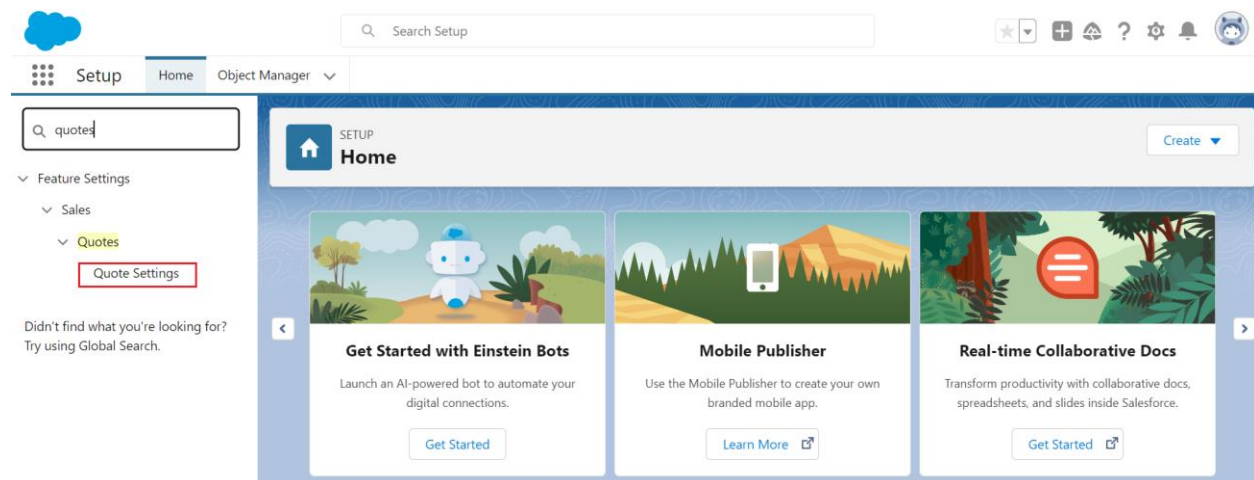
ENABLE QUOTES

Enable Quotes in the installation environment if not enabled. You will get an installation error like the below if not enabled.

