





BUILDING A CPQ APP











Our **Customer**

have been providing innovative beverage solutions and exceptional coffee for over 25 years. They design and supply a range of products and ingredients to meet the demands of almost any environment. From hospitals and schools to corporate spaces and offices, Bridge Valley Group offer a complete service equipping customers with bespoke beverage stations, ingredients supply, marketing support, and aftercare.

What **bothered** them



Customer is following four different business processes with same products which are Sales, Rental, Lease and Free Loan. To achieve this, maintaining separate databases/set of excel sheets per process were maintained, which ultimately becomes tedious job to process quotes.

Using different systems for product management, creation of quotes and creation of Orders/Job sheet, resulted in too much of manual and repetitive work, also syncing of data across systems was major challenge. Most of the valuable time of Sales Reps was consumed in maintaining all data at same level and ensure right information is being used, resulting in loss of productivity of the Sales team.

What we did



The customer wanted a system which manage right from adding products to quote, approval of quote, notification to customers as well as sales reps, creation of job sheet which will be then handed over to manufacturing team to process order. All these can be achieved from Salesforce CPQ (Configure Product Quote) which is a complete installed package that can fulfill customer's requirement. Aress sent Sr. Business Analyst to customer's site to analyze their different processes and get the detailed requirements. After understanding the requirements in detail, we came up with suggestion of using Salesforce CPQ and developed a complete system which fulfills client's requirements.

During entire development and design Aress' focus was to build a robust system, that is simple to operate by resources and has fast motility with minimum number of clicks. The entire implementation process was conducted in an Iterative and Agile execution method. There were intermediate checkpoints through show and tell session, to capture user feedback. Some of the major CPQ features used are:

1. Created products for all the Categories like Equipment's (Coffee machines), it's Accessories, Ingredients, Service and Training

2. Configured Product bundles to include all the dependent Accessories, Ingredients, Service and Training for the Equipment

- 3. Product & Price rules
- 4. Discount Schedules for defining discount on product quantity range
- 5. Contracted price for using the discounted prices for specific Customers
- 6. Custom Quote templates for the four different business processes
- 7. Generation of Contracts from Order.



Simplified UI: Developed Product packages so sales reps can choose Equipments (Coffee machines), it's Accessories, Ingredients, Service and Training in one screen itself.





Bean to Cup									
FRESH MILK GRANULATED MILK TRAINING PACKAGE OTHER									
Fres	Fresh Milk Machines								
	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE				
	1.00	BV01234	Alto 200FM Bean to Cup Machine		£5,004.29				
	1.00	BV01236	Alto 400FM Touch		£6,685.00				
	1.00	BV01238	Alto 500FM Touch		£8,192.86				
	1.00	CP11	Cimbali S20 CP11		£8,728.57				
	1.00	BV5667	Cimbali S20 CP10		£8,728.57				
	1.00	CS11	Cimbali S20 CS11		£9,341.43				
	1.00	CS10	Cimbali S20 CS10		£9,341.43				
Fres	sh Milk Accessories								
	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE				
	1.00	AA001	Alto 4.5ltr Fridge Unit		£951.43				
	1.00	AA002	Alto Water Tank (for 200 and 400's)	Alto 400FM Bean to Cup Machine Inc 12 months Silver Warranty & Installation	£367.14				
	1.00	AA004	Alto Cup Warmer		£475.71				



Nesting of products (Bundle Configuration): Helps customer to get all products at single place which are of same category. Like select main category, it will display sub-category and will then display the list of Equipments matching the selection.





