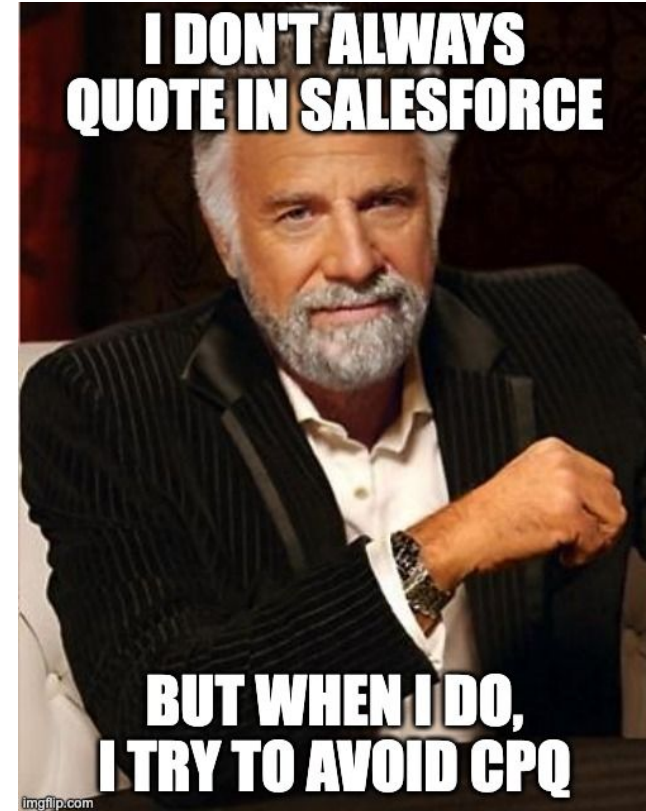# Advanced Salesforce Quoting Without CPQ
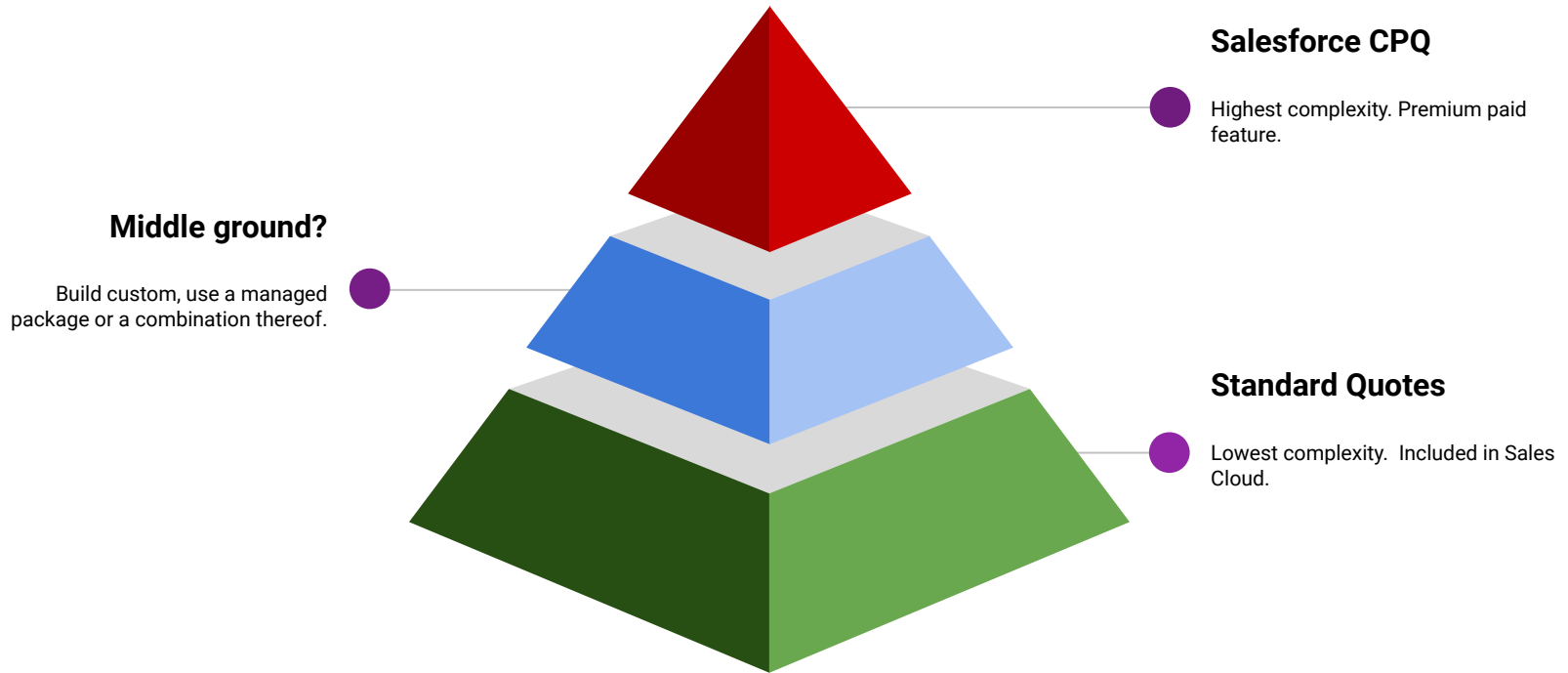
Svet Voloshin

