

# CONFIGURE AND ADMINISTER A SALESFORCE CPQ SOLUTION (CPQ301)



## OVERVIEW

Discover how to configure an end-to-end Salesforce CPQ solution with out-of-the-box functionality. In this 5-day class, our CPQ experts will give you an in-depth look at Salesforce CPQ and its applications. You'll learn how to set up and manage products, configure discount and pricing methods, create and manage subscriptions, and formulate solutions to meet common CPQ business requirements so you can successfully implement a Salesforce CPQ solution for your company.

## WHO SHOULD TAKE THIS COURSE?

This class is ideal for experienced Salesforce Administrators, business analysts, and implementation specialists looking to gain a greater technical understanding of Salesforce CPQ Administration. It's also designed for experienced administrators, solution architects, implementation consultants, and developers looking to understand the full capabilities of Salesforce CPQ in order to formulate solutions for their business. This class is also a great foundation builder for anyone looking to earn the Salesforce CPQ Specialist credential.

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

- Set Up Products, Bundles, and Product Rules
- Build Price Rules to Automatically Populate Field Values while Quoting or Configuring a Bundle
- Set Up Appropriate System Discounts and Pricing Methods
- Configure Dynamic Output Document Generation
- Manage Subscription Products (Including the Processes for Renewing and/or Amending Them)
- Formulate Sound Solutions to Common CPQ Business Requirements
- Make Significant Progress in Preparing for the Salesforce Certified CPQ Specialist Exam

## PREWORK

Please complete the following trailmix before attending our expert-led class:

[Trailmix, Trailhead Academy](#)

**IMPORTANT** : If you use your personal computer and a configuration is described in the [Computer Setup Guide](#), you must complete it before attending the class.

## CERTIFICATION

CPQ301 is recommended to prepare Salesforce Certified CPQ Specialist exam. Other courses and self-study materials are recommended for this exam. The complete list of prerequisites is provided by Salesforce in the [Exam Guide](#). Registration for an inter-company training session entitles you to a voucher to pass the corresponding certification exam. The voucher, valid for 6 to 12 months, is sent to the trainee on request, at no additional cost. Note that this offer is valid for only one voucher per certification; If you register for multiple courses preparing for the same certification, you will be entitled to only one free voucher.

### Note :

- Salesforce certification exam doesn't take place during the training and it's up to the delegate to register to the exam via the webassessor
- We don't recommend passing the Salesforce certification exam directly after attending the course. Additional work must be provided.



**DURATION**  
5 days

**DELIVERY FORMAT**  
- Classroom  
- Virtual

**LANGUAGE**  
Course in French /  
Materials in English

**USER INTERFACE**  
Lightning Experience

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## LESSONS & TOPICS

### Course Introduction

- Review Course Objectives
- Set Learner Expectations
- Review Housekeeping Rules
- Explore Additional Course Resources
- Review Exam Quick Facts

### 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

### Capstone

- Class Project: Troubleshoot Common Scenarios in Salesforce CPQ
- Design a Solution

### Learn the Foundations of AI

Trailhead Academy classes include a lesson where you'll learn AI concepts, responsible AI practices, and how to use AI and Salesforce together to drive productivity.