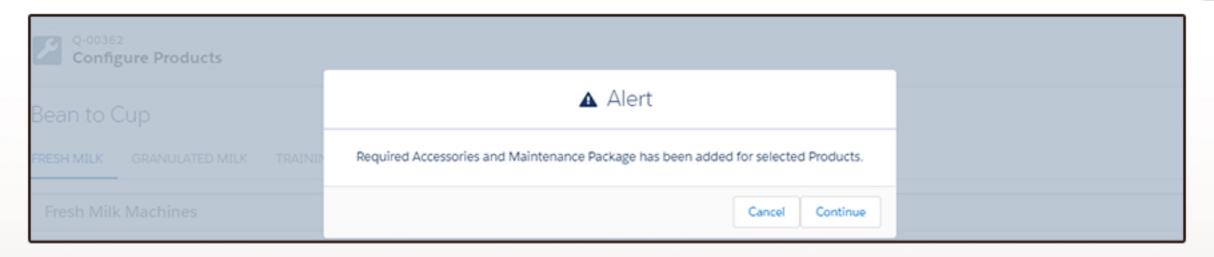


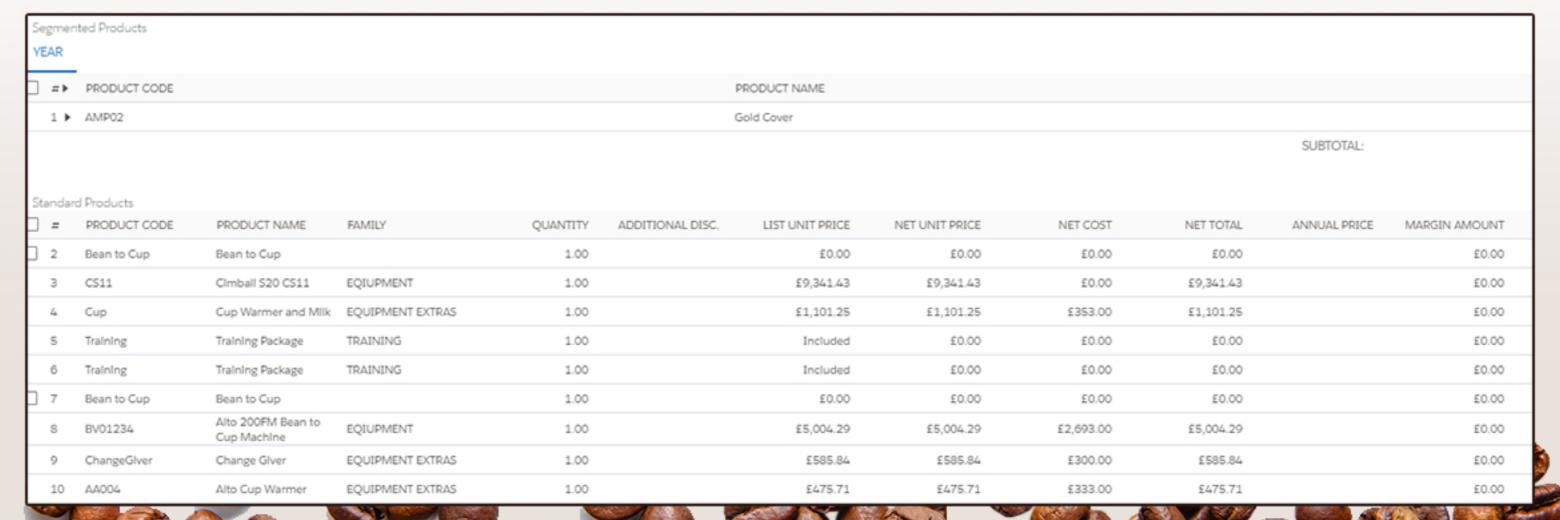
	Q-00362 Configure Products				▼ Cancel Save	
Alto	200FM Bean to Cup Mac	nine				
Other Options						
	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE	
\blacksquare	1.00	ChangeGiver	Change Giver		£585.84	
\blacksquare	1.00	AA004	Alto Cup Warmer		£475.71	
	1.00	Milk	Milk Chiller		£832.00	
	1.00	AA002	Alto Water Tank (for 200 and 400's)	Alto 400FM Bean to Cup Machine Inc 12 months Silver Warranty & Installation	£367.14	
	1.00	Cup	Cup Warmer and Milk		£1,101.25	

Automatic selection of dependent products: If Machine is selected all dependent accessories, ingredients, maintenance and training package will get selected. Saves time for the Sales Reps.





