



**CPQ**  
by CallidusCloud

# **CallidusCloud CPQ Basic Admin Training**



Designed for CPQ Administrators and Sales / Marketing professionals, **the Basic Admin Training** course provides the necessary skills for setting up and customizing CallidusCloud CPQ for end users. Each of these topics involve hands on labs and lectures designed to fully create a CallidusCloud CPQ installation by using one of the most common and recognizable products, the Desktop PC. After successfully modeling this product, which resides in a traditional catalog format, you will be able to setup your own products and services in CPQ.

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#### Who Should Attend

CallidusCloud CPQ administrators, sales and marketing professionals, or product management

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#### Expectations

How to apply best practice modeling principles, complete configuration and data management tasks, model the sales process and generate configured quotes using the web-based CPQ Admin interface. How to apply this knowledge to launch, guide, configure, maintain, and maximize your company's use of CallidusCloud CPQ.

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#### Requirements

Students: Individual laptops or personal computers with Internet access  
Instructor: A wireless or LAN connection and a VGA or DVI projector

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## DAY 1

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### Introduction

- A. Class introductions (instructor, students)
- B. Configuration Concepts
- C. Project Timeline
- D. Handouts, i.e., Labs, Log In ID's
- E. Review of Agenda, Training, Product Catalog

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### LAB 1

#### Getting Started - Demo

- A. Logging In – [www.webcomuniversity.com](http://www.webcomuniversity.com)
- B. End User Functionality – Overview
- C. Set Up and Administration – Overview

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### LAB 2

#### Workbook

- A. Gathering Product Data
- B. Populating Workbooks

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### LAB 3

#### Categories and Products

- A. Defining Structure
- B. On-line Catalog – Defining Categories and Products

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### LAB 4

#### Products

- A. Create Simple Product
- B. Copy Product
- C. Create Configurable Product
- D. Managing and Modifying Products

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### LAB 5

#### Users

- A. Define User Groups
  - B. Set up Users
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## DAY 2

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### Review of Day 1

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#### LAB 6 Pricing

- A. Creating and Uploading Pricebooks
  - B. Define and Configure Custom Tables
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#### LAB 7 Introduction to Tag Usage

- A. Code Builder / Syntax Checker
  - B. Dynamic Part Number
  - C. Dynamic Descriptions
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#### LAB 8 Data Management

- A. Mass Import/Export Simple Product
  - B. Bulk Import/Export Attributes
  - C. Bulk Import/Export Users
  - D. Bulk Import/Export Customers
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#### LAB 9 Configuration Rules

- A. Creating Attribute Dependencies
  - B. Selecting Attributes based on Attribute Values
  - C. Using Code Builder to create Rules
  - D. Hidden Attributes and Calculations
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## DAY 3

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### Review of Day 2

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#### LAB 10 Messages

- A. Creating and Managing Messages
  - B. Messages in the Configurator
  - C. Messages in the Responder
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#### LAB 11 Discounts and Markets

- A. Discounting Rules
  - B. Currencies
  - C. Markets
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#### LAB 12 Workflow

- A. Status Definitions
  - B. Define Workflow
  - C. Notifications
  - D. Approval Rules
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#### LAB 13 Document Generation

- A. Managing Quotation Templates
  - B. Defining New Template
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## DAY 4

<b>Review of Day 3</b>	
<b>Lab 14</b> Attribute Type Container	A. Attribute Type Container
<b>LAB 15</b> Design Product Details Page	A. Review Product Details Page B. Create New Product Details Page
<b>LAB 16</b> Attributes Based Search	A. Review Attributes Based Search B. Create New Attribute Based Search
<b>Lab 17</b> Special Pricing & Promotions	A. Special Pricing & Promotions
<b>CRM Setup</b>	A. Review Process B. Related Quotes Setup B. Customer Roles Mapping C. Custom Fields Mapping
<b>User Interface (UI)</b>	A. Customer Category User Interface B. Styles and Images C. Product Configuration Templates
<b>WorkFlow</b>	A. Introduce WorkFlow B. Creating a Case
<b>Client Specific Product Modeling Review</b>	A. Discussion B.
<b>Advanced Concepts Review</b>	A. Collection of Configurable Products B. Configurable Systems C. Product Alias D. Help me choose link (pop-up)
<b>Conclusion</b>	A. Review B. Questions and Answers C. Training Feedback Forms – email to: RateMyTraining@calliduscloud.com