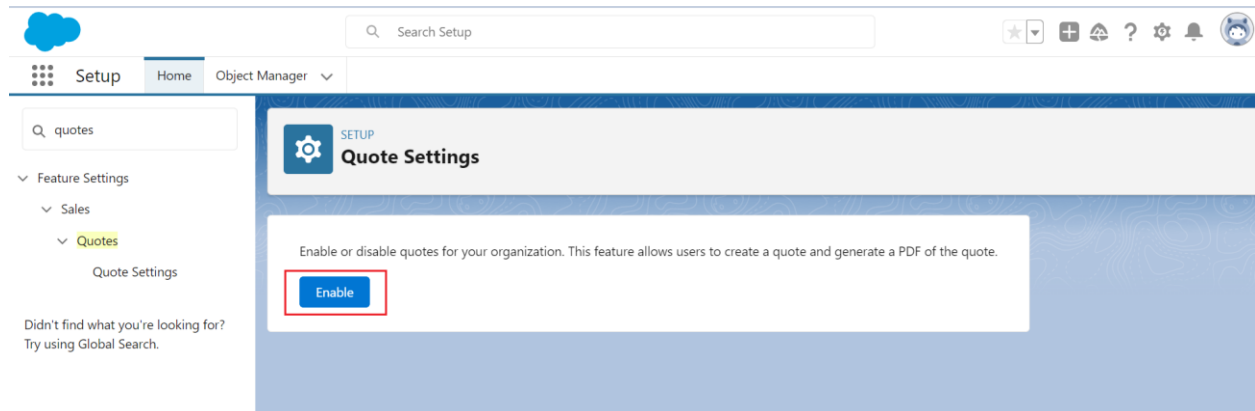


To enable quotes -

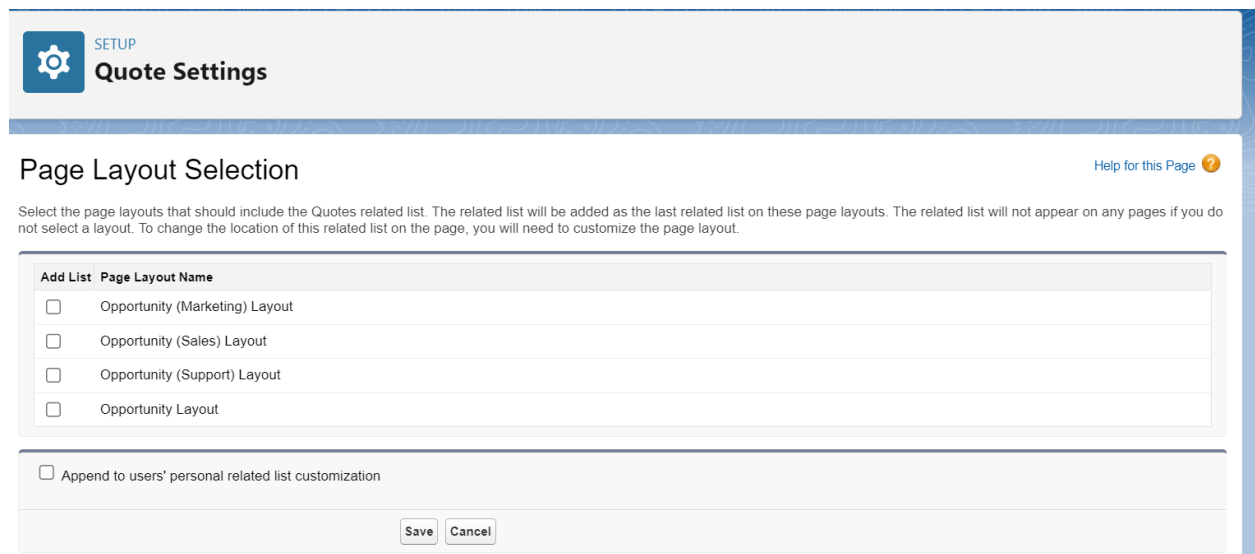
- Go to Set up.
- Search for Quotes Settings.



- Click the **Enable** button.



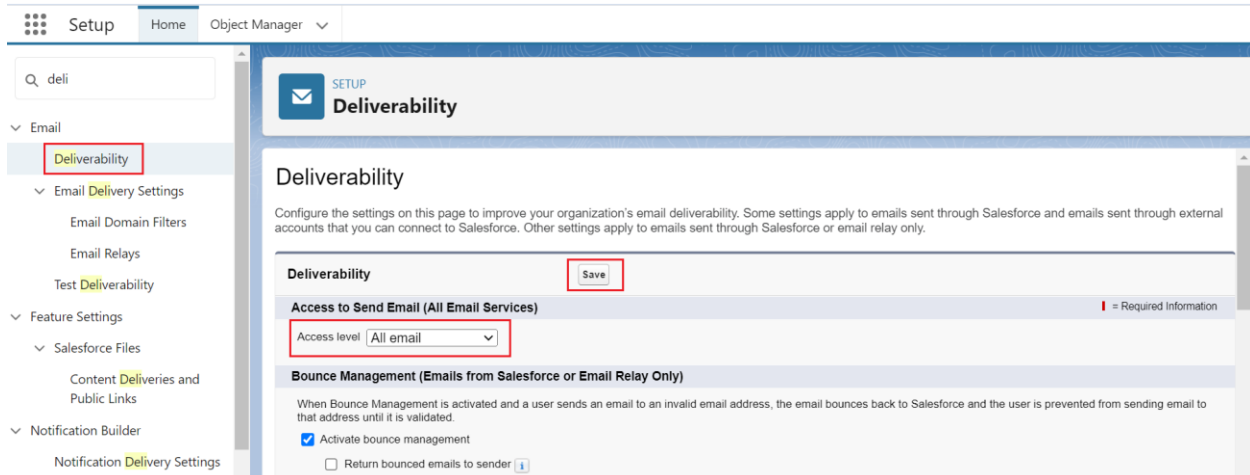
- Click on **Save**.



ENABLE EMAIL DELIVERABILITY TO ALL USERS

Enable email deliverability to all users. To do that,

- Navigate to Setup
- Search for Deliverability
- Select Deliverability under Email.
- Select All email as the access level.
- Click on Save.



INSTALLATION OF THE PACKAGE

1. Go to the installation URL, or, if you're installing the package from AppExchange, click **Get It Now** from the application information page.
2. Enter the Username and Password for the salesforce organization in which you want to install the package, and then click **Login**.
3. Select **Install in Production** or **Install in Sandbox**.
Note: If you're installing it into a sandbox, replace the www.salesforce.com or Login.salesforce.com portion of the package installation link with test.salesforce.com.
4. Accept the terms and conditions, then click on the **Confirm and Install**.
5. Enter your org credentials.