Statement of Purpose

- Deepen your understanding of Salesforce Sales Cloud, its features and limitations
- Understand the use cases for Standard Quotes
- Learn how to extend its capabilities
- Realize that there is a middle ground between Standard Quotes and CPQ
- Evolve as a trusted Salesforce professional/advisor

What are my core quoting options in Salesforce?

Salesforce CPQ

Highest complexity. Premium paid feature.

Middle ground?

Build custom, use a managed package or a combination thereof.

Standard Quotes

Lowest complexity. Included in Sales Cloud.

Why Quote?

Producing quotes is an important part of the sales process for several reasons:

1. **Establishing Trust:** Quotes are a formal document that outlines the products or services being sold and their associated costs. By providing a detailed and accurate quote, businesses can establish trust with their customers and show that they are transparent and reliable.
2. **Closing Deals:** A quote is often the last step before a customer makes a purchase. By providing a detailed and accurate quote, businesses can increase their chances of closing the deal and winning the customer's business.
3. **Streamlining the Sales Process:** Producing quotes can help streamline the sales process by automating repetitive tasks, such as generating and sending quotes to customers. This can help sales teams save time and focus on other important tasks, such as building relationships with customers and closing deals.
4. **Providing a Basis for Negotiation:** A well-produced quote provides a clear starting point for negotiation with customers. By outlining the costs and terms associated with a product or service, businesses can have a more informed discussion with customers about their needs and expectations.

S-Docs INC
521 5TH AVE
NEW YORK, NY
10175

S-Docs Quote #1174

Prepared For:
Dynamic Solutions
2894 Woodlawn Drive
New Berlin, WI 53151
james@dynamicsolutions.com

Quote Details:
Quote #: 1174
Date: 7/31/2021
Valid Until: 8/31/2021

Project Description
S-Docs proposes to implement a comprehensive document generation and e-signature solution to solve efficiency problems across the business. The project will also include custom document design.

Quote Summary

Service	Description	Price	Qty	Total
E-Signature	Comprehensive e-sign for Salesforce	$16	20	$320
Document Generation	Comprehensive doc gen for Salesforce	$16	20	$320
Premium Support	Gold support package with web and phone	$12	20	$240
Template Design	Quote templates	$600	5	$3000
Template Design	Invoice templates	$600	5	$3000
Template Design	Reporting templates	$600	2	$1200
Template Design	Mailing label templates	$400	3	$1200
New Customer Discount	Thanks for choosing S-Docs!	-$1000		-$1000

Subtotal: $8,280
Tax Rate: 6.000%
Total Tax: $496.80
Grand Total: $8,776.80

Special notes, terms and conditions
Note that the prices quoted in this document are valid for one (1) month from the date this document was issued.
If the prices listed within this document are accepted, payment is due within thirty (30) days following the invoice being issued.
A charge of 1.5% will be placed upon late payments.

