

SALESFORCE CPQ ADMIN ESSENTIALS FOR NEW ADMINISTRATORS



OVERVIEW

Hands-on foundational training providing you with the basic knowledge needed to set up, configure, and maintain a Salesforce CPQ instance, enabling your success with Salesforce CPQ. We recommend new administrators take this course before starting a Salesforce CPQ implementation or when taking over an existing implementation.

WHO SHOULD TAKE THIS COURSE?

This course is ideal for a new system administrators responsible for the setup, configuration, and maintenance of their organization's Salesforce CPQ application. Also for sales ops, IT managers, power users, and other users who would benefit from a deeper knowledge and understanding of the capabilities of Salesforce CPQ.

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

- Set up products, bundles, and product and pricing rules.
- Advise and implement out-of-box configuration of discounting, pricing methods, and output document generation.
- Navigate the essential events and objects fundamental to the contract creation, renewal, and amendment process.
- Initiate a solid and direct learning path toward passing the Salesforce Certified CPQ Specialist exam.

PREREQUISITES

None. Familiarity with the Salesforce Classic interface and experience with creating custom fields and picklist values is helpful, but not necessary.



DURATION

- 2 days

DELIVERY FORMAT

- Classroom
- Virtual Classroom

AUDIENCE

New admins, Sales Ops, IT managers, and power users 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, and simple Validation and Selection Product Rules.

Day 2

Pricing Methods and Discounting

- Pricing waterfall
- List pricing, cost plus markup pricing, and block pricing
- Contracted pricing
- Tiered discounting

Price Rules

- Programmatically setting values for Quote and Quote Line fields
- Events and conditions and leading to the execution of Price Actions
- Price Action sources, including static values and Summary Variables

Contracts and Renewals

- Transferring quote data to the account
- Contract lifecycle with amendments and renewals

Quote Templates

- Generating dynamic output documents



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