

Configure and Administer a Salesforce CPQ Solution (CPQ301)

Duration: 40 Hours (5 Days)

Overview

The Configure and Administer a Salesforce CPQ Solution (CPQ301) course is designed to equip learners with the skills required to set up, configure, and maintain a Salesforce CPQ (Configure, Price, Quote) solution. This comprehensive training encompasses a deep dive into the CPQ platform, starting with the business case for CPQ and demonstrating an end-to-end solution through a series of structured modules and lessons. Participants will gain a thorough understanding of the CPQ object model, learn how to manage Product selection, and master the intricacies of Bundle configuration. They'll be taught to enforce business logic through Product rules and Option selection guidelines, ensuring adherence to company policies. The course also covers various Pricing methods, Subscription pricing, and Discounting strategies, enabling learners to handle complex pricing scenarios. Advanced topics include Advanced approvals, Quote templates, localization and multicurrency considerations, as well as managing Orders, Contracts, Renewals, and Amendments. By completing the CPQ301 course, individuals will possess the knowledge and practical experience to effectively administer a Salesforce CPQ solution, improving sales efficiency and accuracy within their organizations.

Audience Profile

The course "Configure and Administer a Salesforce CPQ Solution (CPQ301)" equips professionals with advanced Salesforce CPQ skills for configuring complex quoting solutions.

- Target audience for the course includes:
- Salesforce Administrators
- CPQ Specialists
- Technical Solution Architects
- Sales Operations Managers
- IT Business Analysts
- Salesforce Consultants
- Product Managers working with Salesforce
- CRM Managers
- Sales Process Engineers
- Systems Integrators working on Salesforce projects
- Business Intelligence Analysts involved in sales automation processes
- Project Managers overseeing Salesforce implementations
- Salesforce Developers looking to expand their skillset into CPQ

Course Syllabus

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