

BUILDING A **CPQ APP**



BRIDGE VALLEY GROUP



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

Fresh Milk Machines

	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00	BV01234	Alto 200FM Bean to Cup Machine		£5,004.29
<input type="checkbox"/>	1.00	BV01236	Alto 400FM Touch		£6,685.00
<input type="checkbox"/>	1.00	BV01238	Alto 500FM Touch		£8,192.86
<input type="checkbox"/>	1.00	CP11	Cimbali S20 CP11		£8,728.57
<input type="checkbox"/>	1.00	BV5667	Cimbali S20 CP10		£8,728.57
<input type="checkbox"/>	1.00	CS11	Cimbali S20 CS11		£9,341.43
<input type="checkbox"/>	1.00	CS10	Cimbali S20 CS10		£9,341.43

Fresh Milk Accessories

	QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input type="checkbox"/>	1.00	AA001	Alto 4.5ltr Fridge Unit		£951.43
<input type="checkbox"/>	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
<input type="checkbox"/>	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

Bean to Cup

FRESH MILK GRANULATED MILK TRAINING PACKAGE OTHER

Fresh Milk Machines

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00 Configure	BV01234	Alto 200FM Bean to Cup Machine		£5,004.29
<input type="checkbox"/>	BV01236	Alto 400FM Touch		£6,685.00

Q-00362 **Configure Products** Cancel Save

Alto 200FM Bean to Cup Machine

Other Options

QUANTITY	PRODUCT CODE	PRODUCT NAME	PRODUCT DESCRIPTION	UNIT PRICE
<input checked="" type="checkbox"/> 1.00	ChangeGiver	Change Giver		£585.84
<input checked="" type="checkbox"/> 1.00	AA004	Alto Cup Warmer		£475.71
<input checked="" type="checkbox"/> 1.00	Milk	Milk Chiller		£832.00
<input checked="" type="checkbox"/> 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
<input checked="" type="checkbox"/> 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.



Q-00362
Configure Products

Bean to Cup

FRESH MILK GRANULATED MILK TRAINING

Fresh Milk Machines

Alert

Required Accessories and Maintenance Package has been added for selected Products.

Cancel Continue

Segmented Products

YEAR

#	PRODUCT CODE	PRODUCT NAME									
1	AMP02	Gold Cover									
SUBTOTAL:											
Standard Products											
#	PRODUCT CODE	PRODUCT NAME	FAMILY	QUANTITY	ADDITIONAL DISC.	LIST UNIT PRICE	NET UNIT PRICE	NET COST	NET TOTAL	ANNUAL PRICE	MARGIN AMOUNT
2	Bean to Cup	Bean to Cup		1.00		£0.00	£0.00	£0.00	£0.00		£0.00
3	CS11	Clmball S20 CS11	EQUIPMENT	1.00		£9,341.43	£9,341.43	£0.00	£9,341.43		£0.00
4	Cup	Cup Warmer and Milk	EQUIPMENT EXTRAS	1.00		£1,101.25	£1,101.25	£353.00	£1,101.25		£0.00
5	Training	Training Package	TRAINING	1.00		Included	£0.00	£0.00	£0.00		£0.00
6	Training	Training Package	TRAINING	1.00		Included	£0.00	£0.00	£0.00		£0.00
7	Bean to Cup	Bean to Cup		1.00		£0.00	£0.00	£0.00	£0.00		£0.00
8	BV01234	Alto 200FM Bean to Cup Machine	EQUIPMENT	1.00		£5,004.29	£5,004.29	£2,693.00	£5,004.29		£0.00
9	ChangeGiver	Change Giver	EQUIPMENT EXTRAS	1.00		£585.84	£585.84	£300.00	£585.84		£0.00
10	AA004	Alto Cup Warmer	EQUIPMENT EXTRAS	1.00		£475.71	£475.71	£333.00	£475.71		£0.00

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



Q-00362
Edit Quote

[Add Products](#) [Add Group](#)

Quote Information

Total Cost Margin **£14,119.77**

Segmented Products

YEAR

#	PRODUCT CODE	PRODUCT NAME
1	AMP02	Gold Cover

Standard Products

#	PRODUCT CODE	PRODUCT NAME	FAMILY	QUANTITY	ADDITIONAL DISC.	LIST UNIT PRICE	NET UNIT PRICE	NET COST	NET TOTAL
2	Bean to Cup	Bean to Cup		1.00	0.00 %	£0.00	£0.00	£0.00	£0.00
3	CS11	Cimball S20 CS11	EQUIPMENT	1.00	10.00 %	£9,341.43	£8,407.29	£0.00	£8,407.29
4	Cup	Cup Warmer and Milk	EQUIPMENT EXTRAS	1.00		£1,101.25	£1,101.25	£353.00	£1,101.25



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 NUMBER Q00042		BRIDGE COFFEE ROASTERS		TERMS & CONDITIONS Any discrepancies must be advised within 2 working days. ESOE Title will pass to customer when full payment is made.	EXCEPTANCE Signature _____ Name _____ Title _____ Date _____
QUOTATION FOR Sarah Buckingham 01748 314333 vinta.gangurda@arress.com		Quotation Date: 07/02/2019 07:01 Quotation valid for: 30 Days Account Manager: Dwayne Marsh Mob: 07848 488 868 dwayne@bridgecoffee-roasters.co.uk		PLEASE SIGN AND RETURN TO ORDERS@BRIDGEVALLEYBEVERAGES.CO.UK	
ACCOUNT NUMBER 0011X000004/C2wQAM	ORDER CONTACT				
EQUIPMENT					
PRODUCT CODE	DETAILS	UNIT PRICE	3 YEAR LEASE (\$M)	5 YEAR LEASE (\$M)	6 YEAR LEASE (\$M)
CS11	Cimbali S20 CS11	£9,341.43	£43.83	£85.39	
BVD1234	Ato 200PM Bean to Cup Machine	£3,004.29	£23.48	£38.03	
EQUIPMENT EXTRAS					
Ato 200PM Bean to Cup Machine					
PRODUCT CODE	DETAILS	UNIT PRICE	QUANTITY	DISCOUNT	NET TOTAL
ChangeOver		£385.84	1.00		£385.84
AA004		£475.71	1.00		£475.71
MIX		£832.80	1.00		£832.80
AA002	Ato 400PM Bean to Cup Machine Inc 12 months Silver Warranty & Installation	£367.14	1.00		£367.14
Cup		£1,101.25	1.00		£1,101.25
Bean to Cup					
PRODUCT CODE	DETAILS	UNIT PRICE	QUANTITY	DISCOUNT	NET TOTAL
Cup		£1,101.25	1.00		£1,101.25
Bean to Cup					
PRODUCT CODE	DETAILS	UNIT PRICE	QUANTITY	DISCOUNT	NET TOTAL
AMP02		£1,200.00	1.00		£1,200.00

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.

