

Boosting Quote Amendment Efficiency by 92% Through a Custom Salesforce CPQ Solution

HIGHLIGHTS

92%

Increase in Efficiency of the
Amendment Process

90%

Reduction in Manual Quote
Generation Process

70-80%

Improvement in
Operational Efficiency

THE CUSTOMER

The customer is a leading US-based provider of cloud-based security and compliance solutions. They provide products and services tailored to assist organizations in identifying, prioritizing, and addressing vulnerabilities within their IT infrastructure. Their offerings span across multiple security domains, encompassing vulnerability management, threat defense, compliance oversight, and web application security.

THE CONTEXT

The customer was using Salesforce CPQ to give accurate prices for their products. This tool is great for quotes, but their team often needs to modify them later. However, the standard Salesforce CPQ setup doesn't allow easy transfer of item groups from the old quote to a new one, complicating contract adjustments.

If they have to rebuild quotes manually each time something changes, it's slow and error-prone. It's also hard to add or remove products, keep pricing right, and track what's been changed. This can cause delays and upset customers.

THE OBJECTIVE

The customer sought a tailored solution within Salesforce CPQ to effectively manage amendments while maintaining the hierarchical organization of quote lines. They wanted the solution to automate the identification and addition of quote lines during amendments, ensuring accuracy and efficiency in the quoting process.

THE SOLUTION

• Custom Formula Field

We created custom formula fields across the Quote Line Group, Quote Line, and Subscription entities to establish distinctive group IDs. These fields uniquely identify group IDs based on specific criteria such as product type, category, or custom attributes, ensuring the grouping structure remains intact during any changes.

Also, we configured these formula fields to accurately distinguish between quote line groups, ensuring consistency and reliability in the grouping structure.

• Apex Class

We developed an Apex class to manage the process of identifying and adding quote lines to the amendment quote. This class handled custom formula fields to ensure the accurate transfer of quote lines along with their respective groups.

Within the confines of the Apex class, we integrated logic to fetch quote lines according to their linked group IDs and seamlessly shift them to the corresponding slots within the amendment quote. Also, we included an error-handling mechanism to maintain data integrity throughout the process.

• Asynchronous Flow Invocation

We set up a process to automatically trigger the Apex class after creating the amendment quote. This ensures that the Apex class is activated once all quote lines are added, preventing errors and maintaining data integrity.

We designed an asynchronous flow to trigger the Apex class asynchronously after the amendment quote is created. This setup allows batch processing of quote lines added to the amendment quote.

Additionally, we set up the flow to manage any follow-up tasks or notifications. This helps track the completion status of the grouping preservation process.

• Solution Testing and Deployment

We tested the custom formula fields, Apex class, and asynchronous flow to verify their functionality and maintain the integrity of grouping structures during amendments.

Also, we rolled out the solution to a sandbox environment to undergo additional testing and gain user acceptance. Upon confirmation of its validity, we deployed the solution to the production environment, emphasizing the importance of thorough documentation and comprehensive training for end-users and administrators.

Following deployment, we monitored the solution to promptly address any issues and identify opportunities for ongoing maintenance and enhancement.

THE OUTCOME

With Grazitti's customized solution implemented within Salesforce CPQ, the customer was able to:

- **Achieve a 92% efficiency increase in the amendment process through automation.**
- **Boost operational efficiency by 70-80%, ensuring accuracy and customer satisfaction.**
- **Streamline the amendment process effectively while maintaining the grouping structures of quote lines.**