DALTON CRM

CPQ QUOTE TO CASH CLOUD

Quick Starts help speed the implementation and adoption of Salesforce Cloud Technology. In many cases they provide a first introduction to a new way of servicing your customers, whilst delivering improved efficiency and productivity for Sales and Service.

Quick Start

salesforce
PARTNER

DALTON CRM

CERTIFIED CPQ Specialist

salesforce PARTNER

CPQ Quote to Cash Quick Start

Quick Starts help speed the implementation and adoption of Salesforce Cloud Technology. In many cases they provide a first introduction to a new way of servicing your customers, whilst delivering improved efficiency and productivity for Sales and Service.

The Quick Start focusses primarily on leveraging Salesforces Declarative (Low-Code) functionality to achieve improved performance. This powerful functionality can satisfy most business needs. Whilst some task areas are outside the scope of a Quick Start, the process can identify which task areas may need a full coding approach (see below) and we will price these accordingly within the same reasonable pricing model used for Quick Starts.

Tasks - Functional Areas	Quick Start	Quick Start Plus
Discovery/Business Process Review		
Workshop to Map CPQ Processes	√	√
Products, Bundles, Quotes, Discounts etc.	√	√
Preparation of CPQ Process Document	√	√
Sign-off on Requirements Document	√	√
Kick Off Session - Roles and Responsibilities		
2-3 Hours to define responsibility and timeline	√	√
Sponsor, Admin, Internal team responsibilities		
Security and Access		
Install Salesforce CPQ package	√	√
Configure User Profiles	Up to 5	8
Create CPQ sandbox environment	√	√
CPQ Application Configuration Product Bundles		
Bundles	Up to 6	10
Bundle Options Total	Up to 50	70
Product Features	Up to 20	30
Configuration or Pricing Rules	Up to 5	8
CPQ Application Configuration Pricing		

Discount Schedules	**2**	**4**
Block Prices	**2**	**4**
Subscription	**2**	**4**
Enable Discretionary Discounting	**√**	**√**

Automations of Business Processes		
Custom Workflows	**10**	**15**
Quote Approval Process	**1**	**2**
Validation Rules	**3**	**5**
Enable Multi-Currency if required	**√**	**√**
Quote Template (English language)	**1**	**2**

Data Import		
Import of records		**Priced Separately**
Provide guidance for Data Input	**√**	**√**
Data Cleaning / Preparation	**Customer Action**	**Customer Action**

Go Live / User Training – Max 10 people		
User Acceptance Training(UAT) (Hours)	**7**	**12**
System Administration Training (Hours)	**4**	**7**
Follow Up Support (Days) - Email Support	**10**	**15**
On Site Training	**Travel costs**	**Travel costs**

Areas that are generally outside the scope of a Quick Start:-

- Specific code and low code external interactions
- Integration with external system
- Specialist areas with the cloud functionality that require more time to implement.
  Example may include:
  - Salesforce Knowledge
  - Forecasting
  - Territories
  - Multicurrency
  - Social Sign-On
  - Developing HTML or CSS
- Design of templates beyond standard functionality
- Apex coding , Visualforce pages, Lightning Web components
- Data Migration: Data population, preparation and cleansing. However guidance and uploading is provided. Large data migration may incur additional costs.

 Any of the above requirements can be discussed prior to project assignment and priced reasonably.

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www.daltoncrm.com

Contact: Fran Dalton 083 152 6813 (local) 353 (0) 83 152 6813 (international)