

Ensured an Immaculate Implementation of Custom Salesforce® CPQ Solution

HIGHLIGHTS



A Custom Solution to Overcome Salesforce® CPQ Limitations



Streamlined Quote-to-Cash Process



Improved Sales Productivity

THE CLIENT

The client is a leading provider of physical resource management software based out of the US. The client has been in business for more than two decades and enjoys a global clientele of over 7000 customers. They help businesses transform how they manage their physical resources and optimize all stages of real estate, facilities & asset management, etc.

THE CONTEXT

The client was heavily invested in the Salesforce ecosystem and was using various Salesforce products for a number of business operations. They were using Salesforce CPQ to manage bundle, Block pricing, and quote generation. The process of quote generation is very crucial for any business and there was an issue that was troubling them - **Block pricing**.

THE OBJECTIVE

The client was offering a number of products with more than 50 Block tiers however, Salesforce CPQ only supports up to 50 Block tiers. Therefore, they approached us to find a solution to this problem. Since it was a Salesforce limitation, there was no other solution but to build a custom solution that could support a greater number of Block tiers.

THE SOLUTION

As we earlier stated, Salesforce CPQ has a limitation that it doesn't support more than 50 Block tiers for a product. But the client was offering many products with more than 50 block tiers, so the configuration and implementation was getting affected.

At first, our Salesforce experts assessed the instance and the possibilities to overcome the problem. After analysis, our experts came to the conclusion that a custom solution needs to be developed to support the use case.

Given is the detailed, point-by-point solution that our experts carried out:

1. Developing the custom solution

In the first phase, our experts worked on and developed a custom solution that extends the capabilities of Salesforce CPQ. The custom solution extends the limit of Block tiers and supports 50+ Block tiers.

2. Customizing functionalities to align with the solution

Extending the limit of Block tiers, however, was not enough. There were a number of customizations that had to be done to make the solution work flawlessly. So, for products with more than 50 Block tiers, our experts implemented customized price rules for a single currency.

3. Recreating Block pricing mechanism

Standard Block pricings wouldn't have worked in the custom solution that our Salesforce experts had developed as the block tiers' limit was exceeding than the standard one. Thus, the pricing mechanism had to be recreated from scratch.

Grazitti's experts, within the list price process, recreated the Block pricing mechanism to overcome the limitation of Block pricing.

4. Configuring products and onboarding

Once the custom solution was set up, the next step was the configuration of products within the Salesforce CPQ instance. Products with more than 50 Block tiers were no longer an issue, so the configuration went well.

5. Quality Analysis and Handover

Following the configuration, the instance was rigorously tested for each and every functionality. After it was okayed by QA, the instance was handed over to the client.

THE OUTCOME

The implementation of Salesforce CPQ wouldn't have been possible unless the limitation of Salesforce CPQ supporting up to 50 Block tiers was overcome. So, the custom solution developed by Grazitti's Salesforce experts could support more than 50 Block tiers and thereby, ensured a smooth implementation.

With a better-facilitated Block pricing mechanism, the Quote-to-Cash process became streamlined. And with an easier Quote-to-Cash process, sales productivity also witnessed an upward rally.