



Certification Exam Guide

# SALESFORCE CERTIFIED CPQ SPECIALIST

Spring '17



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## **ABOUT THE SALESFORCE CERTIFIED CPQ SPECIALIST CREDENTIAL**

The Certified Salesforce CPQ Specialist credential is designed for individuals who have experience implementing the Salesforce CPQ solution. This credential is targeted toward the Salesforce Customers, Partners, and Salesforce employees who want to demonstrate their skills and knowledge in designing, building, and implementing quoting flows through the Salesforce CPQ platform. Once credentialed, Salesforce Certified CPQ Specialists will have demonstrated their ability to build bundle configurations, pricing, output documents and renewals and amendments.

## SECTION 1. PURPOSE OF THIS EXAM GUIDE

This Exam Guide is designed to help candidates evaluate their readiness to pass the Salesforce Certified CPQ Specialist exam. This guide provides information about the target audience for the certification exam, recommended training and documentation, and a complete list of exam objectives; all with the intent of helping candidates achieve a passing score. Salesforce highly recommends a combination of on-the-job experience, and self-study to maximize the likelihood of passing the exam.

## SECTION 2. AUDIENCE DESCRIPTION: SALESFORCE CERTIFIED CPQ SPECIALIST

The Salesforce Certified CPQ Specialist has experience with the Salesforce CPQ platform, CPQ terminology, and is also able to troubleshoot and solve basic platform issues.

The Salesforce Certified CPQ Specialist generally has six to twelve months of experience in a CPQ Specialist role. The Salesforce Certified CPQ Specialist candidate has experience with the Salesforce CPQ solution, and has the skills and knowledge of the following concepts:

- Can build solutions to support business process
- Can troubleshoot and solve basic platform issues
- Can configure bundles (features, options, option constraints, configuration attributes), product rules, price rules, discount schedules, block pricing, cost, contracted prices, quote templates, quote processes, custom actions
- Can generate renewal and amendment quotes
- Can troubleshoot and solve basic product rules and pricing issues
- Can write formula expressions for price rules
- Can utilize the contracting process
- Can manage products, pricebooks and pricebook entries
- Can define the business sales process
- Configure user permissions, record types and page layouts
- Is familiar with approvals
- Has knowledge of CPQ object data model, CPQ package level settings and price waterfall

A candidate for this exam will likely need assistance with:

- Composite summary variables
- Block with discount schedule
- Nested bundles
- Nested quote terms
- Advanced grouping
- Advanced quote template topics

A candidate for this exam is not expected to know how to do the following:

- CPQ plug-ins
- Custom Template Content

## SALESFORCE CERTIFIED CPQ SPECIALIST

- Target URL in custom actions
- Integration to third party web apps
- Billing
- Migration and Legacy Data Handling
- Administer force.com, VisualForce pages, APEX classes, or JavaScript

Typical job roles a Salesforce Certified CPQ Specialist candidate may have include:

- IT
- Sales Ops
- Technical Architect
- Implementation Consultant
- Services

## SECTION 3. ABOUT THE EXAM

The Salesforce Certified CPQ Specialist exam has the following characteristics:

- Content: 60 multiple-choice/multiple-select questions
- Time allotted to complete the exam: 90 minutes
- Passing Score: 68%
- Registration fee: USD 200; Retake fee: USD 100
- Delivery options: Proctored exam delivered onsite at a testing center or in an online proctored environment. Click [here](#) for information in scheduling an exam.
- References: No hard-copy or online materials may be referenced during the exam.
- Prerequisite: None required; course attendance highly recommended.

## SECTION 4. RECOMMENDED TRAINING AND REFERENCES

As preparation for this exam, Salesforce University recommends a combination of: hands-on experience, training course completion, Trailhead trails, and self-study in the areas listed in the Exam Outline section of this exam guide.

To enroll in instructor-led courses and launch online training from your Salesforce application, click the **Help & Training** link in the upper right corner of the screen (requires login) and search for the desired courses. Non-Salesforce customers can register for instructor-led courses [here](#).

Instructor Led Training recommended for this exam:

[Salesforce CPQ Admin Essentials for New Administrators \(CPO-201\)](#)

[Salesforce CPQ Admin Essentials for Experienced Administrators \(CPO-211\)](#)

To review online Documentation, Tip Sheets, and User Guides – search for the topics listed in the Exam Outline section of the exam guide and study the information related to those topics. Documentation, Tip Sheets, and User Guides can also be accessed through **Help & Training**.

Trailhead trails can be accessed [here](#).

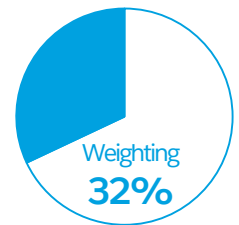


## SECTION 5. EXAM OUTLINE

The Salesforce Certified CPQ Specialist exam measures a candidate's knowledge and skills related to the following objectives. A candidate should have hands-on experience with CPQ and demonstrate the knowledge and expertise in each of the areas below.