SIGN HERE _____ Head of Purchasing
SIGN HERE _____ Head of Sales

800-519-DOCS | 521 5th Ave, New York, NY 10175 | sales@sdocs.com

Salesforce Sales Process

1. **Lead Generation:** This is the process of identifying potential customers who may be interested in your product or service. Leads can be generated through a variety of sources, such as website visits, social media, and events.

2. **Lead Qualification:** Once leads are generated, the next step is to qualify them to determine whether they are a good fit for your product or service. This may involve assessing their needs, budget, and level of interest.

3. **Opportunity Management:** If a lead is deemed qualified, it can be converted into an opportunity. Opportunities represent potential sales and can be tracked in Salesforce.

4. **Sales Process:** The sales process in Salesforce typically involves several stages, such as needs analysis, solution design, proposal, negotiation, and closing. These stages can be customized to fit your business needs.

5. **Quoting:** Once an opportunity is at the **proposal or negotiation stage**, a quote can be generated using Salesforce CPQ. The quote includes a **detailed breakdown of the products or services being sold, their prices, and any applicable discounts or promotions**.

6. **Contract Management:** Once a deal is closed, a contract can be generated and managed in Salesforce. This includes tracking contract terms, renewal dates, and other important details.

Standard Quotes

- In Salesforce, standard Quotes are a feature that allows users to create **quotes for products and services** that they **want to sell** to their customers.

- Standard Quotes can be generated manually or automatically, and they can be customized with specific products, pricing, and other details such as payment terms and delivery information.

- Standard Quotes are **included with Salesforce Sales Cloud** and can be used to streamline the sales quoting process and improve sales team productivity.

What is Salesforce CPQ?

Salesforce CPQ is a software tool that helps organizations automate and streamline their sales quoting process. It enables businesses to configure products based on customer needs, set up pricing and discounting rules, and generate quotes automatically.

Salesforce CPQ also provides **contract management, integration with other Salesforce products, and robust analytics and reporting features**.

CPQ Main Features

The main features of Salesforce CPQ are:

1. **Product Configuration**: Salesforce CPQ allows you to configure your products based on customer needs and specifications.
2. **Pricing and Discounting**: Salesforce CPQ lets you set up pricing and discounting rules to ensure that your sales team offers the best pricing for your products.
3. **Product Bundling**: With Salesforce CPQ, you can create product bundles and offer them as a single solution to customers.
4. **Quote Generation**: Salesforce CPQ automates the creation of quotes by pulling together the configured products, pricing, and other relevant information into a professional-looking quote document.
5. **Contract Management**: Salesforce CPQ enables you to manage contracts throughout their lifecycle, from creation to renewal. You can track key contract details such as terms and renewal dates, and generate renewal quotes.
6. **Integration**: Salesforce CPQ integrates seamlessly with other Salesforce products, such as Salesforce CRM and Salesforce Billing, as well as third-party applications.
7. **Mobile Access**: Salesforce CPQ is accessible from mobile devices, enabling your sales team to create and send quotes on the go.
8. **Analytics and Reporting**: Salesforce CPQ provides robust analytics and reporting features that enable you to track your sales team's performance, identify trends, and optimize your sales process.
9. **Approval Workflows**: Salesforce CPQ enables you to define approval workflows for quotes and contracts, ensuring that the right people review and approve the right documents at the right time.
10. **Customization**: Salesforce CPQ is highly customizable, enabling you to tailor it to your specific business needs and processes.

CPQ vs. Standard Quotes

Feature	Salesforce CPQ	Standard Quotes
Product Configuration	Yes	Yes
Pricing and Discounting	Yes	Yes
Product Bundling	Yes	No
Quote Generation	Yes	Yes
Contract Management	Yes	No
Integration	Yes	Limited
Mobile Access	Yes	Limited
Analytics and Reporting	Yes	Limited
Approval Workflows	Yes	No
Customization	Yes	Limited

CPQ vs. Standard Quotes – continued…

Salesforce CPQ	Salesforce Standard Quoting
Robust subscription product capabilities	Introductory list pricing, discounting, and bundling features
Dynamic quote document generation	Basic quote documents generation
Multi-record product validation	Standard product validation
Automated contracts and quote renewals	A drag-and-drop quote template editor
Advanced discounting options like volume, multi-tiered, automatic, and partner/distributor	Very basic discounting
Subscription pricing	Discounts do not calculate before you save the record
Renewal Quotes with Subscription Products	No $ Discount only %
Layers for Discounting, Partners, Reps, Multi Products	
Custom product bundling	

CPQ vs. Standard Quotes - continued...

