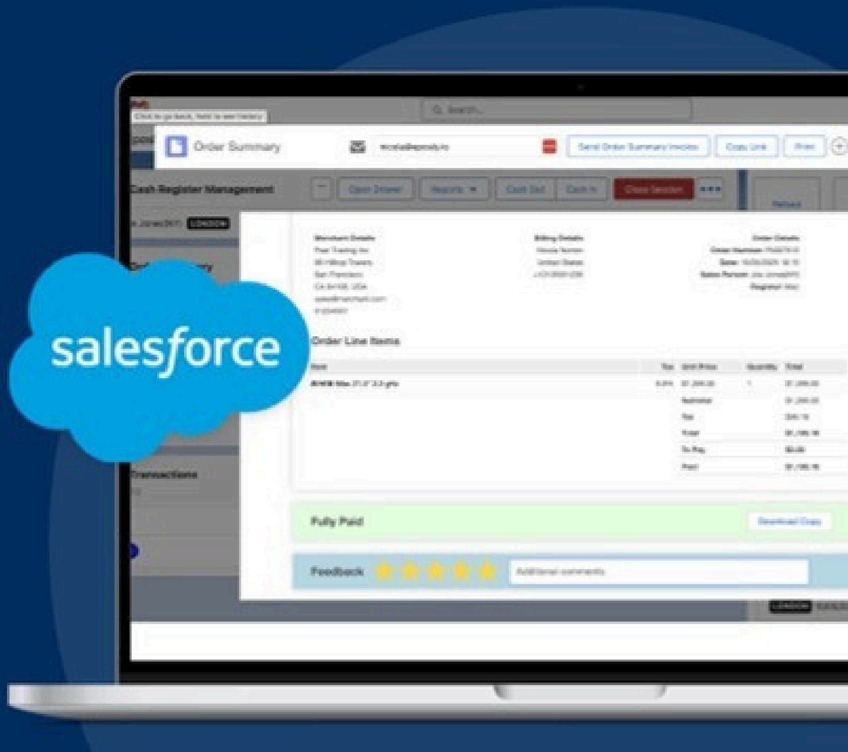
eposly

AN ASCENDX COMPANY

After CPQ

A Smarter Way to Handle Salesforce Transactions

A guide for teams rethinking how they sell, quote and collect, without overbuilding or overspending

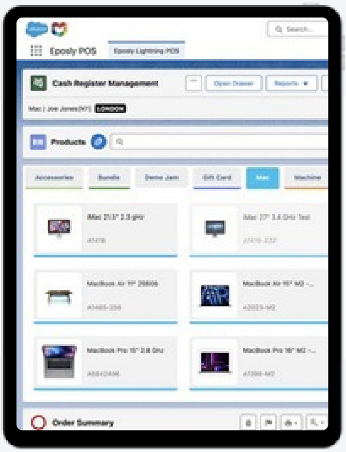


Introduction:
Salesforce is sunsetting CPQ. What are the options?

Salesforce CPQ is now entering its end-of-life. That means no new licenses will be issued for net-new customers, and support for existing users will eventually taper off.

In its place, the company has introduced Revenue Cloud, its next-generation quote-to-cash platform. Revenue Cloud is bigger and even more feature-rich than Salesforce CPQ ever was, and is designed to cover the entire revenue lifecycle, from product configuration all the way to billing, renewals, and compliance.

This makes it powerful for large enterprises with complex pricing, long-term subscriptions, or highly regulated billing needs. But for teams with leaner sales cycles (and who already struggle to justify CPQ), that can mean paying for much more than they will ever use, with the same risk of long implementations and unnecessary admin costs.



The bottom line

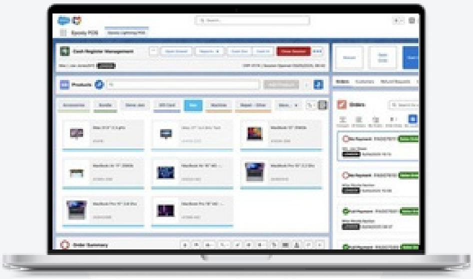
Not every business needs the biggest, most complex tool. If your deals are truly large, complicated, and need a deep quoting engine, CPQ systems are still the best fit.

But if your sales process lives somewhere in the middle, where you want lean, accurate quoting and real-time payment flows, without getting buried in rules engines and deferred invoices, there's a better option.

1: The problem with extremes

Have you ever needed more than a checkout but less than a quote? If you run your business on Salesforce, you know exactly how this feels.

