

Course Overview

This course provides a comprehensive understanding of Salesforce CPQ (Configure, Price, Quote) and its application in automating and optimizing sales processes.

Participants will learn to configure CPQ settings, manage pricing, create quotes, and integrate CPQ with Salesforce Billing and ERP solutions. The course includes real-world scenarios, hands-on projects, and guidance on certification preparation to ensure learners gain industry-ready expertise.

Module 1: Introduction to Salesforce CPQ

- What is Salesforce CPQ?
- Importance of CPQ in Business
- Overview of Quote-to-Cash (QTC) Process
- Understanding CPQ Architecture
- CPQ vs. Standard Salesforce Pricing

Module 2: Salesforce Admin Essentials for CPQ

- Salesforce Object Model Overview
- Custom vs. Standard Objects
- Relationships (Lookup, Master-Detail, Junction Objects)
- Validation Rules & Formula Fields
- Workflow Rules & Process Builder
- Approval Processes
- Reports & Dashboards for Sales Teams

Module 3: Sales Cloud Overview for CPQ

- Lead & Opportunity Management
- Products, Price Books & Quotes
- Contract & Order Management
- Forecasting & Revenue Recognition

Module 4: CPQ Package Installation & Configuration

- Installing & Configuring CPQ Package
- Navigating CPQ App & Tabs
- Configuring CPQ Users and Permissions
- Understanding CPQ Data Model

Module 5: Product Configuration in CPQ

- Setting Up Products & Price Books
- Creating Standalone & Bundle Products
- Product Rules: Validation, Selection, and Alert Rules
- Product Options & Features
- Dynamic Bundles & Nested Bundles
- Guided Selling Configuration

Module 6: CPQ Pricing Methods & Rules

- CPQ Pricing Methods: List, Cost, Block & Tiered Pricing
- Discount Schedules & Volume Discounts

- Price Rules: Automating Pricing Adjustments
- Contracted Pricing & Special Pricing Scenarios
- Proration & Subscription Pricing

Module 7: Quote Configuration & Customization

- Quote Templates & Customization
- Quote Line Editor Overview
- Multi-Dimensional Quoting (MDQ)
- Grouping & Sorting Quote Lines
- Quote Calculations & Quote Line Fields

Module 8: Approval Processes in CPQ

- CPQ Advanced Approvals
- Setting Up Approval Workflows
- Automated Approvals with Conditions
- CPQ Document Generation & Output Document Templates

Module 9: Contract & Order Management

- Amendments & Renewals in CPQ
- Generating Orders from Quotes
- Contract Lifecycle Management
- Subscription Management
- Co-Termination & Amendments

Module 10: Integrations & Performance Optimization

- Integrating CPQ with Salesforce Billing
- CPQ & ERP Integration
- Best Practices for CPQ Implementation
- CPQ Performance Optimization Tips
- Debugging & Troubleshooting CPQ Issues

Module 11: Career Readiness & Placement Support

- CPQ Certification Preparation & Exam Tips
 - CPQ Interview Questions & Answers
 - Resume Building for CPQ Roles
 - Real-world Projects & Case Studies
 - 100% Placement Support & Career Guidance
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Duration: 4-6 Weeks

Mode: Online/Live Instructor-led Sessions

Certification: CPQ Certification Guidance Provided

**Join GradX Academy's Salesforce CPQ Course to Master CPQ
Implementation & Boost Your Career!**