

# QUICKSTART—SALESFORCE CPQ + BILLING

Deluxe Package—\$38,000

Timeline—8 weeks



QuickStart packages allow you to begin using Salesforce soon and hit the ground running. From our experience with hundreds of Salesforce implementations, we've discovered the best practices to give you a fast return on your Salesforce investment and lay the groundwork for long-term success. These recommended configurations allow you to begin using Salesforce immediately upon project completion and provide a solid foundation for your future Salesforce goals.

## CPQ Scope

- 1 Currency
- 1 Pricebook
- 1 Output Document in English
  - Standard CPQ Quote Document Output
  - Up to 5 pages
- Product Data Load
  - Up to 350 Products
  - Up to 5 Bundles
  - Up to 10 Price Rules
  - Up to 10 Product Rules
  - Up to 5 Discount Schedules
- Custom Fields
  - Up to 15 on the Product Object, Quote Lines Object, or Quote Object
- Enable Contracts and Orders
- Approvals Processing
- 1 Custom Object Lookup Table with up to 5 Custom Fields
- User Profiles
  - Up to 3 profiles to include Admin + Manager + Sales
- Limited Migration
  - CommerceCX is responsible to deploy into production

## Billing Scope

- Up to four Billing Rules
- Up to four Tax Rules
- Up to four General Ledger Rules
- Up to four Revenue Recognition Rules
- Up to two Legal Entities
- 1 Invoice Document using Conga
- 1 supported Payment Gateway integration
- 1 supported Tax Package integration
- 1 contract management process that allows for amending and renewing of contracts
- 1 workflow process for emailing Invoices to the Billing Contact
- Dunning Notice configuration
- Integration: 1 data flow to ERP/Financials System of Record
- Period end closing support

- ### Advantages of a QuickStart Package
- Begin using Salesforce in a matter of weeks
  - Receive expert guidance for your Salesforce plans
  - Includes clearly defined deliverables
  - Flexible time and materials approach

## Assumptions

Client has cleansed their data ahead of time including:

- Accounts
- Products
- Pricelists

Credentials for a refreshed copy of the Sandbox are provided to CommerceCX prior to Project Kickoff

Client provides a SME capable and available to work with CommerceCX Architect

Client provides up to a 6-hour Knowledge Transfer session for the CommerceCX team

## Out of Scope

Translations  
End User Training



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