

CPQ

ESSENTIALS

3-5 WEEKS

\$21,700



WHAT'S INCLUDED?

- Conduct 02 workshops to capture the quoting process workflow details.
- **CPQ Package Setup Setup:**
 - Update user profiles to grant access to CPQ functionality
 - Configure and setup the CPQ feature package (Settings)
Assumes the existing currency setup is still valid.
- **Opportunities Setup:**
 - 01 Page Layout to expose the new CPQ Quote access
 - 01 Record Type (if needed)
 - Sales Process Definition (Opportunity Stages) (if needed, limited to 01 Sales Process)
- **Products:**
 - Set Products to use the CPQ Product Page Layout
 - Configure Products different elements such as UOM, Pricing Model, Bundle structure, Discount tiers.
- **Price Books:** Create 01 new pricebook for the new CPQ configuration.
- **CPQ Quote & Quote Line Editor:**
 - Configuration of CPQ Fields, Page Layouts, Lightning Pages, Record Types, Custom Fields.
 - Configuration is limited to 01 version of the Quote Line Editor.
- **Product Rules:** Product Selection Restrictions & Validations.
- **Price Rules:** Price rules can be used to trigger additional calculations during Quoting process.
- **Approvals:** Allotted time to create 01 approval process.
- **Quote Template:** Standard CPQ Quote Template Setup & Logic.
- **Quote to Order Handoff:** Trigger automation to convert CPQ Quote in a Salesforce Order.
- **Contracts:** Configuration of Fields, 01 Page Layout, 01 Lightning Page, 01 Record Type.
- **Subscription Lifecycle:** Amendments (increase or decrease of contract), Renewals.
- **Assets.**
- **Automation:** Up to 16 hours to build any specific automations around CPQ
- **User Acceptance Testing (UAT)**
- **Training:** Train the Trainer model with up to 2 hours of guided sessions
- **Deployment:** Migration of solution from "Sandbox" to "Production" environment
- **Golive Support Hours.**



KICK-OFF

Intro meeting with delivery team.



DISCOVERY

Dive into tailored sessions with our Delivery team, followed by multiple dynamic demo iterations!



TRAINING & DATA

LOAD

Bring your data to the table and join our personalized training session



GO-LIVE

Launching and Thriving: We've Got Your Back through Go-Live and Beyond

OUT OF SCOPE: Process Automation - Approvals, Workflows, Process Builders, Flows; 3rd Party Integrations; Advanced Features; Work or Training in Sandbox Environment; Custom Code - Apex Triggers, Apex Code

GET IN TOUCH

+1 647-963-1855

Let's Talk
evolving-consulting.com

1 Hunter St E, Ground
Floor, Hamilton,
Ontario L8N 3W1, CA



EC
Evolving-Consulting