Salesforce CPQ offers several features that are not available in Standard Quotes, such as **product bundling**, **contract management**, **approval workflows**, and more robust analytics and reporting. Salesforce CPQ also offers greater customization options. Standard Quotes are included with Salesforce Sales Cloud and are a simpler, more basic quoting tool. They are suitable for businesses with **less complex product offerings and sales processes**.

When to use CPQ?

1. You have a **complex product catalog** with **many configuration options, pricing rules, and discounts**. Salesforce CPQ is designed to handle these types of scenarios and can help automate and streamline the quoting process.
2. You need to **manage contracts throughout their lifecycle**, from creation to renewal. Salesforce CPQ includes contract management features that can help you track key contract details and generate renewal quotes.
3. You want to **customize the quoting process** to fit your specific business needs and processes. Salesforce CPQ is highly customizable, enabling you to tailor it to your unique requirements.
4. You want to improve the productivity of your sales team by **automating repetitive tasks** such as **generating and sending quotes** to customers.
5. You want **more robust analytics and reporting features** to track your sales team's performance, identify trends, and optimize your sales process.

When to use Standard Quotes?

1. Your **product catalog is simple**, with **few configuration options**, pricing rules, and discounts.

    a. An example of a simple product catalog is a flat hierarchy.
    b. Prices are stored in Standard and Custom Price Books.

2. You **don't** need to **manage contracts** throughout their lifecycle.

3. You are looking for a simpler, more **basic quoting tool**.

4. You don't need a **high degree of customization** or integration with other Salesforce products.

CPQ Project Cost Considerations

The cost of a Salesforce CPQ (Configure, Price, Quote) project in the USA can vary widely depending on the scope and complexity of the project. According to some industry estimates, a typical Salesforce CPQ implementation can range from around **$50,000 to over $250,000 in the USA**, depending on factors such as the size of the organization, the number of users, and the **level of customization** required. It's important to note that these are just estimates, and the actual cost of a Salesforce CPQ project can vary depending on **many factors**.

*"Most enterprise implementations are probably going to end up with SOW's that are **6 - 9 months** ranging from **$250k - $500k**. It doesn't need to be that big, for anyone, and it could be much bigger and longer in some cases, but just based on what I tend to see, that is a reasonable ballpark, knowing nothing else about the client, their system landscape, or team that would be implementing it."*

- **An experienced CPQ Architect**

CPQ Implementation Duration Considerations

The **duration** of a Salesforce CPQ project **can vary** depending on the **complexity of the project** and the availability of resources. However, a typical Salesforce CPQ project can take anywhere from **several months to a year or more**, and involves stages such as project scoping, design and development, testing and quality assurance, and training and adoption.

Salesforce CPQ Competition

1. **Oracle CPQ Cloud**: Oracle CPQ Cloud is a cloud-based solution that offers similar capabilities to Salesforce CPQ. It includes features for product configuration, pricing and discounting, quote generation, and contract management.
2. **Apttus CPQ**: Apttus CPQ is a comprehensive quote-to-cash solution that includes features for product configuration, pricing and discounting, quote generation, contract management, and billing.
3. **PROS Smart CPQ**: PROS Smart CPQ is an AI-powered solution that offers advanced pricing and quoting capabilities, including dynamic pricing optimization and guidance.
4. **SAP CPQ**: SAP CPQ is a cloud-based solution that includes features for product configuration, pricing and discounting, quote generation, contract management, and integration with SAP ERP systems.
5. **Zoho CRM Plus**: Zoho CRM Plus includes a suite of sales and marketing tools, including a CPQ module that offers features for product configuration, pricing and discounting, and quote generation.
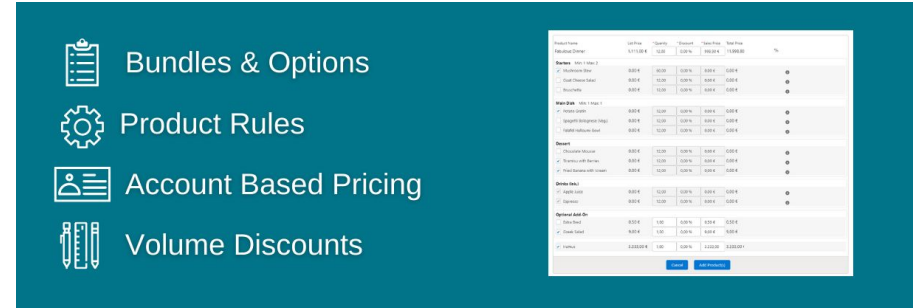
Feature Gap

