Configure and Administer a Salesforce CPQ Solution
CPQ301

Job Role:
Administrator

Duration:
5 Days

Learn how to set up end-to-end Salesforce Configure, Price, Quote (CPQ) solutions with out-of-the-box functionality. This 5-day instructor-led course will teach you how to configure products, create discount and pricing methods, and manage subscriptions to implement robust CPQ solutions that meet your business requirements.

Overview

Who should take this course?
This course is intended for experienced Salesforce administrators, business analysts, and implementation specialists who want to develop a technical understanding of Salesforce CPQ administration. It is also suitable for solution architects, implementation consultants, and developers configuring CPQ solutions. Additionally, it is a fundamental course for individuals interested in obtaining their CPQ Specialist credential.

When you complete this course, you will be able to:

✓ Implement CPQ solutions that meet business requirements.

✓ Set up products, bundles, and product rules.

✓ Modify a Lightning app to meet business needs.

✓ Build price rules to populate field values while quoting or configuring a bundle automatically.

About CloudWise

We offer Authorized Salesforce training with several guaranteed-to-run classes each month. We are an industry-leading authorized Salesforce training provider and part of Layer 8 Training.

✓ Establish appropriate system discount and pricing methods.

✓ Configure dynamic output document generation.

✓ Manage subscription products, including renewal and amendment.

Lessons & Topics

Course Introduction
- Review Course Objectives
- Set Learner Expectations
- Establish Housekeeping Rules
- Explore Additional Course Resources
- Discuss Exam Quick Facts

Introduction to CPQ
- Discover CPQ
- Understand the Business Case for CPQ
- Play an End-to-End Solution Demo
- Build a Quote

Object Model Foundations
- Explore Products, Price Books, and Price Book Entries
- Review Product Fields Integral to Basic Salesforce CPQ Functionality

Product Selection
- Modify Out-of-the-Box Button Behavior for Product Selection
- Create Dynamic Search Filters
- Review Guided Selling

Bundle Configuration
- Define and Build Product Bundles
- Enforce Business Logic with Product Features

Option Selection Guidelines
- Enforce Business Logic with Option Constraints

Product Rules
- Define Product Rules
- Enforce Business Logic with Product Rules
- Build Product Rules Using Supporting Objects

Pricing Methods
- Discover Pricing Waterfall Default Flows
- Review List Pricing, Cost Plus Markup, and Block Pricing
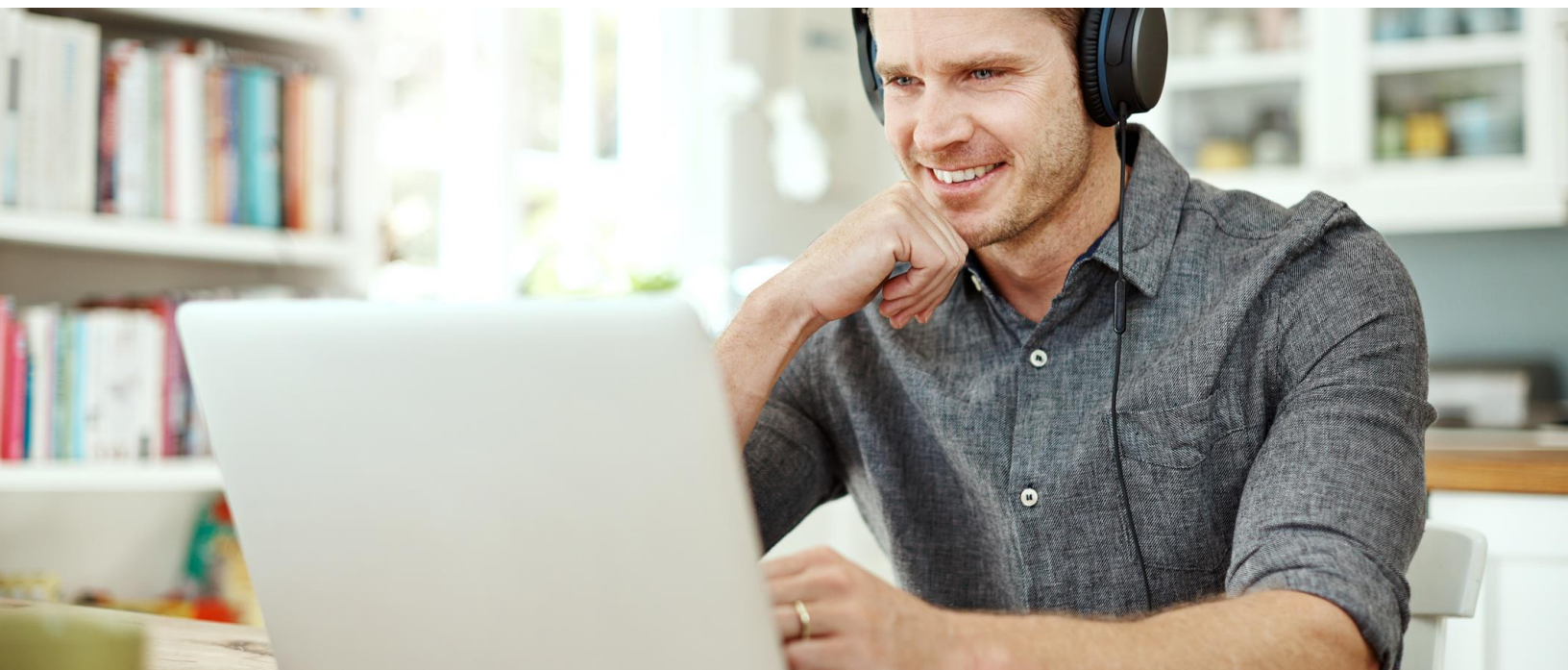- Use Contracted Pricing for Negotiated Prices

Subscription Pricing
- Configure Subscription and Proration Pricing Methods
- Understand how Subscription Pricing Methods Affect List and Regular Price

Discounting
- Compare Discounting Strategies
- Build a Discount Schedule

Lessons & Topics Cont.

Price Rules
- Set Values for Quote and Quote Line Fields Declaratively
- Review CPQ Advanced Quote Calculator Events and Conditions
- Understand Price Action Sources
- Create Lookup Queries to Outsource Evaluation to a Lookup Object

Advanced Approvals
- Compare and Contrast the Advanced and Native Approvals
- Define Key Approval Terms

Quote Templates
- Generate Dynamic Output Documents
- Create Conditional Template Content

Localization and Multicurrency
- Accommodate Localization
- Define Localization and How It Works in CPQ

Orders
- Review Business Purposes of an Order
- Define the Data Model for Orders
- Describe Data Requirements To Generate Orders

Contracts, Renewals, and Amendments
- Generate New Contracts To Manage Active Subscriptions
- Review Amendment and Renewal Processes
- Discover Renewal Pricing Methods

Capstone
- Troubleshoot Common Scenarios in Salesforce CPQ
- Design a Solution

Contact us for upcoming classes and pricing:

Email: register@cloudwiselearning.com
Phone: 888-504-8872