Salesforce CPQ Course Curriculum

Introduction

Package Setting & Products
- Update Package Settings
- Update Product Fields

Creating Quote
- Creating an Account, Contact, Opportunity and Quote

Configuration
- Product Bundle Settings
- Create Features for a Bundle
- Create Product Options for a Bundle
- Create Option Constraints for a Bundle
- Create Configuration Attributes for a Bundle

Product Rules
- Create Product Rule
- Create Selection Product Rules Lookup Queries
- Create Validation Product Rule
- Configuration Attribute
- Create Lookup Queries
- Create a Dynamic Bundle (Using Filter)

Custom Actions
- Create Custom Action

Guided Selling
- Guided Selling

Pricing
- Pricing Methods
- Pricing Waterfall
- Manual Discounting
- Create a Discount Schedule
- Contracted Pricing
- Subscription Pricing
- Multi-Dimensional Quoting

Pricing Rules
- Create Price Rules
- Create Price Rules using Lookup Queries

Contracting
- Create a Contract and Renewal Opportunity
- Amend a Contract
- Create a Renewal Quote

Quote Templates
- Quote Template Basics
- Custom Quote Template
- Conditional Discount Column
- Assemble Custom Document
- Conditional Cover Page
- Conditional Line-Item Tables
- Quote term sections
- Quote term with Merge fields

KEY FEATURES

- Instructor-led Sessions
- Learn from Experts
- Assignments
- 24 x 7 Support
- Real-time Case Studies
- Get Certified

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