- What if my project requires more advanced features than Standard Quotes can offer?
- What if Salesforce CPQ is overkill?
- What if I don't have the time, labor or funds to implement something really complex?
- Is there nothing *in-between*?
- All I need is some **"Advanced Quoting"** capabilities.

It's a... Feature... Gap!

THERE MUST BE A WAY.
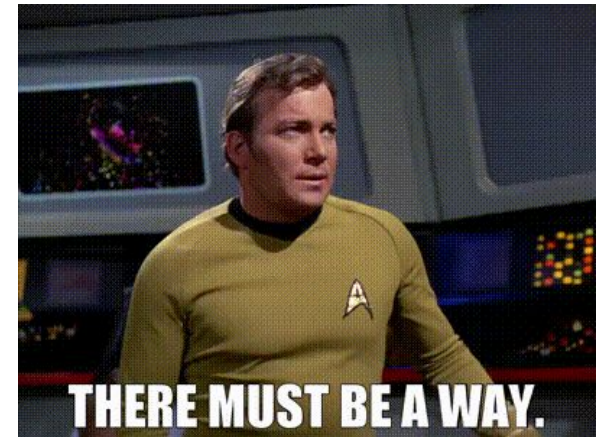
What is Advanced Quoting?

- Product Bundling
- Bundle Pricing
- Advanced Pricing
  - Tiered Pricing
  - Volume-based Discounts
- Discounting Rules
- Contracted Prices

Replicate CPQ Custom?

Here are some of the ways that Salesforce CPQ can be replicated:

1. **Custom Objects and Fields**: You can create custom objects and fields in Salesforce to capture additional data and information that is important to your business.
2. **Pricing and Discounting Rules**: You can code the pricing and discounting rules in Salesforce to reflect your unique pricing strategy and business needs.
3. **Quote Templates**: You can create custom quote templates that reflect your company's branding and design.
4. **Approval Workflows**: You can define custom approval workflows for quotes and contracts in Salesforce to reflect your company's approval process.
5. **Integrations**: You can customize integrations between Salesforce and other third-party applications, such as ERP or financial systems.
6. **Custom Calculations**: You can create custom calculations and formulas in Salesforce to reflect your unique business requirements.

Easy CPQ – formerly available on AppExchange

Easy-CPQ
By Admin's Helper
Easy but Powerful

⭐⭐⭐⭐⭐ 5 Average Rating ([6 Reviews](#))

Perfect example of certain CPQ features replicated custom.

Supported Features

`Native App` `Editable Code` `No Limits`

[More Details](#)

$15 USD/user/month
Discounts are available for nonprofits
[Pricing Details](#)

✔️ Bundles & Options
✔️ Product Rules
✔️ Account-Based Pricing
✔️ Volume Discount

Get It Now   **More** ▼

Overview   **Reviews**   **More Details**

Easy but Powerful
Admin's Helper

- 📋 Bundles & Options
- ⚙️ Product Rules
- 📇 Account Based Pricing
- 🎚️ Volume Discounts

Easy-CPQ

Easy-CPQ
Admin's Helper

⭐⭐⭐⭐⭐
"Efficiency = More Sales"
Andrew Russo

⭐⭐⭐⭐⭐
"Little Tool with Big Impact"
Stefan Schiborr

Crafted with care by a Berlin CTA

Try it out today!

