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

How can I be sure that leads will not be lost?

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.

ast Name	Owner	A test			Name and Post of Tax Page 👻	
astriante	Create Now I	and print out	No. Street			
E manif	New L	eau sintiada			Name Street, M.	
E-man		1 m	Company	-	Total Loss Treasu	
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		anama, pana	proce Table			

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 ca	apture?	
 How do I specify which information to capture? 		
Can I capture leads from multiple web pages?		
 What status is assigned to web-generated lead 	ls?	

Duplicate Rules Configuration

	New Rule 🔻					
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	1	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	1	<u>Unassign</u>	10/13/2021
Standard Account Duplicate Rule	Duplicate Rule for Accounts using the Standard Account Matching Rule	Account	Standard Account Matching Rule	1	ADada	8/13/2021
Standard Contact Duplicate Rule	Duplicate Rule for Contacts using the Standard Contact Matching Rule	Contact	HubSpotContact HubSpotLead	1	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	1	<u>wmark</u>	4/4/2023
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	HubSpotLead	1	<u>wmark</u>	3/30/2023
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	HubSpotContact	1	<u>wmark</u>	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

Lightning record page configuration

Account Now Food	IS (Å)				
rokerage Seller	Carrier TMS Status	OpenD Active	ock Status St Customer	nipperGuide Status	
Details Ac	tivity	291 V 35			27
	livity				
 Firmographics 					
Account Name	Now Foods	1	AS Status 🚯	Open	
Parent Account		1	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)		1
Employees	5,000	1	Account Tier 🕚	ME	
AM Owner Team	Sales & Service Ops		Туре 🕚	Shipper	1
Credit Limit			Industry 🚯	Health & Nutrition Products	1
Is Inactive			Share of Wallet (calculated) 🕕	0%	
Tax ID			Share of Wallet (validated) 🕕		1
NetSuite ID	16165d77-e870-4679-a7b1- 496539f3531c	/	Ranking with Shipper	N/A	
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Expected OTD 🚺		di seconda de la constante de	Zoominfo Intent ID		1
Expected OTP 🕚		1	G2 Buyer Intent Activity Level		1
Account Segment	Tier 3		G2 Buyer Intent Buying Stage 🚯		
Performance Index	Low		G2 Buyer Intent Details		1
Potential Index	Low	/			

Sales process setup

Help for this Page 🔞

Sales Processes

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 <u>Opportunity Record Type</u> to apply it to new opportunities.

Sales Proc	ess	New		Sales Process Help 🥑
Action	Sales Process Name	Description	Active	Modified By
Edit Del	Customer	Inactive - won't let us delete	1	Will Brown, 7/22/2020 11:08 AM
Edit Del	Integration	Types: Quoting Integrations, Non-Integrations	1	Will Mark, 12/16/2022 2:50 PM
Edit Del	Loadsmart Sales Process	Inactive - won't let us delete	1	Will Brown, 7/22/2020 11:08 AM
Edit Del	Managed Transportation	Types: Sole Source, Managed TMS, Professional Services	1	Shashank Parashar, 6/4/2024 12:13 PM
Edit Del	New Customer	Types: FTL, LTL, Rail, Port Drayage, Transload, Intermodal	1	Shashank Parashar, 7/28/2023 8:50 AM
Edit Del	REP	Types: FTL Contracts, Port Drayage Contracts	1	Will Brown, 12/22/2020 3:08 PM
Edit Del	SaaS	Types: RFPGuide, Kamion, Loadsmart Integration Network, RateGuide	~	Jarvis Jackson, 10/11/2022 7:51 PM