Salesforce is your single source of truth for every contact, opportunity, transaction history, and customer service record. But when it comes time to take a payment or handle a real-world transaction, you'll find yourself torn between two extremes.



On one end, you have traditional **point-of-sale (POS)** systems. These are great for quick, simple transactions. But they often don't integrate with Salesforce, don't care about the customer, and struggle to handle more complex transactions.

On the other end, you have **CPQ (Configure, Price, Quote)** tools, including Salesforce CPQ (now at its end of life) and Revenue Cloud (Salesforce's new quote-to-cash platform). These are designed for complex B2B deals, but for everyday transactions, they're overkill.

But what happens when you need real-time payments and inventory visibility, but you don't need enterprise-level quoting logic?

Most businesses don't live at either extreme. Between "someone walks in, pays for a pair of shoes, and leaves" and "a 500-line B2B deal that needs five approvals and custom pricing", most businesses' sales cycles sit somewhere in the middle.

Eposly bridges the gap between traditional POS and full CPQ stacks. Fully Salesforce-native, it enables real-time payments, controlled pricing, product workflows, and deep CRM integration, without the drag of an enterprise CPQ deployment or the isolation of a standalone POS.

In this guide, you'll learn to recognise when you really need POS, when CPQ is worth it, and when your business might be better served by something smarter in the middle.

2: Where POS, CPQ and Eposly sit on the transaction spectrum

It helps to think of the transactions landscape as a spectrum, with simple checkouts on one end and complex, multi-layer quoting on the other.

Let's break down where POS, CPQ and Eposly all sit on this spectrum, and which are best suited for specific use cases, users and transaction complexities.

Traditional POS: Simple, fast, standalone

On one end of the spectrum, you have traditional point-of-sale tools. These exist to handle quick, simple and often in-person transactions.

Industry use cases: Consumer goods, healthcare, automotive service counters, government permit offices, or any walk-in scenario where speed and simplicity matter most.

Typical users: Frontline staff supporting immediate or in-person transactions.

Ease of use: Easy to use for frontline staff.

Transaction complexity: Low complexity purchases with standard products, basic pricing, and fast scan-and-pay checkout.

Payment: Instant. Payment and fulfilment happen instantly.

Customer context: Customer is often anonymous. Many customers walk in and never get tied to a formal account.

Inventory fulfilment: Tight local inventory updates and real-time stock adjustments.

Hardware and payments: Hardware-friendly by design, with barcode scanners, tap-to-pay, card readers, cash drawers and receipt printers.

Salesforce native: Typically standalone and siloed.

CPQ: Complex, configured, controlled

At the other end of the spectrum, CPQ systems exist to handle large and complex deals.

Industry use cases: Manufacturing, telecom, SaaS, life sciences, and any industry with multi-product configurations and negotiated, contract-based pricing.

Typical users: Sales reps, account executives, and deal teams who negotiate multi-product, complex B2B sales.

Ease of use: Often complex, with rules engines, approvals and multi-step configurations. This requires significant set-up, configuration and training.

Transaction complexity: High complexity. Configured products, custom pricing, quote generation, contract-specific terms, and multi-level approvals.

Payment: Deferred. Deals span days or weeks, as payment is made after the quote, negotiation, approval, and invoice.

Customer context: Always known. Each customer has a formal account, with terms, credit checks, and invoicing.

Inventory fulfilment: Focus is more on contracts and multi-product configurations. Less emphasis on real-time local stock.

Hardware and payments: Not built for in-person payments. No hardware or PCI tools included.

Salesforce native: Deep Salesforce or Revenue Cloud connection.

Eposly: The missing middle

Most businesses do not fit neatly into POS or CPQ alone. Many need real-time payments, simple product configurations, flexible pricing, and tight integration with Salesforce without the complexity of a full CPQ deployment. That's where Eposly comes in.

Industry use cases: Automotive, education, communications, energy, utilities, healthcare, life sciences, government, and others.

Typical users: Hybrid teams that include field agents, branch staff, account managers, or front-desk teams who handle transactions tied to known customers, often blending in-person payments with account-level pricing logic.

Ease of use: Balances ease of use with flexibility. Intuitive enough for field reps, front-desk staff, or branch teams to handle payments and basic quoting, but powerful enough for account managers to apply customer-specific pricing and workflows.

Transaction complexity: Moderate complexity. Basic product configurations, customer-specific pricing, negotiated discounts, tiered or bundled pricing, but without the overhead of a massive CPQ rules engine.

