

**Salesforce CPQ Specialist**

**Course Number:** SF-140
**Duration:** 5 days

**Overview**

This private, live online or in-person Salesforce CPQ Specialist training course teaches attendees how to deploy CPQ in their organization and helps them prepare for the [Salesforce CPQ Specialist certification exam](https://trailhead.salesforce.com/credentials/cpqspecialist). This class is equivalent to the Configure and Administer a Salesforce CPQ Solution (CPQ301) class offered by Salesforce.

**Prerequisites**

Students should have taken [Salesforce Administration in Lightning Experience](file:////training/salesforce-administration) or have equivalent experience with Salesforce.

**Materials**

All Salesforce training students receive comprehensive courseware.

**Software Needed on Each Student PC**

Salesforce is web-based and attendees only need an Internet connection and modern web browser for training. Salesforce recommends Chrome.

**Objectives**

* Ensure the creation of a technically valid quote through the configuration of products, including bundles and product rules
* Enforce the creation of a commercially viable quote through price books, price rules, and discounting methods
* Manage the quote process including document generation and advanced approvals
* Handle subscriptions and assets
* Handle amendments and renewals
* Track the quote to invoice process including orders and renewals
* Understand the different steps to a successful implementation
* Incorporate best practices for deployment and system maintenance

**Outline**

* Course Introduction
	+ Course Aims and Overview
	+ Certification and Exam Review
	+ Scenario Introduction: GenWatt
	+ Setting up the Practice Environment
* Package Installation and Customization
	+ Package Configuration
		- Initial Deployment
		- Patches and Upgrades
	+ Installing CPQ Packages
* CPQ Overview
	+ The Lead To Cash Process
		- The Lead to Cash Process
		- What is CPQ and where does it fit into the lead to cash process?
	+ How End Users Use CPQ
		- Review of Interfaces
		- Building a Quote in the QLE
		- Build a Simple Quote
	+ Technical Review
		- CPQ Architecture Overview
* Required Development Skills and Concepts
	+ Licensing and User Permissions
		- Managing Licensing and Permissions
		- Create new user and apply correct licensing and permissions
	+ Data Model Customization
		- Data Model Management
		- Twin field from Product object to Quote Line object
	+ Automation Options
		- Declarative Automation
		- Programmatic Options
* Configuration
	+ Product and Pricebooks
		- Product Types
		- Configuring Products
		- Use Cases For Multiple Price books
	+ Product Bundling
		- Creating a bundle
		- Product Code Configuration
		- Configuration Attributes
		- Option Constraints
		- Advanced Bundling Concepts
	+ Product Rules
		- Product Rule Types
		- Lookup Queries
		- Summary Variables
	+ User Interactions
		- Favorites
		- Search Filters
		- Quote Groups
		- Guided Selling
		- Custom Actions
* Pricing
	+ Pricing Methods
		- Pricing Waterfall
		- List vs Cost
		- Block Pricing
		- Contract Pricing
		- Percent of Total Pricing
		- Usage Based Pricing
		- Localization and Multicurrency
	+ Discounting
		- Additional Quote Discounts
		- Discount Schedules
		- Package and Option Discounts
		- Partner and Distributor Discounts
		- Contract Discounts
	+ Price Rules
		- Price Rule Structure
		- Calculation Events
		- Use Case: Applying values from lookup tables
		- Use Case:  Bypass Formula Field Limits For Complex Calculations With Summary Variables
		- Use Case: Update other objects
		- Price Rule Best Practices
* Quote Generation and Management
	+ Document generation
		- Quote Templates
		- Multidimensional Quotes
		- Attachments and Additional Documents
		- Translation
		- Other Document Generation Options
	+ Approvals
		- Standard Salesforce Approvals
		- Advanced Approvals Module
	+ Interactions with Other Objects
		- Syncing With Opportunities
		- Order Generation
		- Asset Generation
		- Contract Generation
	+ Lifecycle Management
		- Amendments and Addons
		- Renewals
* Advanced topics
	+ Lifecycle Management
		- Quote Plugins and CPQ API
		- E-Sign Integration
		- Integration with Billing
* Practice Exam and Question Review