

Salesforce CPQ Case Study

Use Case Introduction

This Use Case has been developed for our one of client new system for managing the logistic process based on the design team's gathering of business and functional area requirements. The salesforce cpq will replace the manual sales processes currently utilized by client. Client has identified business needs for reducing manual process and no human error while preparing the big proposal also wanted to split the commission by system

The new salesforce system will be designed to meet these business needs and improve the client's overall business strategy.

We helped them implement the salesforce cpq (End-to-End) to drive their business in logistics.

Explanation Of Use Case Contents

Name Of the Use Case: Salesforce CPQ implementation for our client.

Description: The implementation gave every salesperson of our client pipeline filled with the right candidates at the right time and also gives them the feasibility of contacting good resources.

Deliverables – A efficient salesforce system to prepare the proposal as fast as it's possible.

Use Case Implementation

Setup the user licenses and permission set

Setup the web to lead form

Enable the duplicate rules for the Account

Setup the automate approval conversion

Setup automated lead conversion

Salesforce CPQ Configuration & Product Configuration & Pricebook

Setup screen flows and record trigger flows

Salesforce CPQ Architecture

Salesforce CPQ provide an efficient way to prepare the quote for the customer so they can quickly decide to close the deal or make any adjustments if needed and empower sales to close more deals.

Implementation

Implemented Web to Lead

Web-to-Lead Setup

Using pre-existing pages on your company's website, you can capture contact and profile information from users and automatically generate new leads in salesforce.com, enabling you to respond in real-time to customer requests.



Web-to-Lead Settings [Edit](#) [Create Web-to-Lead Form](#)

Web-to-Lead Enabled

Require reCAPTCHA Verification

Default Lead Creator **Will Mark**

Default Response Template

Get Info Before You Start

- [What is the maximum number of leads I can capture?](#)
- [How do I specify which information to capture?](#)
- [Can I capture leads from multiple web pages?](#)
- [What status is assigned to web-generated leads?](#)
- [How can I be sure that leads will not be lost?](#)

Duplicate Rules Configuration

Rule Name ↑	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Account Name Match Only	A rule that is only using account name to make a match.	Account	Account Name Match Only matching rule	✓	ADada	8/13/2021
Carrier Account Duplicate Rule	Duplicate rule for Account record type 'Carrier' with exact match on MC Number	Account	Carrier Account Duplicate matching rule	✓	Unassign	10/13/2021
Standard Account Duplicate Rule	Duplicate Rule for Accounts using the Standard Account Matching Rule	Account	Standard Account Matching Rule	✓	ADada	8/13/2021
Standard Contact Duplicate Rule	Duplicate Rule for Contacts using the Standard Contact Matching Rule	Contact	HubSpotContact HubSpotLead	✓	wmark	3/30/2023
Standard Lead Duplicate Rule	Duplicate Rule for Leads using the Standard Lead Matching Rule	Lead	HubSpotLeadEmailOnly HubSpotContact Standard Account Matching Rule	✓	wmark	4/4/2023
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	HubSpotLead	✓	wmark	3/30/2023
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	HubSpotContact	✓	wmark	4/4/2023

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | A

Lightning record page configuration

Account
Now Foods

Brokerage Seller
 AS Open Accounts

Carrier TMS Status

OpenDock Status
 Active Customer

ShipperGuide Status

Details

Activity

▼ Firmographics

Account Name	Now Foods		AS Status	Open	
Parent Account			AS Days Left		
Conversational Name			Annual Revenue	\$650,000,000	
Alice Shipper Name			Total Freight Spend (calculated)	\$32,500,000.00	
Phone	(630) 545-9098		Total Freight Spend (validated)	\$0	
Website	www.nowfoods.com		Annual Revenue (validated)		
Employees	5,000		Account Tier	ME	
AM Owner Team	Sales & Service Ops		Type	Shipper	
Credit Limit			Industry	Health & Nutrition Products	
Is Inactive	<input type="checkbox"/>		Share of Wallet (calculated)	0%	
Tax ID			Share of Wallet (validated)		
NetSuite ID	16165d77-e870-4679-a7b1-496539f3531c		Ranking with Shipper	N/A	
Expected PTA			Carriers in Network	0	
Expected OTD			Zoominfo Intent ID		
Expected OTP			G2 Buyer Intent Activity Level		
Account Segment	Tier 3		G2 Buyer Intent Buying Stage		
Performance Index	Low		G2 Buyer Intent Details		
Potential Index	Low				
Gross Profit (LTM)	\$0.00				

Sales process setup

Sales Processes

[Help for this Page](#)

Use this page to create and maintain the Sales Processes used within your organization. A Sales Process contains the Stages an Opportunity follows through its sales cycle.
 Note: After creating a new Sales Process, associate it with one or more [Opportunity Record Type](#) to apply it to new opportunities.