Payment: Supports both immediate payment and deferred cycles.

Customer context: Always known. Every payment or transaction ties directly to a customer account in Salesforce, updating balances, entitlements, or history in real time.

Inventory fulfilment: Real-time inventory tracking and automatic fulfilment updates tied to the CRM.

Hardware and payments: Supports real-time payments and integrates with top-tier payment providers. Includes receipt printing, cash drawer management, and session tracking.

Salesforce native: 100% Salesforce-native. Every transaction, payment, quote, or inventory update is immediately synced with your core records.

3: The Limitations of traditional POS systems

Traditional point-of-sale (POS) systems are built to do one thing very well: handle fast, simple transactions.

For many industries, this is exactly what they need. Retail, consumer goods, healthcare front desks, automotive parts counters, and even government offices rely on POS systems to move customers through the checkout quickly and efficiently.

A well-designed POS system:

- Is extremely user-friendly and easy to learn, even for frontline staff with minimal training
- Handles barcode scanning, secure payments, receipts, and tax calculations without fuss
- Manages real-time stock deductions, so local inventory stays accurate
- Supports integrated hardware like receipt printers, cash drawers, card readers, and barcode scanners
- Can be set up quickly for simple SKUs and standard pricing

For high-volume, low-complexity environments, this simplicity is a big advantage. Customers pay, the system updates inventory, and the transaction is done.

Where POS tools start to struggle

Many businesses today operate in a space where they need more than just a basic checkout.

And that's where traditional POS systems fall short. They simply can't handle:

- Customisable products or multi-step order flows
- Flexible pricing structures with discounts or negotiated terms
- Integrated approval workflows
- Real-time updates to their CRM

As a result, businesses that rely on standalone POS often struggle to handle transactions that go beyond a simple scan-and-pay model.

The CRM gap

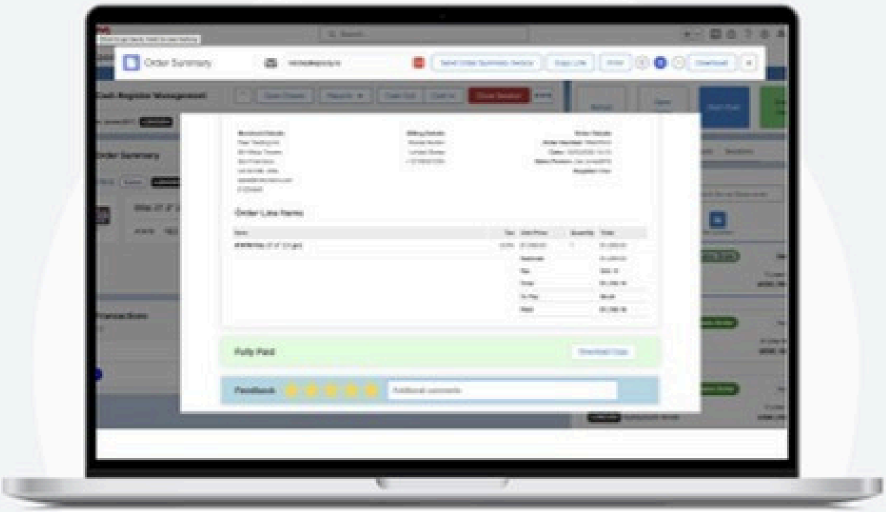
One of the biggest limitations of POS systems is how disconnected they are from Salesforce.

By design, traditional POS systems work standalone. They keep customer and transaction data locked in the POS itself (or worse, they simply don't capture any data about the customer at all). Meanwhile, your CRM holds your broader customer history and data, and your marketing automation lives somewhere else.

Customer purchase data doesn't flow into Salesforce in real time. And that creates gaps across your organisation. Reporting is manual and error-prone, customer support teams lack context to provide adequate support and teams miss opportunities for upselling, cross-selling and retention.

The bottom line

Traditional POS systems work excellently for fast, simple, in-person transactions. But if you need more than a basic checkout, a traditional POS doesn't quite give you what you need.



4: When CPQ can be overkill

A Configure, Price, Quote system, or CPQ, is designed for a very specific type of sales environment. It is built for businesses that run high-volume, multi-product, approval-heavy deal cycles.

When your sales process is genuinely complex, with multiple products, custom configurations, contract-based discounts, and negotiated terms, a CPQ system can be invaluable.

It helps sales teams price accurately, stay compliant with approvals, and generate professional quotes that can handle every scenario you throw at them.