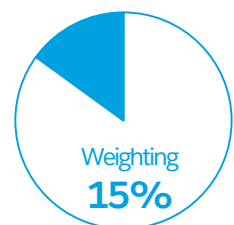
### PRODUCTS AND BUNDLES

- Given a customer product catalog, set up the appropriate product bundle to meet customer needs.
- Given a customer product catalog, set up option constraints that ensures a technically viable configuration of the bundle.
- Given a customer's business logic, create applicable product rules that ensures a technically viable configuration of a bundle.
- Given a customer product catalog, identify configuration attributes that can manipulate options while ensuring a technically valid configuration.
- Given a customer product catalog, recommend the appropriate type of product bundle that meets customer needs.
- Given a customer requirement, setup products to dynamically generate product code and description.
- Given details about a customer's business, set up all necessary assets or subscription products.
- Given a customer's selling process, configure guided selling to suggest applicable products.
- Given a customer requirement, identify and setup applicable search filters to narrow large product catalogs.



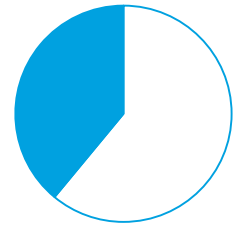
### QUOTE TEMPLATES

- Given desired output requirements, create an accurate quote template based on design specifications and business rules determined by the customer.
- Given an unexpected result in the rendering of the document output, identify investigation paths to resolve issues.
- Given desired output requirements, set up appropriate quote terms and template sections to accurately produce terms in a generated document.
- Given desired output requirements, set up template sections to accurately produce in a generated document.
- Given desired output requirements, set up line item sections and Line Columns to accurately produce the items in a generated document.



## PRICING AND DISCOUNTS

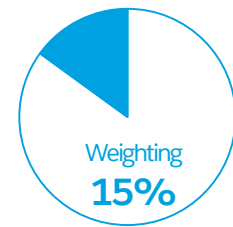
- Given a customer's pricing model for a product, determine the appropriate pricing method.
- Given a price waterfall, set up price rules that will meet customer needs.
- Given a customer's tiered pricing model, determine the appropriate characteristics of volume-based or term-based discount schedules.
- Given a customer's products, ramping, and escalator requirements, create appropriate price dimensions.
- Given unexpected calculated prices, determine investigation paths that will produce accurate pricing.
- Given a customer-specific pricing requirement, configure correct contracted prices.



Weighting  
**39%**

## CPQ PLATFORM

- Given an unexpected result in the CPQ data flow, determine investigations paths that will resolve the issue.
- Given a set of business requirements, adjust the User Interface to display the appropriate data.
- Given a set of business requirements, adjust permissions to ensure appropriate data security.
- Given a finalized quote, accurately predict the outcome of the contracting process.
- Given an unexpected result in the amendment / renewal data flow, determine investigations paths that will resolve the issue.
- Given a set of translated values, use the appropriate localization mechanism to ensure translated user interfaces and outputs.



Weighting  
**15%**

## SECTION 6. SAMPLE EXAM QUESTIONS

The following questions are representative of those on the Salesforce Certified CPQ Specialist exam. These questions are *not* designed to test your readiness to successfully complete the certification exam, but should be used to become familiar with the types of questions on the exam. The actual exam questions may be more or less difficult than this set of questions.

1. Universal Containers has these conditions, that when met, an additional discount of 15% will be automatically added to the overall quote.

1. Revenue Account on the quote object is set as "Interest Revenue".
2. Product A has been added to the quote line.
3. User Count on the account is greater than 25.

According to the business requirements, either the Revenue Account is set to "Interest Revenue" or both Product A needs to exist on the quote line and the User Count needs to be greater than 25 in order for the additional discount to be applied.

How can the CPQ Admin set this up in advanced conditions on a price rule to reflect this requirement?

*Choose one answer*

- A. 1 OR (2 AND 3)
- B. (1 AND 2) OR 3
- C. 1 AND 2 OR 3
- D. (1 AND 3) OR 2

2. Universal Containers sells a subscription Product Z that is sold in yearly segments, but would like to prevent the User from discounting the first segment.

How should the CPQ Admin ensure the User will not be able to discount the first segment?

*Choose one answer*

- A. Write a Price Rule to run when Product Code = Product Z and Segment Index = 1, with a Price Action setting Non Discountable to True.
- B. Set First Segment Term Editable to Only Custom Segments in the yearly Price Dimension record.
- C. Create two Price Dimensions, then set Non Discountable to False on the first Price Dimension.
- D. Write a Price Rule to inject 0 into Additional Discount when Product Code = Product Z and Initial Segment = True.

## SECTION 7. ANSWERS TO SAMPLE EXAM QUESTIONS

1. A
2. A

## SECTION 8. MAINTAINING A CERTIFICATION

One of the benefits of holding a Salesforce credential is always being up to date on new product releases. Our release exams are designed to ensure you have the latest information you need to be a successful Salesforce Certified expert.

Click [here](#) for information regarding requirements and cost to maintain your Salesforce certification.

If you earned the Salesforce Certified CPQ Specialist credential before July 17, 2017 you are required to pass the Salesforce Certified CPQ Specialist – Summer '17 Release Exam launching July 17, 2017. Additional details about the release exam objectives, number of questions, recommended preparation, and registration information will be sent via email when the exam launches and available through our [FAQs](#) on our website.

### ABOUT SALESFORCE UNIVERSITY

Salesforce University offers a comprehensive catalog of courses and certifications to help you administer, develop, and use your organization's Salesforce environment. Whether you need a customized private course for your whole team or an in-depth instructor-led classroom experience for one person, Salesforce University can help you take the next steps on your journey to success. Contact us today to learn how we can help you get the most out of your Salesforce investment.

### REGISTER FOR SALESFORCE UNIVERSITY COURSES ONLINE OR SPEAK WITH AN EXPERT:



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