POST INSTALLATION STEPS

CHANGE PAGE LAYOUT ASSIGNMENTS.

CPQ-Lite provides a set of pre-packaged Page Layouts with recommended field configurations for account, opportunity, Quote, Quote Line Item, Contract and Product

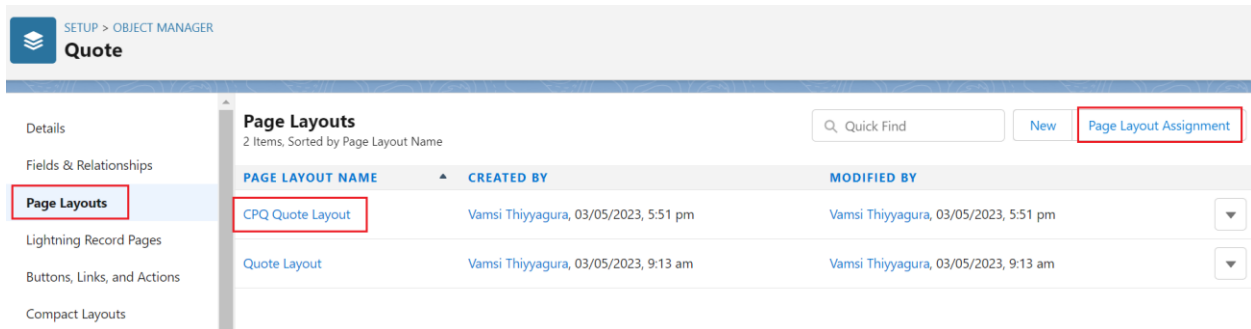
Assign page layouts to profile.

- a. Account CPQ Layout
- b. Opportunity CPQ Layout
- c. CPQ Quote Layout
- d. CPQ Contract Layout
- e. CPQ Product Layout
- f. CPQ Quote Line-Item Layout

To leverage the OOB fields and configurations, you need to assign these Page Layouts to the user **profiles** in your organization based on their roles and responsibilities.

Let's see how the CPQ Quote Layout can be assigned to a Profile.

1. Navigate to Setup >> Object Manager >> Quote >> Page Layouts.
2. Click on “Page Layout Assignment” button. You will be displayed with the list of all the profiles in the system.



SETUP > OBJECT MANAGER

Quote

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Page Layouts
2 Items, Sorted by Page Layout Name

Quick Find

New Page Layout Assignment

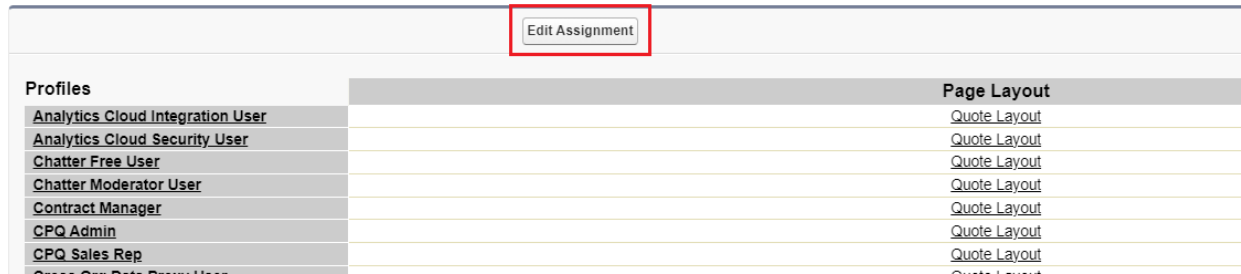
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
CPQ Quote Layout	Vamsi Thiyyagura, 03/05/2023, 5:51 pm	Vamsi Thiyyagura, 03/05/2023, 5:51 pm
Quote Layout	Vamsi Thiyyagura, 03/05/2023, 9:13 am	Vamsi Thiyyagura, 03/05/2023, 9:13 am

3. Click on Edit Assignment.

Page Layout Assignment

Quote

The table below shows the page layout assignments for different profiles.



