

CONFIGURE AND ADMINISTER A SALESFORCE CPQ SOLUTION (CPQ301)



OVERVIEW

Discover how to administer end-to-end Salesforce Configure, Price, Quote (CPQ) solutions with out-of-the-box functionality. In this 5-day instructor-led course, learn how to configure products, create discount and pricing methods, and manage subscriptions in order to implement robust CPQ solutions that meet business requirements.

WHO SHOULD TAKE THIS COURSE?

This course is designed for experienced Salesforce administrators, business analysts, and implementation specialists who are interested in gaining a technical understanding of Salesforce CPQ administration. It is also designed for solution architects, implementation consultants, and developers who are responsible for configuring CPQ solutions. This is also a great foundational course for anyone interested in earning 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
- Build Price Rules to Automatically Populate Field Values while Quoting or Configuring a Bundle
- Establish appropriate System Discounts and Pricing Methods
- Configure Dynamic Output Document Generation
- Manage Subscription Products, including renewal and amendment

PREWORK

Please complete the following trailmix before attending our expert-led class:

[Trailmix, Trailhead Academy](#)

IMPORTANT: If you use your personal computer and a configuration is described in the [Computer Setup Guide](#), you must complete it before attending the class.

CERTIFICATION

CPQ301 is recommended to prepare Salesforce Certified CPQ Specialist exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the [Exam Guide](#). Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided.



DURATION
5 days

DELIVERY FORMAT
- Classroom
- Virtual

LANGUAGE
Course in French /
Materials in English

USER INTERFACE
Lightning Experience

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LESSONS & TOPICS

Course Introduction

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

Introduction to CPQ

- Discover CPQ
- Understand the Business Case for CPQ
- Watch 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

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
- Define 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