

SALESFORCE CPQ ADMIN ESSENTIALS FOR EXPERIENCED ADMINISTRATORS



OVERVIEW

Comprehensive and hands-on, this course is essential for CPQ administrators by providing a detailed and in-depth look at Salesforce CPQ and its applications. We recommend experienced administrators take this course before starting a Salesforce CPQ implementation or when taking over an existing implementation.

WHO SHOULD TAKE THIS COURSE?

Covering all the topics from the Salesforce CPQ Admin Essentials for New Administrators but with a greater technical emphasis, this course will also provide guidance on design implications and use cases for hands-on exercises. The class is designed for experienced Administrators who will have prior experience implementing Salesforce CPQ solutions in a customer-facing role, as well as solution architects, implementation consultants, or developers seeking to understand full capabilities in order to formulate technical solutions within Salesforce CPQ.

WHEN YOU COMPLETE THIS COURSE, YOU WILL BE ABLE TO:

- Set up products, bundles, and product and pricing rules targeting several objects.
- Lead the technical configuration of discounting, pricing methods, and output document generation.
- Leverage the events, objects, settings, and methods of the contract creation, renewal, and amendment processes.
- Harness Salesforce CPQ's advanced capabilities and explore the possibility of more customized solutions and development.
- Utilize Advanced Approvals in conjunction with Salesforce CPQ quoting processes.
- Formulate sound technical solutions to common CPQ business requirements.
- Make significant progress in preparing for the Salesforce Certified CPQ Specialist exam.

PREREQUISITES

A strong Salesforce Admin background is assumed for this course. Salesforce Administrator certification is strongly recommended. You do not need to complete Salesforce CPQ Admin Essentials for New Administrators to take this course.



DURATION

- 4 days

DELIVERY FORMAT

- Classroom

AUDIENCE

Experienced admins, solution architects, implementation consultants, or developers of Salesforce CPQ

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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 3 (continued)

Advanced Approvals

- Multi-tiered approval processes, with serial and parallel approval steps
- Dynamically assigning approvers within an approval workflow
- Smart approval rule configuration

Contracting

- Generate new contracts to bring quote data to the account

Renewals and Amendments

- Amendment and renewal processes
- Renewal pricing methods and replacement products
- Account co-termination behavior
- Best practices: Add-ons vs Amendments
- Bundling concerns for amendments

Day 4

Output Documents and Docusign

- Generating dynamic output documents
- Conditional Template Content
- Proposal coloring and branding
- Enabling output document for Docusign e-signatures

Localization and Multi-Currency

- Accommodating translations and multiple currencies

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Salesforce University offers a comprehensive catalog of courses and certifications to help you administer, develop, and use your organization's Salesforce environment. Whether you need a customized private course for your whole team or an in-depth instructor-led classroom experience for one person, Salesforce University can help you take the next steps on your journey to success. Contact us today to learn how we can help you get the most out of your Salesforce investment.

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