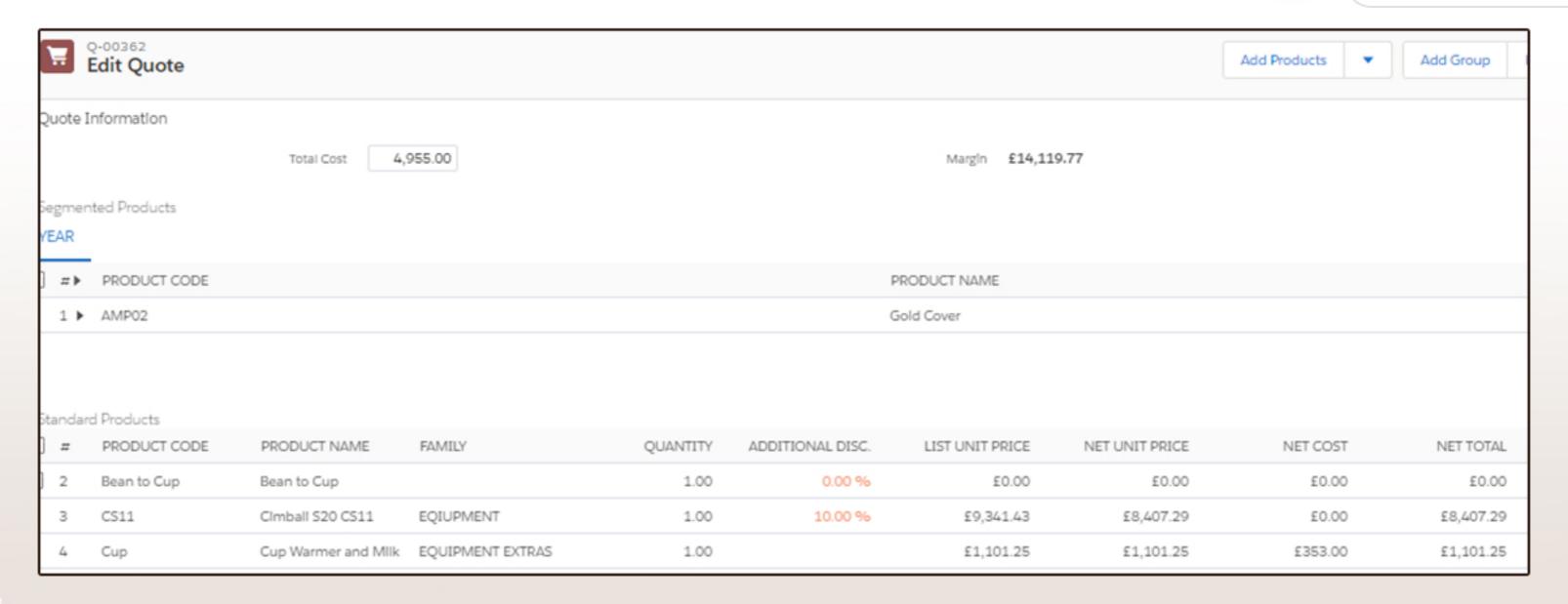




Discount and Margin Calculations: Sales Reps can add Additional Discount. Also do margin calculations on same screen without having to manually calculate.









Quotation PDF: Generation of Quote document which will be used to send the quote to Customer for eSignature, Sales reps and Manufacturing team as well.





QUOTATION FOR Sarah Buckingham 01745 314333 Initia pangurba@aress ACCOUNT NUMBER 00111000004/CEWQAN	Leem	Qu		lid for	2019 07:01 20 Days	Title will pass to custo PLEASE SIGN AND	at be advised within 2 working days. ESDE one when full payment is made. IN RETURN TO VALLEYBRIVERAGES, CO.UK	Signature Name Title Date	
Sarah Buckingham 01745 314333 vinta gangurbe@aress ACCOUNT NUMBER	Loom	Qu	uotation vali	lid for				Title	
Sarah Buckingham 01745 314333 vinta gangurbe@aress ACCOUNT NUMBER	Leem	Qu	uotation vali	lid for					
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ACCOUNT NUMBER	Leom								
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		Dwayne Marsh Mob: 07848 485 569			Hayne Marsh 1945 455 560				
			dwaynegor		estera coluk				
EGUPAENT		1217.0046	435		A titues				
PRODUCT CODE DET	AL.	UNITPRICE	2 Year Lease (p	pus) La	6 Year race (pw)				
CS11 Circl	bal 520 CS11	09:341.43	643.83	3.	£65.39				
6V01234 Ato	200FM Bean to Cup Machine	65,004.29	(23.48		£36.03				
Ato 200FM Beats to Cup PRODUCT DETAIL		UNIT PRICE	QUANTITY	DIBCOUNT	NET				
ChangeSiver		£585.84	1.00	-	TOTAL CS85.84				
AA004		6475.71	1.00		6475.71				
Mik		6832.00	1.00		6802.00				
AA002 Ans 4000	PM Sean to Cup Machine nonths Silver Warranty & Installation	£367.14	1.00		6367.54				
Oup		£1,101,25	1.00		£1,101.25				
Bean to Cup									
PRODUCT DETAIL		UNIT PRICE	QUANTITY	DISCOUNT	NET TOTAL				
Out		£1,101,26	1.00		£1,101.25				

Business Value realized by the Customer

Now, everything is available in one platform – Products and Product Bundles, Quote creation - approval, Notifications to Customers & Sales Reps and Job Sheet creation. Created simple interface for Sales Reps through which they can create quotes, apply discounts and do calculate margin and identify profit per quote. This resulted into faster turn-around, increased productivity. The system helped in better accessibility and improved customer experience. All the calculations and quote printing were implemented in Salesforce-CPQ.