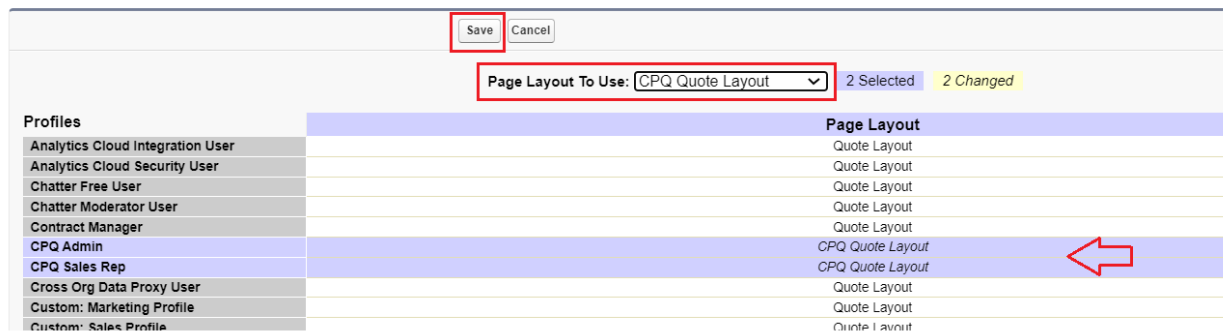
Profiles	Page Layout
Analytics Cloud Integration User	Quote Layout
Analytics Cloud Security User	Quote Layout
Chatter Free User	Quote Layout
Chatter Moderator User	Quote Layout
Contract Manager	Quote Layout
CPQ Admin	Quote Layout
CPQ Sales Rep	Quote Layout

4. Scroll to the Profile. Here we will be assigning to **CPQ Admin** and **CPQ Sales Rep**. Click on the Page Layout column next to the CPQ Admin and CPQ Sales Rep Profiles and select **CPQ Quote Layout** from the **Page Layout to Use** picklist at the top and click **Save**.

Edit Page Layout Assignment

Quote

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are layout from the dropdown.



Save Cancel

Page Layout To Use: CPQ Quote Layout 2 Selected 2 Changed

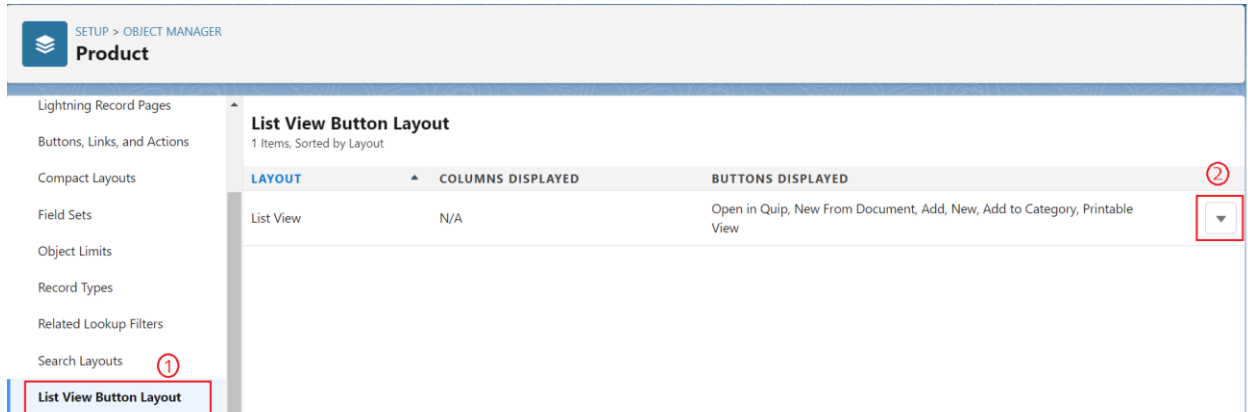
Profiles	Page Layout
Analytics Cloud Integration User	Quote Layout
Analytics Cloud Security User	Quote Layout
Chatter Free User	Quote Layout
Chatter Moderator User	Quote Layout
Contract Manager	Quote Layout
CPQ Admin	CPQ Quote Layout
CPQ Sales Rep	CPQ Quote Layout
Cross Org Data Proxy User	Quote Layout
Custom: Marketing Profile	Quote Layout
Custom: Sales Profile	Quote Layout

