

Quote PDF Generator & Last Mile Delivery Tracker

The Speed to Win: *Quote to Delivery in Hours, not day!*

Presented By,

Salesforce Practice:

Sandeep

Praveena

Srija

Yogitha

Agenda

- Quote PDF Generator and Last Mile Delivery Tracker
- Business Challenge & Solution
- Business Process Flow
- Demo
- Key Use cases with Solution Components
- Benefits with Praval value add
- Appendix

Quote PDF Generator & Last Mile Delivery Tracker

Problem Statement: A growing supplier of electronic consumer products was losing deals due to a slow, 2–3 days manual quoting process. Relying on spreadsheets led to pricing errors, and a poor customer experience. The company aimed to cut the quote-to-order cycle in half and provide the real-time delivery transparency that customers expect.

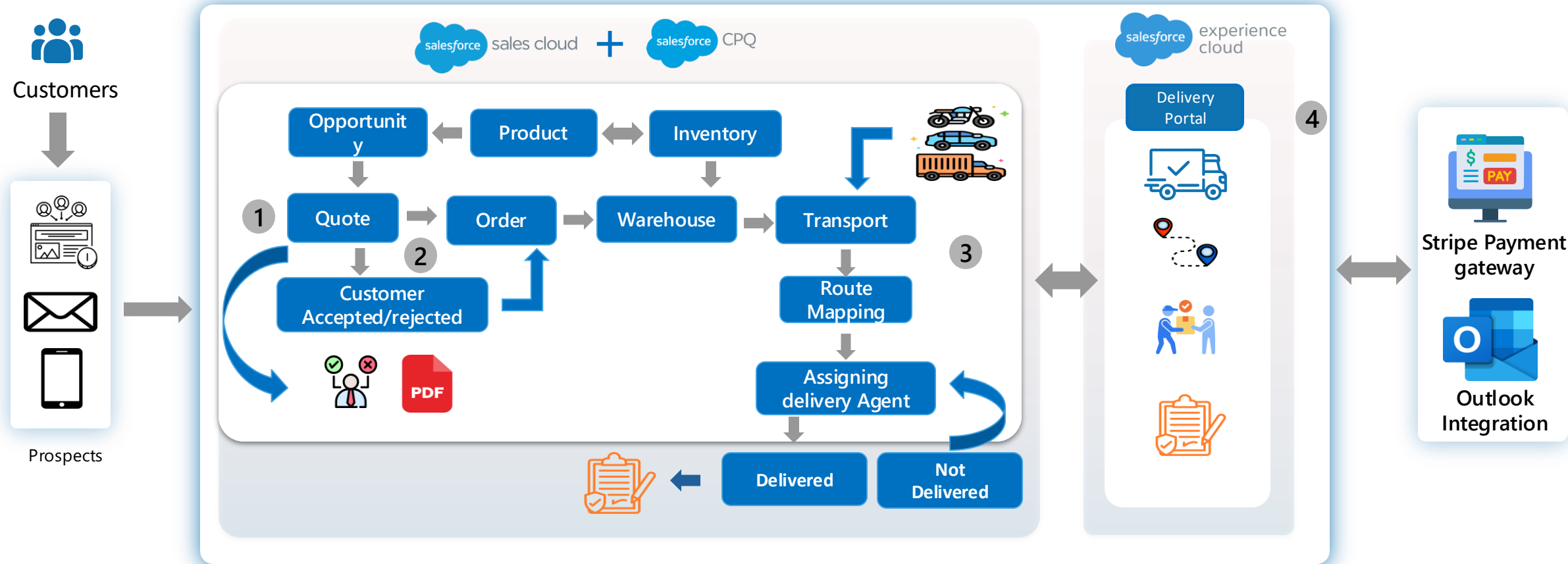
Solution: Implemented a unified Quote-to-Delivery platform that automated the entire sales and logistics cycle, from initial quote to final delivery. This streamlined process reduced the quote-to-order cycle by 50%, cut costly errors by 40%, and increased customer satisfaction by 35%. Sales reps can now generate accurate quotes in minutes with Intelligent transport assignment, elevating the entire customer experience.

