

Configure and Administer a Salesforce CPQ Solution (CPQ301)

Course Contents

Introduction to CPQ

- Understand the Business Case for CPQ
- Watch an End-to-End Solution Demo
- Build a Quote

Object Model Foundations

- Get Familiar with 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
- 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 (Including Validation Rules, Alert Rules, Selection Rules, and Dynamic Bundles)
- Build Product Rules Using Supporting Objects (Including Error Conditions, Product Actions, Summary Variables, Configuration Rules, and Configuration Attributes)

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 Calculation Events and Conditions
- Understand Price Action Sources (Including Static Values, Summary Variables, Formulas, and Lookup Tables)
- Create Lookup Queries to Outsource Evaluation to a Lookup Object

Advanced Approvals

- Compare and Contrast the Advanced Approval Package Versus Native Approvals
- Define Approvers, Approval Chains, Approval Variables, and Approval Rules to Meet Specific Business Requirements

Quote Templates

- Generate Dynamic Output Documents
- Create Conditional Template Content

Localization and Multicurrency

- Make Accommodations for 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 Related to an Account
- Review Amendment and Renewal Processes
- Review Renewal Pricing Methods