5. Similarly, you can change the Page Layout assignment for the other Page Layouts.

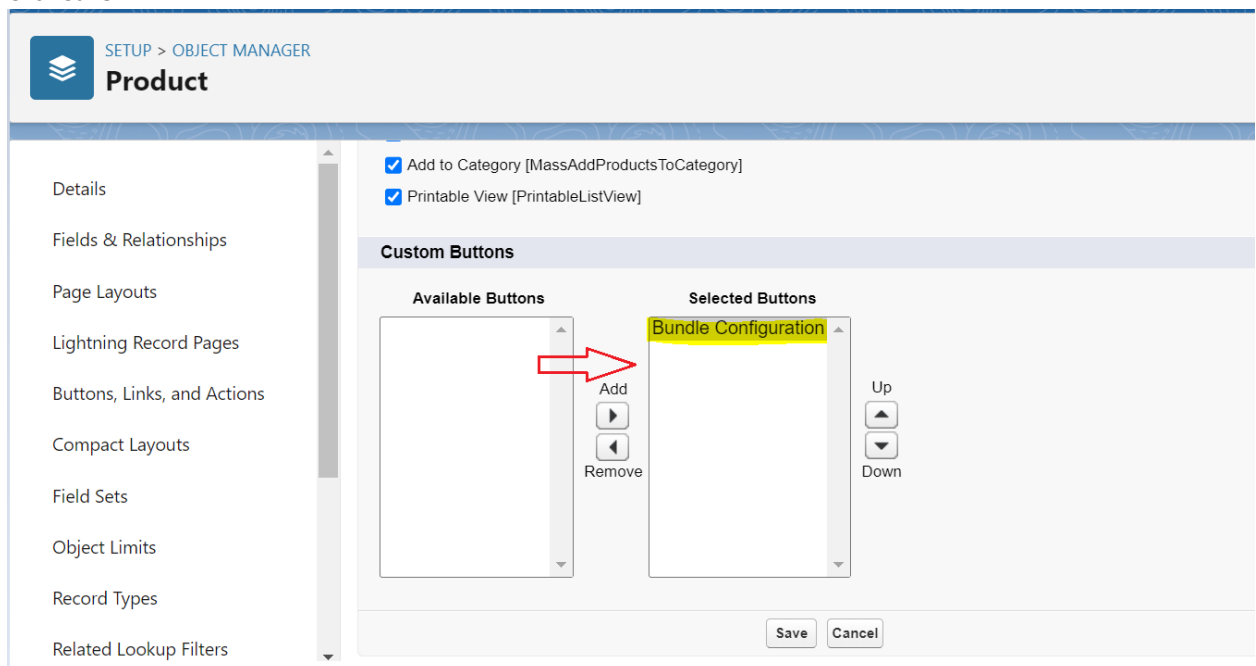
ADD CUSTOM LIST VIEW BUTTONS.

Add “**Bundle configuration**” button to the Product’s list view.

- Go to Object Manager >> Product >> Scroll down to the bottom in the left panel.
- Click on List view Button Layout
- Click on the drop down and click Edit.