Easy-Installation

- 🖱️ Flexible Components
- 🏭 Industry-Standard Configuration
- ⚙️ Free Configuration Service

Easy-CPQ

Custom Objects & Other Components

Custom Objects

- Option Category
- Contracted Price
- Advanced Pricing
- Product Option
- Pricing Tier

Other Components

- Apex Classes (~70)
- Custom Fields (~35)
- Lightning Pages (5)
- Tabs (5)
- App (1)
- List Views (3)
- Page Layouts (6)
- LWCs (20)
- Permission Sets (2)

Custom Tab on Quote

Easy-CPQ Details Related

🏷️ **Add Products (Easy-CPQ)**

Enter Search Text..

Name	Product Code	Product Family	Description	List Price
+ Apple Juice	FD-0010	Drinks	Our favorit drink	$35.00
+ Bruschetta	FD-0003	Bread	Fresh, fresh, fresh. The freshest!	$35.00
+ Chocolate Mousse	FD-0007	Dessert	Sweat treat for the sweatest customers.	$35.00
+ Espresso	FD-0014	Drink	Black and strong	$35.00
+ Extra Bread	FD-0011	Bread	German bread, you have to try!	$10.00
+ Fabulous Dinner	FD-0001	Dinner	Amazing dinner, best ingridient with lots of love prepared	$35.00
+ Falafel Haloumi Bowl	FD-0006	Falafel	As tasty as a Berlin Falafel	$35.00
+ Fried Banana with Ice-cream	FD-0009	Dessert	Icecream, not just during the summer	$35.00
+ Goat Cheese Salad	FD-0003	Salad	What more to say, goat cheese!	$35.00
+ Greek Salad	FD-0012	Salad	Olives, onions and the freshest salad	$10.00

First Previous Page 1 of 2. Next Last

Please select a product.

🏷️ **Quote Line Items (Easy-CPQ)**

Product	List Price	* Quantity	* Discount	* Sales Price	Total Price				
Fabulous Dinner	$35.00	1.00	0.00%	$35.00	$35.00		✏️	💾	🗑️
Mushroom Stew	$0.00	1.00	0.00%	$0.00	$0.00	ℹ️	✏️	💾	
Potato Gratin	$0.00	1.00	0.00%	$0.00	$0.00	ℹ️	✏️	💾	
Chocolate Mousse	$0.00	1.00	0.00%	$0.00	$0.00	ℹ️	✏️	💾	
Apple Juice	$0.00	1.00	0.00%	$0.00	$0.00	ℹ️	✏️	💾	
Greek Salad	$0.00	1.00	0.00%	$0.00	$0.00	ℹ️	✏️	💾	
Espresso	$0.00	1.00	0.00%	$0.00	$0.00	ℹ️	✏️	💾	

Product Option

Product Option
PRO-00000017

Edit | Clone | Delete | ▼

Related | **Details**

Product Option Name
PRO-00000017

Option Category ⓘ
Starters

Configured Product ⓘ
Fabulous Dinner

Sort Order ⓘ
10

Option Product ⓘ
Mushroom Stew

⌄ Settings

Option Type ⓘ
Component

Selected ⓘ
☐

Bundled ⓘ
☑

Required ⓘ
☐

⌄ Quantity

Quantity ⓘ
1.00

Min Quantity ⓘ

Quantity Editable ⓘ
☐

Max Quantity ⓘ

⌄ Pricing

Unit Price ⓘ

Discount Percent ⓘ

Discount Amount ⓘ

Option Category

Option Category
Starters

New Contact | Edit | New Opportunity | ▼

Details

Option Category Name
Starters

Configured Product ⓘ
Fabulous Dinner

⌄ Settings

Sort Order ⓘ
10

Minimum Options ⓘ
1

Maximum Options ⓘ
2

⌄ System Information

Owner
🐾 Svet Voloshin (Test)

Last Modified By
🐾 Svet Voloshin (Test) , 3/6/2023, 7:29 AM

Created By
🐾 Svet Voloshin (Test) , 3/6/2023, 7:29 AM

Product Options (3)