Quote generation

Sandbox: staging Log.out	
Q, Search	** 🖩 🕸 ? 🌣 🐥 🐻
Salesforce CPQ Home Accounts V Opportunities V CPQ Quotes V Solution Groups V Discount Schedules V Quote Templates V Products V	Product Rules 🗸 Reports 🗸 Dashboards 🗸 Import Formats 🗸 Product Options 🗸 More 🔻 🌒
Condismart Test Account 2030-05-24 36 Renewal Opportunity	+ Follow Ironclad Contract Create Cucity Create Orbicarding V
Subscription Status Close Date Amount Pending 5/23/2030 \$18.000.00	
Qualification Solution Quote Contract Closed	Related List Quick Links
Stage: Qualification	Complete Operation Product Feedback (0) Quote Documents (0) Contracts (0)
Key Fields	Edit Show All (16)
OD SSO Required	Collectricity
OD Non-standard Use Cases	Account Name Ranking with Shipper
SG Rate Types	Carriers in Network O Total Freight Spend (validated) O
SG Equipment Types Used	44 \$1,200,000 Functional Fit () Primary FTL TMS ()
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Details Activity Master Service Agreement	Estimated Warehouses 20
v DEP Rutsile	

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Subscription Status Pending	Close Date 5/23/2030	Amount \$18,000.00								
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SG Rate Types SG Equipment Types Used			Subscription Term]	Opportunity Opportunity Opportunity Opportunity Loadsmart Test Account 2030-05-24 36 Renewal Opportunity	•		Total Freight Spend \$1,200,000 Primary FTL TMS	d (validated)	/
Details Activity	Master Servic	e Agreement			Canvel Sa	nazma s O	n	ышау		
✓ RFP Details										

Quote line configuration

	Salesforce CPQ	Home Accounts	✓ Opportunities ✓	CPQ Quotes 🗸 Soluti	on Groups 🗸 Discou	nt Schedules 🗸 Quote	Templates 🗸 Products 🗸 P	Product Rules 🗸 Repo	rts 🗸 Dashboards	✓ Import Formats ✓	Product Options $~ \lor ~$	More 🔻 🕚
Ħ	Q-15276 Edit Quote					Add Bundl	Add Products 🔻	Add Group Delete I	Lines 🄊 O	Quick Save Calculat	te Cancel Sa	ro \$₹
CPQ Q	Quote Information											
		Start Date 👩	1/1/2022 #			Subscription Term	12		Target Custo	mor Amount 👩		
		Start Date	1/1/2022 W									
. #	PRODUCT NAME	PRODUCT CODE	OPTIONAL	LIST UNIT PRICE	QUANTITY	UOM	OVERRIDE LIST UNIT PRICE	ADDITIONAL DISC.	PRORATE MULTIPL	NET UNIT PRICE	NET TOTAL	>
].#	PRODUCT NAME ShipperGuide - Premium Subscription	PRODUCT CODE SG01-PR	OPTIONAL	LIST UNIT PRICE \$ 500.00	QUANTITY 1	UOM	OVERRIDE LIST UNIT PRICE	ADDITIONAL DISC.	PRORATE MULTIPL 12.0000	NET UNIT PRICE \$ 6,000.00	NET TOTAL \$ 6,000.00	> ☆@≐%

QUOTE TOTAL: \$ 6,000.00

Proposal generation

Shipper Guide QTY PART # PRODUCT DESCRIPTION SERVICE SERVICE NET TOTAL 1.00 SG01-PR ShipperGuide Licensing access to ShipperGuide upon execution of order form and payment being received 1/1/2022 \$6,000.00 Shipper Guide SUBTOTAL: \$6,000.00 Shipper Guide SUBTOTAL: \$6,000.00	Shippe QTY 1.00	lorth Michigan go, Illinois d States 1999999 SALESPE Davi Ca Davi Ca per Guide PART # SG01-PR	PRODUCT ShipperGuid Premium Subscription	EMAIL davi.camas@loadsmart	to ShipperGuide upon form and payment being	SERVICE START DATE 1/1/2022 Shipper Guide Shipper G	PAYN SERVICE END DATE 12/31/2022 SUBTOTAL: Suide TOTAL:	Net 30 NET TOTAL \$6,000.00 \$6,000.00 \$6,000.00
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Sales overview after salesforce CPQ implementation