

SALESFORCE CPQ ADMIN ESSENTIALS FOR EXPERIENCED ADMINISTRATORS



MODULES & TOPICS

Day 1

Products, Bundling, Product Rules

- Product fields and related objects integral to basic Salesforce CPQ functionality
- Configurable Product Bundles and the resulting user interface and experience
- Enforcing business logic with Product Features, Option Constraints, Validation Rules, Selection Rules, and Dynamic Bundles

Day 2

Custom Actions and UI Customizations

- Modifying out-of-the-box button behavior for product selection
- Alternate quote line editor views
- Guided selling decision trees and custom prompts

Pricing Methods and Discounting

- Pricing Waterfall
- List pricing, cost plus markup, and block pricing
- Contracted pricing
- Multi-Dimension Quoting
- Tiered discounting

Day 3

Price Rules and Lookup Objects

- Programmatically setting values for Quote and Quote Line fields
- Advanced events and conditions
- Price Action sources, including static values, Summary Variables, formulas, and Lookup tables
- Lookup objects and Lookup Queries

Day 4

Contracting

- Generate new contracts to bring quote data to the account
- Amendment and renewal processes

Output Documents

- Generating dynamic output documents
- Conditional Template Content
- Proposal coloring and branding

Localization and Multi-Currency

- Accommodating translations and multiple currencies



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learn Salesforce

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