New

Product Option Name	Configured Product	Option Product	
PRO-00000017	Fabulous Dinner	Mushroom Stew	▼
PRO-00000018	Fabulous Dinner	Goat Cheese Salad	▼
PRO-00000019	Fabulous Dinner	Bruschetta	▼

View All

Option Categories UX/UI

Product Name	List Price	*Quanity	*Discount	*Sales Price	Total Price	
Fabulous Dinner	$35.00	1.00	0.00%	$35.00	$35.00	
Starters Min: 1 Max: 2						
☐ Mushroom Stew	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☐ Goat Cheese Salad	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☐ Bruschetta	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
Main Dish Min: 1 Max: 1						
☐ Potato Gratin	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☐ Spagetti Bolognese (Veg.)	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☐ Falafel Haloumi Bowl	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
Dessert						
☐ Chocolate Mousse	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☐ Tiramisu with Berries	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☐ Fried Banana with Ice-cream	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
Drinks (Ink.)						
☑ Apple Juice	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☑ Espresso	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
Optional Add-On						
☐ Extra Bread	$10.00	1.00	0.00%	$10.00	$10.00	
☑ Greek Salad	$0.00	1.00	0.00%	$0.00	$0.00	ⓘ
☐ Hummus	$9.00	1.00	0.00%	$9.00	$9.00	

Product Rules

CPQ Product Rules (Trailhead)

- CPQ product rules help ensure sales reps are putting together the right products and bundles every single time.

- You don't have to worry about checking whether products and options are compatible with one another, or whether a specific SKU is appropriate for your customer's business size and use case.

- We do that busy work so you can move quickly to deliver on the high expectations your customers hold for their buying experience.

CPQ Price Rules (Trailhead)

In addition to product rules, Salesforce CPQ price rules help control quoting and optimize sales. Price rules **automate price calculations and update quote line fields**. This feature is useful if your business contains products that change in response to the presence of other products on your quote.

Price rules will also contain **price conditions**. For instance, if you wanted to sell 2 ink cartridges with each printer, a price rule can ensure that if you increase the quantity of printers to 3, it will also increase the quantity of ink cartridges to 6.

Subscriptions (CPQ)

1. **Subscription Products**: Salesforce CPQ enables businesses to define products and services that are sold on a subscription basis. Subscription products can include a variety of items, such as software licenses, maintenance plans, and support services.
2. **Subscription Terms**: Businesses can define subscription terms, such as the duration of the subscription and the billing frequency (monthly, annually, etc.).
3. **Subscription Pricing**: Salesforce CPQ allows businesses to define pricing and discounting rules for subscription products. Pricing can be based on a variety of criteria, such as the length of the subscription or the number of seats.
4. **Renewals**: Salesforce CPQ includes renewal management features that enable businesses to manage subscription renewals and generate renewal quotes. Renewal pricing can be based on the original subscription price, with discounts applied for renewing customers.

Amendments (CPQ)

1. **Amendment Types**: Salesforce CPQ includes several types of amendments, including Renewals, Add-Ons, Upsells, and Downgrades. Each type of amendment is designed to support different types of changes to an existing quote or contract.
2. **Amendment Workflows**: Salesforce CPQ enables businesses to define workflows for managing amendments, including approval processes and automatic notifications.
3. **Amendment Pricing**: Amendments in Salesforce CPQ can include changes to pricing, such as adding or removing products, adjusting quantities, or applying new discounts.
4. **Amendment Contracts**: Salesforce CPQ includes contract management features that enable businesses to manage amendments to contracts throughout their lifecycle, from creation to renewal.
5. **Amendment Reporting**: Salesforce CPQ provides robust reporting and analytics features that enable businesses to track amendments, identify trends, and optimize their pricing and bundling strategies.

