Salesforce CPQ

Many businesses are still building quotes with the same tools that were considered cutting edge in the 1990s, including word processing software and spreadsheets. While they may be familiar and convenient, they are unreliable and leave organizations susceptible to revenue loss.

The Salesforce platform offers a better way. Configure, Price, Quote apps, often referred to as CPQ, have become vital for fast-growing businesses. They represent a critical issue that many face: how to produce accurate and professional quotes quickly, while eliminating errors and inefficiencies.

Capture All the Data & Focus on Success
Salesforce CPQ automates the quote to cash process. This means capturing important information like what exactly was quoted and at what price. CPQ can help sellers make the right product decisions with configuration rules and pre-determined product bundles, and even suggest related products to offer. Automated approval processes make discounting decisions fast and easy. From new quotes to re-orders, everything is kept in one place to maintain that critical 360-degree view of the customer.

Quickstart – CPQ Quote to Cash
CGI offers a Quickstart program over 6 weeks that can be added to any Salesforce implementation. The Quickstart scope includes;

1. Up to two Price Rules
2. Configuration of up to twelve Product bundles
3. Up to three Product Rules
4. Salesforce Quote to Cash setup
5. Create and load Product Catalog
6. Create one Price Book
7. Up to three levels of quote Approvals
8. Up to four Standard Workflow Rules or Process Builder equivalents
9. One English template with optional sections
10. One Dashboard and up to ten reports (optional)