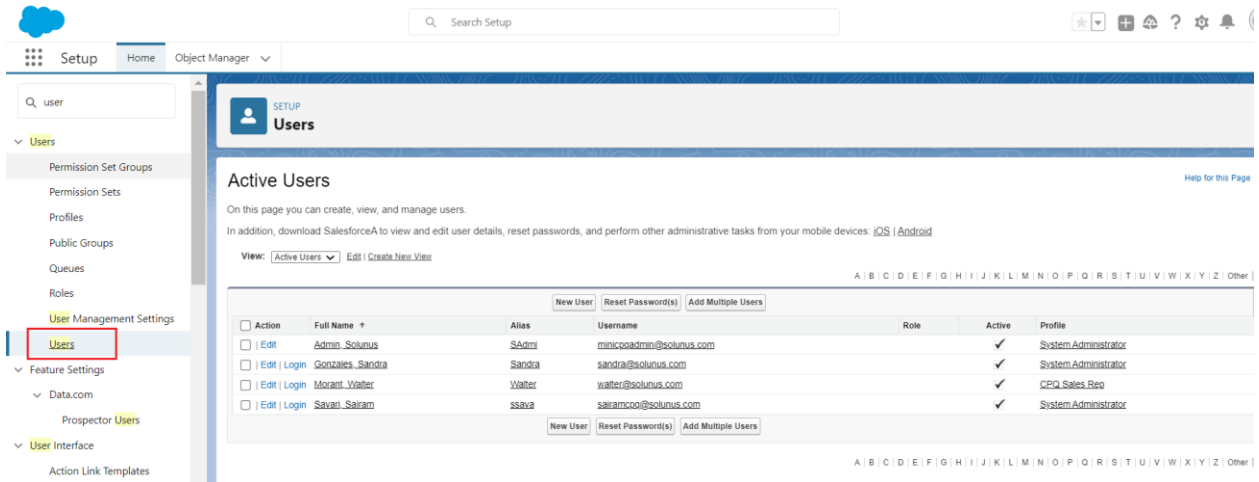


- Add Bundle Configuration to the selected buttons list.
- Click Save



ASSIGN PERMISSION SETS TO USERS

1. From Setup, enter users in the quick find box, then select Users.



Setup Users

Active Users

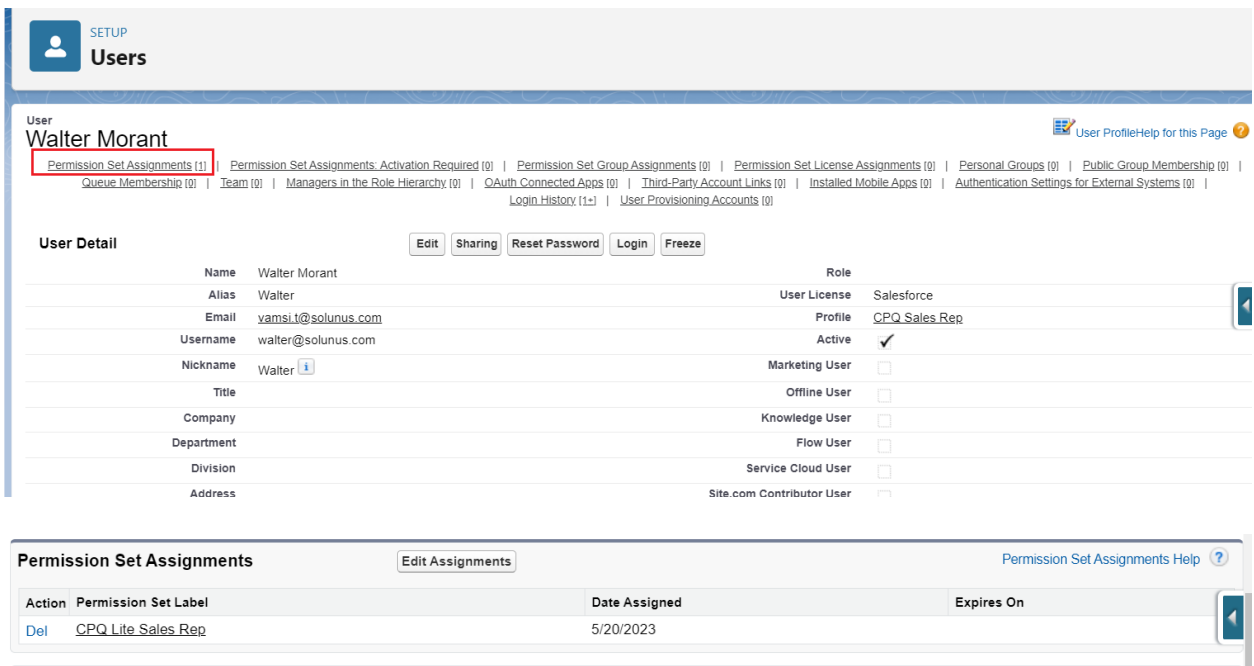
On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [Active Users](#) | [Edit](#) | [Create New User](#)

Action	Full Name	Alias	Username	Role	Active	Profile
☐ Edit	Admin, Solunus	SAdmin	minicoadmin@solunus.com		☒	System Administrator
☐ Edit Login	Gonzales, Sandra	Sandra	sandra@solunus.com		☒	System Administrator
☐ Edit Login	Morant, Walter	Walter	walter@solunus.com		☒	CPQ Sales Rep
☐ Edit Login	Savari, Sairam	ssavari	sairamco@solunus.com		☒	System Administrator

2. Select a User.
3. In the Permission Set Assignments related list, click Edit Assignments.



Setup Users

User: **Walter Morant**

[Permission Set Assignments \(1\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Connected Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(1+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

[Edit](#) | [Sharing](#) | [Reset Password](#) | [Login](#) | [Freeze](#)

Name	Walter Morant	Role
Alias	Walter	User License: Salesforce
Email	wamslt@solunus.com	Profile: CPQ Sales Rep
Username	walter@solunus.com	Active: ☒
Nickname	Walter	Marketing User: ☐
Title		Offline User: ☐
Company		Knowledge User: ☐
Department		Flow User: ☐
Division		Service Cloud User: ☐
Address		Site.com Contributor User: ☐

Permission Set Assignments [Edit Assignments](#) [Permission Set Assignments Help](#)

Action	Permission Set Label	Date Assigned	Expires On
Del	CPQ Lite Sales Rep	5/20/2023	

4. To assign a permission set, select it under Available Permission Sets and click **Add**. To remove a permission set assignment, select it under Enabled Permission Sets and click **Remove**.