Renewals (CPQ)

Renewals in Salesforce CPQ (Configure, Price, Quote) refer to the process of renewing an existing contract or subscription. Renewals enable businesses to continue generating revenue from existing customers, while also providing customers with a convenient and predictable way to continue using products or services.
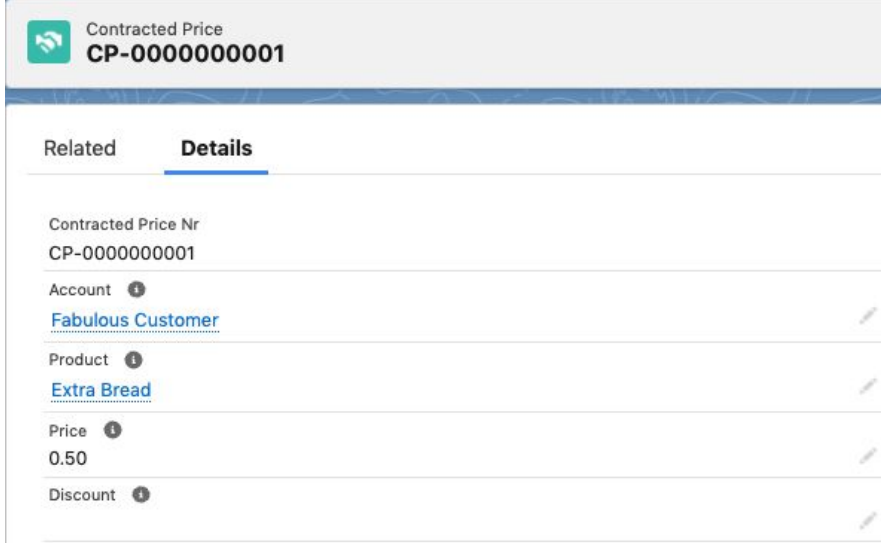
Here are some key features of renewals in Salesforce CPQ:

1. **Renewal Management**: Salesforce CPQ includes contract management features that enable businesses to manage the entire renewal process, from creating renewal quotes to finalizing renewals.
2. **Renewal Pricing**: Salesforce CPQ enables businesses to set up pricing and discounting rules for renewals, such as offering discounts for renewing customers or for longer-term renewals.
3. **Renewal Notifications**: Salesforce CPQ can be configured to send automatic renewal notifications to customers and sales teams, helping to ensure that renewals are completed in a timely manner.
4. **Renewal Reporting**: Salesforce CPQ provides robust reporting and analytics features that enable businesses to track renewal rates and identify opportunities for improvement.
5. **Contract Amendments**: Salesforce CPQ enables businesses to make changes to contracts during the renewal process, such as updating pricing or adding new products or services.

Contracted Price

In CPQ

- Contracted price is the **agreed-upon price** for a product or service **between a business and a customer**, defined in a contract or service agreement.

- Contracted prices can be managed through contract management features in Salesforce CPQ, which enable businesses to track contract details such as pricing, terms, and renewal dates.

- By managing contracted prices in Salesforce CPQ, businesses can ensure that they are meeting the terms of their contracts, and that they are providing customers with accurate and consistent pricing.

- Salesforce CPQ also enables businesses to set up pricing and discounting rules based on a variety of criteria, such as customer type, product type, and quantity, enabling businesses to offer customized pricing and discounts to specific customer segments.

- Accurate management of contracted prices in Salesforce CPQ can help increase customer satisfaction and loyalty, optimize revenue and profitability, and maintain consistent pricing for contracted customers.

Contracted Price
CP-0000000001

Related | **Details**

Contracted Price Nr
CP-0000000001

Account
Fabulous Customer

Product
Extra Bread

Price
0.50

Discount

In Easy-CPQ

Tiered Pricing

- In Salesforce CPQ, tiered pricing can be set up using price rules that define different price levels for different quantity ranges.
- For example, a business might offer a price of $10 per unit for quantities up to 100, but offer a lower price of $8 per unit for quantities above 100.
- By using tiered pricing in this way, businesses can incentivize customers to purchase larger quantities and reward high-volume customers with lower prices.

Quote Templates

- [Salesforce CPQ quote templates](#) are configurable and even somewhat complex
- [Standard Salesforce Quote Templates](#) are also configurable, but they are much more limited in their scope
- Easy CPQ does not offer Quote Template configuration capability, as it relies on Standard Salesforce Quote Templates

Thank you!

Stay tuned in the Slack channel for the next topic and please feel free to suggest areas of interest.

Ways to get in touch...

Connect with me on LinkedIn
Email: svet@dc3me.com

Obvious People Slack Channel:
#salesforce-academy

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