Action	Sales Process Name	Description	Active	Modified By
Edit Del	Customer	Inactive - won't let us delete	✓	Will Brown 7/22/2020 11:08 AM
Edit Del	Integration	Types: Quoting Integrations, Non-integrations	✓	Will Mark 12/16/2022 2:50 PM
Edit Del	Loadsmart Sales Process	Inactive - won't let us delete	✓	Will Brown 7/22/2020 11:08 AM
Edit Del	Managed Transportation	Types: Sole Source, Managed TMS, Professional Services	✓	Shashank Parashar 6/4/2024 12:13 PM
Edit Del	New Customer	Types: FTL, LTL, Rail, Port Drayage, Transload, Intermodal	✓	Shashank Parashar 7/28/2023 8:50 AM
Edit Del	REP	Types: FTL Contracts, Port Drayage Contracts	✓	Will Brown 12/22/2020 3:08 PM
Edit Del	SaaS	Types: RFPGuide, Kamion, Loadsmart Integration Network, RateGuide	✓	Jamie Jackson 10/11/2022 7:51 PM

Quote generation

The screenshot shows the Salesforce CPQ interface for an opportunity named 'Loadsmart Test Account'. The 'Create Quote' button is highlighted in yellow. The page includes a navigation bar, a search bar, and various tabs like 'Qualification', 'Solution', 'Quote', 'Contract', and 'Closed'. A 'Mark Stage as Complete' button is visible. On the right, there are 'Related List Quick Links' and a 'Collectricity' summary card.

The screenshot shows the 'Create Quote' modal form. The 'Primary' checkbox is checked. The 'Billing Frequency' is set to 'Annual'. The 'Start Date' is '5/23/2030'. The 'Account' is 'Loadsmart Test Account'. The 'Subscription Term' is '12'. The 'Opportunity' is 'Loadsmart Test Account | 2030-05-24 | 36 | Renewal Opportunity'. There are 'Cancel' and 'Save' buttons at the bottom.

Quote line configuration

Salesforce CPQ Home Accounts Opportunities CPQ Quotes Solution Groups Discount Schedules Quote Templates Products Product Rules Reports Dashboards Import Formats Product Options More

Q-15276 Edit Quote Add Bundle Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

CPQ Quote Information Start Date 1/1/2022 Subscription Term 12 Target Customer Amount

#	PRODUCT NAME	PRODUCT CODE	OPTIONAL	LIST UNIT PRICE	QUANTITY	UOM	VERRIDE LIST UNIT PRICE	ADDITIONAL DISC.	PRORATE MULTIPL...	NET UNIT PRICE	NET TOTAL
1	ShipperGuide - Premium Subscription	SG01-PR	<input type="checkbox"/>	\$ 500.00	1				12.0000	\$ 6,000.00	\$ 6,000.00
SUBTOTAL:											\$ 6,000.00
QUOTE TOTAL:											\$ 6,000.00

Proposal generation

175 W Jackson, Blvd, Suite 1400
Chicago, IL
US
60604
Phone: (319) 325-7499

Bill To

Adriana Dada
Loadsmart Test Account
150 North Michigan Avenue, Ste 1900
Chicago, Illinois
60601
United States
1199999999

SALESPERSON	EMAIL	BILLING FREQUENCY	PAYMENT TERMS
Davi Camas	davi.camasa@loadsmart.com	Annual	Net 30

Shipper Guide

QTY	PART #	PRODUCT	DESCRIPTION	SERVICE START DATE	SERVICE END DATE	NET TOTAL
1.00	SG01-PR	ShipperGuide - Premium Subscription	Licensing access to ShipperGuide upon execution of order form and payment being received	1/1/2022	12/31/2022	\$6,000.00
Shipper Guide SUBTOTAL:						\$6,000.00
Shipper Guide TOTAL:						\$6,000.00

Annual Amount (First Year): **\$6,000.00**

Sales overview after salesforce CPQ implementation