Add CPQ Sales Rep permission for a user who needs to perform the activities of sales reps.
Add CPQ Lite Admin permission for a user who needs access to perform the activities of an admin.

Available Permission Sets

ActionPlans
Analytics View Only User
Budget Management
Buyer
Buyer Manager
CGC Processing Services Register
CPQ Lite Admin
CRM Analytics Platform Admin
CRM Analytics Platform User
CRM Analytics Plus Admin

Add
Remove

Enabled Permission Sets

CPQ Lite Sales Rep

Save Cancel

Available Permission Sets

CGC Processing Services Register
CPQ Sales Rep
CRM Analytics Platform Admin
CRM Analytics Platform User
CRM Analytics Plus Admin
CRM Analytics Plus User
CRM Analytics for Sales Cloud
Commerce Admin
Customer Experience Analytics Admin
Customer Experience Analytics User

Add
Remove

Enabled Permission Sets

CPQ Lite Admin

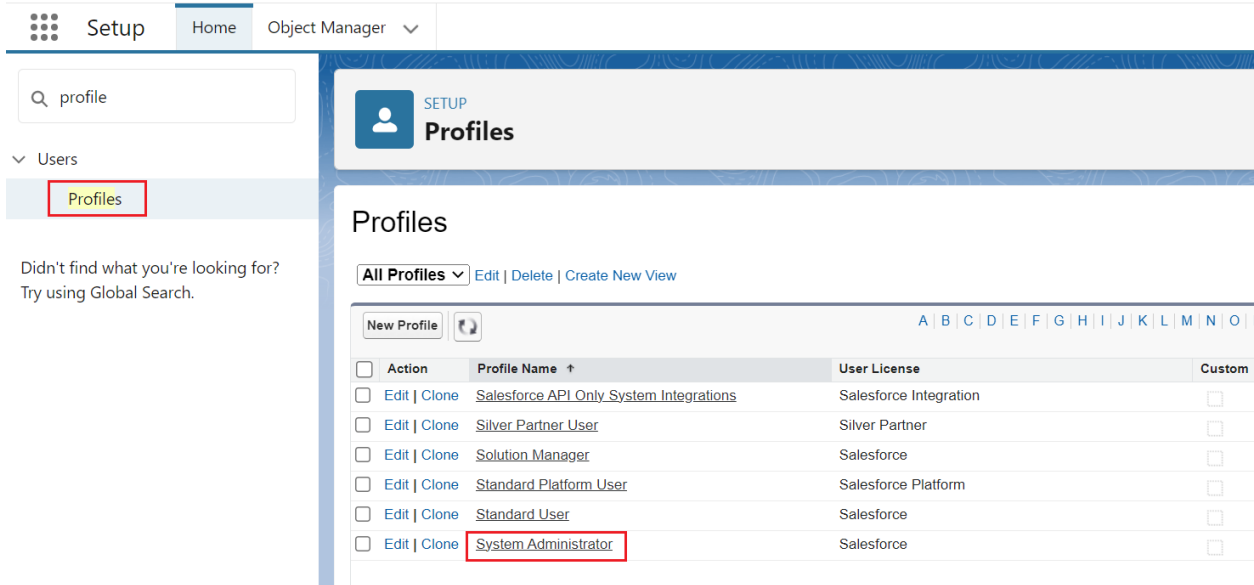
Save Cancel

REMOVE CUSTOM PERMISSIONS FROM ADMIN PROFILE.

Edit Tiers button is not available by default. To enable the permission for admins, we need to remove a custom permission from the profile.

To remove custom permission from system admin profile,

- Navigate to setup.
- Search for Profiles.
- Select System admin profile.