But all that power and precision comes at a price. And for many organisations, that level of horsepower is unnecessary for the deals they handle day to day.

Flexibility comes at a cost

To deliver a high level of flexibility, CPQ systems rely on complex rules engines (often multiple engines layered together) to handle every possible pricing scenario, product combination, and configuration safeguard.

And designing, implementing, and maintaining those engines isn't trivial:

- Projects can stretch for months or even years
- Large consulting budgets and dedicated admin teams are common
- Projects become tangled in the complexity and scale of the consulting teams needed to deliver them (and quite often fail as a result)
- The more rules you bake in, the heavier and more rigid the system becomes

This works well for huge projects with lots of moving parts. But if your sales cycles are shorter and your products only need light configuration or basic pricing adjustments, CPQ can quickly feel like too much.

Traditional CPQ also assumes a longer, deferred sales cycle. And the typical flow can look like this: generate a quote, negotiate the details, revise it, run it through approvals, send an invoice, and then wait for payment. It simply isn't built for fast or in-person payments. Nor does it come with any EMV-certified hardware, PCI compliance, or cashiering tools.

If your team wants to collect payment in person or manage real-time inventory as they sell, you may find yourself paying for heavyweight features, unnecessary friction and complex implementation, only to end up working around them with manual processes for simpler deals.

5: Introducing the Salesforce-native middle ground

Most businesses don't sit at the extreme ends of the transaction spectrum.

They aren't purely retail walk-in and walk-out. And they aren't always negotiating 500-line-item B2B contracts that need heavyweight quoting stacks either.

Instead, they live somewhere in the middle. That means they want:

- The speed and usability of a checkout, with the control to apply discounts, special pricing, or bundles
- The flexibility to collect payments on the spot, while still tying each transaction to a known customer or account
- Real-time updates to customer accounts and inventory inside Salesforce
- The power to scale up or down as deals get more complex
- A system that goes live and delivers return on investment quickly

That's where Eposly comes in.

What is Eposly?

Eposly is a Salesforce-native, all-in-one checkout solution for businesses that have outgrown spreadsheets but don't want the overhead of a full enterprise CPQ.

Sitting right at the intersection of POS and CPQ, Eposly is designed for real-time payments and product workflows, combining cashiering, inventory updates, pricing control, quote-to-payment and CRM synchronisation into one, Salesforce-native flow.

No more awkward middleware or bolt-on sync processes. No more overwhelming features and processes. Just the best of what both POS and CPQ have to offer, without the drawbacks.

Key features at a glance

Here are a few features that make Eposly a powerful but practical fit.

Fully Salesforce native
Eposly is fully Salesforce native and uses core Salesforce objects. That means real-time data synchronisation with Salesforce CRM, CPQ, and OMS, and no awkward third-party integrations.

Rules-based configuration
Consultants and systems integrators can embed their own logic or screen elements to fit specific industries, pricing and processes.

Flexible pricing structures
Easily build in your own tiered pricing, volume discounts, custom overrides and customer-level pricing.

Customisable checkout flows
Build multi-channel payment experiences, add controlled cashiering where needed, and handle multi-currency pricing for international customers.

Payment processing, integration and cash management
Take full, partial and split payments with ease. Eposly is fully PCI compliant and integrates with top-tier payment providers, including Stitch, Adyen, CardConnect, Paysafe, Stripe, CardPointe, Square, TSYS and First Data.

Branded quote templates
Deliver polished, professional quotes when needed, combined with payment processing in the same transaction flow.

Order management
Connect Eposly with Salesforce OMS for unified sales and order tracking, real-time inventory updates, automatic stock adjustments and end-to-end fulfilment visibility.

Support for both long and short sales cycles
Whether you want to close a deal on the spot or manage an opportunity over days or weeks, Eposly supports all types of sales cycles.

Receipt printing and emailing
Issue professional receipts on the spot or send them by email, so customers always have proof of payment and your team has a clear transaction record.

Cash drawer and user session management
Monitor each cash drawer's opening and closing balance, track who handled each transaction and maintain a clear record for accountability and compliance.

Scalability
Eposly is designed to scale and grow alongside you as your needs evolve, whether you're a small business or a large enterprise.

Example field transaction inside Eposly

What does a field transaction look like inside Eposly?
Let's look at a real-world example of a cosmetic surgery clinic to find out.

During an interaction with the customer, the front desk member or care coordinator can pull up the customer's record in Salesforce and view the customer's history and information.

