Salesforce CPQ Training

Course Curriculum

CRIZAL CLOUD
TECHNOLOGIES

Salesforce CPQ – Course Curriculum

Purpose of CPQ

- What is CPQ
  - o Real life examples and Use cases
- Benefits of CPQ
  - o Benefits to the sales teams, customers, and enterprise planning

Architecture

- High level Architecture
  - o How it fits into the force.com platform as well as Sales cloud
- Objects of CPQ
  - o Data model and object relationships

CPQ Package Setting

- Installation of CPQ managed package
  - o How to install the CPQ package in your org
- Update Package Settings
  - o Authenticate and customize basic package settings
- Steelbricks CPQ product fields
  - o A review of CPQ OOB product fields

Creating Quote

- Pre-Requisites
  - o Creating an Account, Contact and Opportunity
- Creating Quote
  - o Create a simple quote with OOB page layout

Configuration

- Products and Product Bundle
  - o Types of products, Types of Bundles, Benefits of product bundle, Creating product bundles, Add bundle specific field sets…
- Use Product Options for a Bundle
  - o Product option basics, Create product options and driving selection behavior…
- Create Option Constraints for a Bundle
  - o Uses of option constraints, types of option constraints…
- Create Configuration Attributes for a Bundle
  - o Use of configuration attribute in bundles, product options and quotes…
- Quote Line Editor Overview

Product Rules

- Create Product Rule
  - o Use cases, setting up product rules, key guidelines…
- Selection Product Rules and Using Lookup Queries
- Validation Product Rules

- Alert Product Rules
- Create a Dynamic Bundle(Using Filter rules)
  - Product Feature, Configuration Attribute using product rule selection…

Custom Actions

- Create Custom Action
  - Use of custom action, creating custom action, parameters of custom action, guidelines for custom action…

Guided Selling

- Guided Selling
  - Uses of guided selling in B2C and B2B, Practical walkthrough, Benefits of guided selling…

Pricing

- Pricing Methods
  - Discuss various types of pricing available in CPQ i.e. Block pricing, POT pricing, Option pricing, Cost plus markup pricing, contracted pricing…
- Create a Discount Schedule
  - Creating discount schedule and applying it to products, product options and product features, override discount schedule…
- Subscription Pricing
  - Subscription products, Subscription pricing types, creating subscriptions, benefits of subscriptions…
- Multi-Dimensional Quoting (MDQ)
  - Extending subscription with MDQ, Guidelines and Constraints in using MDQ products…
- Pricing Rules
  - Create Price Rules, Create Price Rules using Lookup Queries, Pricing rules benefits…

Contracting

- Create a Contract and Renewal Opportunity
  - Converting opportunity to contract, manual and automatic renewal of contract…
- Amend a Contract
  - Amend contract to replace a product, quantity, or terms
- Cancel a contract
  - Terminate subscription

Quote Templates

- Quote Template Basics
  - Template structure, creating quote templates…
- Custom Quote Template
  - Styling quote template

Approvals

- Approvals
  - Create new approver, create approval chains, create approval rule, configure approval conditions…

Miscellaneous

- CPQ Best Practices for implementation, Big picture of Revenue cloud & how CPQ fits in