



## 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
<b>Discovery/Business Process Review</b>		
Workshop to Map CPQ Processes	✓	✓
Products, Bundles, Quotes, Discounts etc.	✓	✓
Preparation of CPQ Process Document	✓	✓
Sign-off on Requirements Document	✓	✓
<b>Kick Off Session - Roles and Responsibilities</b>		
2-3 Hours to define responsibility and timeline Sponsor, Admin, Internal team responsibilities	✓	✓
<b>Security and Access</b>		
Install Salesforce CPQ package	✓	✓
Configure User Profiles	Up to 5	8
Create CPQ sandbox environment	✓	✓
<b>CPQ Application Configuration Product Bundles</b>		
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
<b>CPQ Application Configuration Pricing</b>		

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.

Dalton CRM

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