Average 350 +
Orders /
Month



Business Process Flow – Quote PDF Generator & Last Mile Delivery Tracker

- **Opportunity to Quote creation & Product addition:** Reduced from 1–2 Days to 30–60 Minutes
- **Approval Process & Quote PDF generation:** Reduced from 2–3 Days to 1–2 Hours
- **Proposal to customer & Order Confirmation:** Reduced from 3–5 Days to Same Day
- **Inventory update & last mile delivery tracking:** Reduced from 7–10 Days to 1–3 Days



Key Use cases

Quote-to-Delivery Accelerator: End-to-End Flow

- 1 Quote Generation & Approval** : Create branded quotes in minutes with CPQ, with built-in approvals and version control.
- 2 Quote-to-Order Conversion** : Approved quotes seamlessly convert into Salesforce Orders with all details auto-populated.
- 3 Warehouse Fulfillment & Stock Reservation** : Orders trigger warehouse assignment and real-time stock reservation for accurate fulfillment.
- 4 Order Delivery Optimization & Transport** : Optimize delivery plans with Maps, assign vehicles, and update transport details.
- 5 Route Creation & Agent Assignment** : Routes auto-generate with sequenced stops, assigned to transport and delivery agents with instant notifications.
- 6 Delivery Execution & Proof of Delivery** : Agents update delivery status via mobile and capture proof through e-signatures or photos.
- 7 Performance Dashboards & Analytics** : Real-time dashboards track quote-to-order cycle, inventory, top-selling products, and delivery KPIs.

DEMO

Solution Components

Automated Quote Generation

CPQ-driven quote creation with guided selling ensures accurate pricing, consistent branding, and faster approvals. Eliminates manual errors and reduces quote turnaround time.

Real-Time Inventory Validation

Seamless integration with inventory systems validates stock availability before order confirmation, preventing delivery delays and improving order accuracy.

Intelligent Transport Assignment

Automated transport allocation engine matches orders with the best-fit transporter based on location, availability, and capacity removing manual effort delays.

Delivery Tracking & Analytics

Mobile-enabled tracking provides delivery agents with real-time delivery visibility. Performance dashboards give managers insights into quote cycles, delivery timelines, and transporter efficiency.

Praval Value add:

Business Benefit	Out of the box	Praval value add
50% reduction in quote creation time	Salesforce CPQ offers template-based quote generation and branded PDF export.	Integrated automation using Flow with pre-populated fields reduces quote generation time from days to under 60 minutes , ensuring quotes are created with minimal clicks. 1
Up to 90% improvement in accuracy by eliminating manual errors	Standard CPQ configurations reduce pricing/config errors but still rely on manual population.	Auto-filled fields via field mapping from CRM eliminate manual entry, reducing errors and improving overall data integrity. 2
End-to-end automation from quote approval to delivery	Order is created from approved Quote; inventory tracked manually	Automated Order Activation, region-based Warehouse Inventory Management, and Intelligent Vehicle Assignment speed fulfilment, cutting the total order-to-delivery cycle from 10 days to under 3 days. 3
Enhanced customer experience and reduced delays	Limited visibility into delivery progress; no dedicated agent interface	Delivery Agent Portal and live updates to customers enable real-time tracking , resulting in a 35% increase in customer satisfaction and fewer support calls. 4

Future deployment planning

Product Name	Functionality
Einstein recommendation	AI-powered recommendations for optimal pricing, discounting & product bundling to improve upselling and cross-selling.
Agent force	AI agents to automate repetitive logistics tasks like transporter allocation, route scheduling, and order update to free up human effort.
Service Cloud	This is to create and resolve cases for delivered orders requiring returns or replacements.

Our Customers



Thank you!

APPENDIX