Setup Home Object Manager

Q profile

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP Profiles

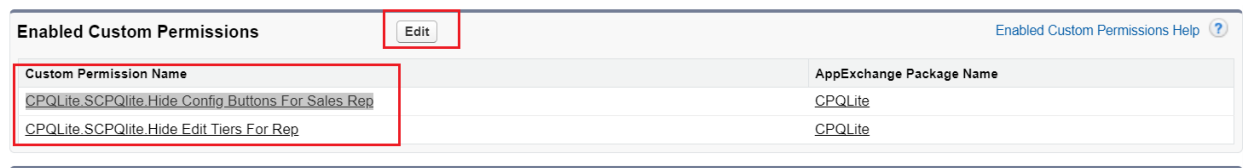
Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	
Edit Clone	Silver Partner User	Silver Partner	
Edit Clone	Solution Manager	Salesforce	
Edit Clone	Standard Platform User	Salesforce Platform	
Edit Clone	Standard User	Salesforce	
Edit Clone	System Administrator	Salesforce	

- Scroll down to the Enabled Custom Permissions, click on Edit.



Enabled Custom Permissions Edit Enabled Custom Permissions Help

Custom Permission Name	AppExchange Package Name
CPQLite.SCPQLite.Hide Config Buttons For Sales Rep	CPQLite
CPQLite.SCPQLite.Hide Edit Tiers For Rep	CPQLite

- Select ***“CPQLite.SCPQLite.Hide Edit Tiers For Rep”*** from the Enabled Custom Permissions section and Remove it.
- Select ***“CPQLite.SCPQLite.Hide Config Buttons For Sales Rep”*** from the Enabled Custom Permissions section and Remove it.
- Click on Save.

Enable Custom Permissions

Available Custom Permissions

CPQLite.SCPQLite.Hide Config Buttons For Sales Rep
 CPQLite.SCPQLite.Hide Edit Tiers For Rep

Add

Remove

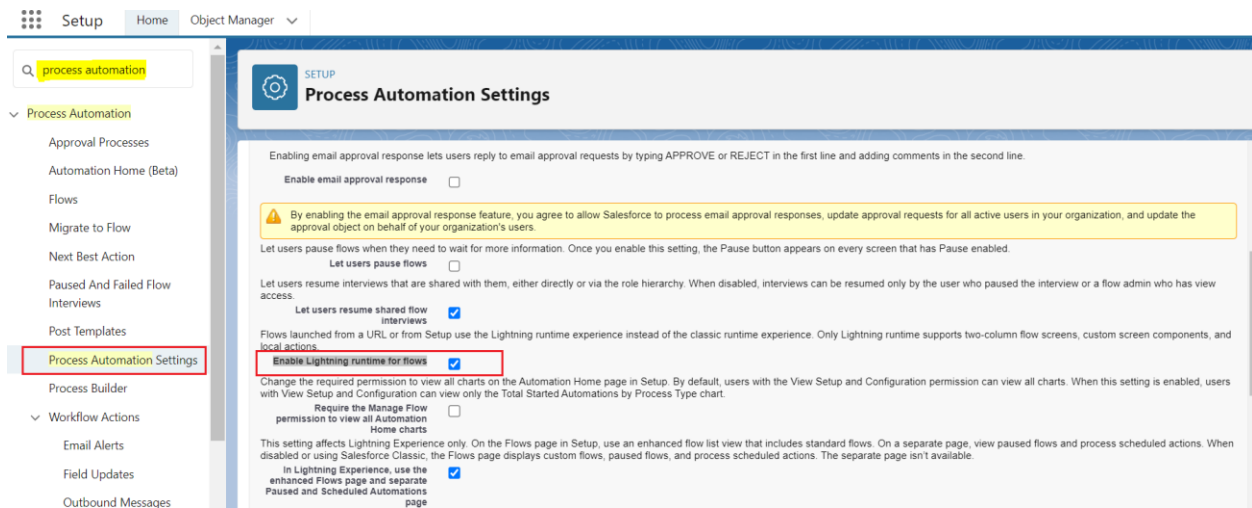
Enabled Custom Permissions

--None--

ENABLE LIGHTNING RUNTIME FOR FLOWS

Check if the Lightning runtime for flows is enabled. If not enable it.

Flows launched from a URL or from Setup use the Lightning runtime experience instead of the classic runtime experience. Only Lightning runtime supports two-column flow screens, custom screen components, and local actions.



The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Process Automation' menu item is highlighted. The main content area displays the 'Process Automation Settings' page. The 'Enable Lightning runtime for flows' checkbox is checked and highlighted with a red box. The page also includes a warning about enabling email approval response and a note about the Lightning runtime experience.