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From there, they can add services (such as consultation fees, diagnostic tests, or optional treatments) directly into the checkout flow, and the team can adjust pricing based on negotiated discounts or special offers.

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If the customer wants to review their quote, compare options or talk through payment plans, the team can easily update line items, apply approved discounts, and keep every revision linked to the customer's profile.

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Once the customer is ready to move forward, they can pay by card, pay-by-link, or any other secure method the clinic supports.

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The entire transaction syncs back to the patient's core record. The account balance adjusts in real time and any prescription inventory is updated automatically.

6: Solution-fit matrix

Choosing the right approach for your business isn't always obvious.

Our solution-fit matrix breaks down how traditional POS, Eposly and CPQ compare against the most common needs of modern teams.

Need	Traditional POS	Eposly	CPQ
Real-time payment	✅	✅	❌
Inventory tracking	❌	✅	⚠️
Quote-based pricing	❌	⚠️	✅
Field agent use	⚠️	✅	❌
Regulated industry compliance	❌	✅	✅
Native Salesforce integration	❌	✅	✅
Ease of use	✅	✅	❌
Transaction speed	✅	✅	❌

7: Real-world applications

Here are just a few ways businesses in different industries can put Eposly to work.

Healthcare

In healthcare, transactions are rarely just a single line item. Instead, payments are often tied to a patient's individual treatment plan or procedure, which can change depending on diagnosis, follow-up care, or negotiated fees.

With Eposly, every payment connects directly to the patient's CRM record. A doctor or administrator can add services, tests, or optional treatments right in the checkout flow and adjust pricing if needed.

Front-desk teams can then take payments on the spot, issue a receipt, and update the patient's balance in real time.

Manufacturing

For industrial or wholesale businesses, managing larger transactions and volume-based pricing is essential. But they still want to keep workflows lean.

Eposly makes this possible by supporting multi-location inventory management, applying volume-based discounts, and automating fulfilment processes, all without forcing you into a complex CPQ project.

Everything flows back into Salesforce automatically, so sales, operations, and finance stay aligned.

Automotive

Dealerships and parts counters are classic examples of sales that are "more than retail" but don't quite need the heavy machinery of CPQ.

An auto parts counter, for example, might need to quote, configure, and sell parts with different options or bundles. Or a dealership might want to combine a trade-in valuation, new parts, and after-sales service into a single, clear transaction.

With Eposly, payments, product or inventory updates, and customer account records stay in sync inside Salesforce. And teams can deliver a great buying experience without juggling multiple disconnected tools.

Government and public sector

Government agencies often need to handle in-person transactions at the front desk while keeping accurate, auditable records tied to a citizen's or business's account.

With Eposly, a local government office can collect real-time payments for parking permits, building licenses, and vehicle plate renewals.

Because it is Salesforce-native, every payment automatically links to the correct citizen profile, updates any related entitlements or balances, and keeps the entire history in one place. This makes compliance and reporting much simpler and helps frontline staff serve people faster.

8: Omring Case Study

Omring provides a wide range of services to support the health and well-being of seniors and individuals with disabilities throughout the Netherlands.

Their retail stores serve an elderly customer base, many of whom rely on mobility aids and medical equipment. Keeping inventory accurate, managing rentals, and making every checkout smooth and easy were all critical. But their old tools could not keep up.

Since implementing Eposly, Omring can now run their entire operation directly in Salesforce. Store teams use mobile POS devices that make transactions faster and easier, even for customers who need extra support at the counter.

Inventory is tracked in real time, including complex rental items that require careful monitoring and pricing accuracy, and staff can serve customers confidently in their preferred language, supporting inclusivity and accessibility.

Finally, management has clear, real-time visibility into stock levels, rental returns, and sales performance across all retail locations.

Read the full case study

As a result:

- Rental and sales inventory levels are now tracked with 100% accuracy
- Rental pricing accuracy increased by 80%
- Overall sales grew by 8.5%

Don’t overbuild or underserve

When your sales cycles are quick and standardised, a traditional POS system keeps everything moving.

When your sales cycles demand detailed configurations, negotiated pricing, multi-product bundles, complex contracts, and multiple layers of approvals, a full CPQ suite is worth the investment.

But when your transactions need more than a checkout but less than a heavyweight quote, you shouldn’t have to choose between underbuilding and overserving.

Eposly fills the gap with a Salesforce-native solution that brings real-time payments, product workflows, pricing controls, and customer context together, all without the burden of bloated rules engines, multi-year implementation timelines, or features you will never use.

Want to see what that looks like in action?

Book Demo