

**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