

SAP CPQ Administration

Learn via: **Classroom / Virtual Classroom / Online**

Duration: **4 Days**

Overview

In this {*training}, you will gain a comprehensive understanding of SAP CPQ and its functionalities and learn how to set up and administer the solution to best meet your organization's needs. Through instructor-led demonstrations and hands-on exercises, you will learn how to:

- configure products and services
- set up pricing and promotions
- generate accurate quotes
- create quality custom proposals
- perform administration tasks, such as creating users, markets, rules, and workflows

Prerequisites

Essential

- CPQ Foundations eLearning Course

Who Should Attend

- System Administrators
- Program/Project Managers
- Technology Consultants
- Application Consultants
- Functional Consultants

What You Will Learn

This {*training} will prepare you to:

- Manage CPQ integrations, releases, and environments
- Navigate the CPQ user interface
- Set up companies, user types, and users
- Configure products, attributes, and nesting structures
- Set up pricing, markets, and promotions
- Configure product and pricing rules
- Write basic formulas using Formula Builder and CTX tags
- Design custom tables and attribute containers
- Generate quote documents
- Develop document templates
- Configure workflows and approvals

Outline

Introduction to CPQ

- Discussing the uses of CPQ
- Discussing integration capability with CPQ
- Discussing the benefits of using CPQ

CPQ Overview

- Explaining the CPQ catalog and its features
- Configuring products in CPQ
- Creating quotes
- Providing customer billing and shipping information
- Generating documents and sending the quote to the customer
- Accessing and using the various application parameters

Users and User Types

- Creating a new company profile
- Creating a new user type
- Manually creating a new user
- Creating new users using the import method

Categories and Simple Products

- Creating a new category
- Creating a sub-category
- Manually adding a new simple product to the product catalog
- Importing multiple simple products using an Excel spreadsheet

Attributes

- Describing the purpose and function of an attribute
- Defining the different attribute components
- Manually adding and configuring new attributes
- Importing attributes

Configurable Products

- Describing a configurable product
- Manually adding configurable products
- Adding attributes to configurable products
- Editing and adding attribute values
- Configuring product layouts

Markets and Currencies

- Adding different currencies
- Converting currencies
- Defining different markets
- Using market definitions

Pricing and Pricebooks

- Inserting and modifying pricing for products and attributes
- Creating and configuring pricebooks
- Describing how visibility conditions are related to pricebooks
- Discussing pricebook hierarchies

Discounts and Multipliers

- Creating discounts
- Setting discount priorities
- Creating multipliers

Special Pricing and Promotions

- Creating a new discount promotion
- Creating a free product promotion

Guided Selling

- Creating a guided search
- Using guided selling to find products

Formulas and Formula Builder

- Using Formula Builder and expressions
- Selecting the appropriate values when building expressions

Configuration Rules and Attribute Dependencies

- Configuring rules using Formula Builder
- Creating an attribute dependency rule

Triggers

- Explaining the purpose of triggers
- Describing the three types of triggers
- Adding a trigger

Custom Tables

- Creating a new custom table by defining table and column names
- Creating a new table by importing an excel file
- Adding new columns to an existing table
- Deleting an existing table
- Exporting an empty excel file with column names so data records can be added and imported
- Exporting an entire table
- Reading through table entries, delete, insert new and modify existing

CTX Tags

- Creating new approval rules
- Submitting quotes for approval

Attribute Containers

- Creating products with attributes containers
- Defining attributes
- Defining attribute container columns
- Testing the attribute container configuration

Product Nesting

- Creating product nesting using simple products
- Creating product nesting using configurable products

Quote Elements

- Creating quote tabs
- Creating new custom quote fields
- Choosing custom field permissions and quote item custom fields

Document Templates

- Creating new document templates and section templates
- Generating quote documents
- Creating multi-section templates

Approvals, Workflows, and Notifications

- Explaining the approval process
- Adding a new approval rule
- Defining workflow statuses and actions
- Modifying workflow permissions
- Creating and using approval rules
- Sending notifications

Deploy/Send Changes

- Understanding the Deploy/Send Changes feature
- Ensuring the environment connections are properly configured
- Creating a deployment package