

HOW SOLVD HELPS YOU:

GATHERING, ANALYSIS, AND DESIGN

We'll meet with you and go through the basics of CPQ. There will be two meetings, one to demo the core functionality of CPQ and its best practices, and the second to gather necessary Product information and create a Master Product List that can be used to configure Products for CPQ.

INSTALL AND CONFIGURE THE SALESFORCE CPQ PACKAGE

We'll install and configure the Salesforce CPQ package in a Sandbox Environment and in Production.

PRODUCTS AND PRICING

We'll configure up to 50 Products into Salesforce with their accompanying prices.

BUNDLING

We'll configure 1 Product Bundle with up to 5 Product Features and 30 Product Options, and we'll train and enable you to create more Product Bundles on your own.

CONTRACT MANAGEMENT, SUBSCRIPTIONS, AND RENEWALS

We'll setup standard Subscription and Renewal management to automate your amendment and renewal processes.

DOCUMENT GENERATION

We'll create 1 Quote Template with basic styling so you can generate quote documents to send to your customers.

REPORTING

We'll update up to 3 current reports, and create up to 5 new reports to work with the CPQ data model and provide the visibility your business needs.

USER TRAINING

We'll conduct three, recorded training and with supplementary documentation on Quoting, Products, and Pricing, as well as on Amendments and Renewals. This will help your end users hit the ground running on go live and get the most value out of CPQ

CPQ ADMIN TRAINING

We'll conduct 3 recorded trainings with supplementary documentation on adjusting and managing the Quoting user interface, configuring and maintaining Products, creating Product Bundles, and configuring and maintaining pricing and pricing automation.

UAT AND DEPLOYMENT TO PRODUCTION

We'll do one round of user acceptance testing to make quick changes/updates based on user feedback. Larger items will be put in a backlog to be worked on post go-live if desired

POST GO-LIVE SUPPORT

Bucket of 10 hours for post go-live support, to be used or not used as needed

TIMELINE
6 WEEKS

PRICING
\$22,000

HOURS
110



5/5

Star Rating on the Salesforce AppExchange

SOLVD offers time-based billing. Pay only for what you need based on actual time spent. Our quick start offers a discount that results to a \$200/hr bill rate.

Allowing your company to be up and running quickly with your new system.