

I.T. SECURITY COMPANY ADDS SALESFORCE CPQ ENHANCEMENTS TO SPUR ADDITIONAL GROWTH

The client company focuses on managing the performance and availability of applications across cloud computing environments as well as inside the data center.

INDUSTRY: ONLINE SERVICES
SERVICES: APPLICATION PERFORMANCE MGMT.

BUSINESS CHALLENGE SUMMARY

The client is a long-standing Salesforce CPQ customer that needed a little extra help building their Add-On Early Renewal deals and on-premise-to-SaaS conversion deals into the system.

The client was not using CPQ amendments and renewals up to this point so not only did ATG need to assist with the design and build of the specific scenarios but also had to implement and guide renewals best practices.

The client had created a custom ordering solution that needed to be removed and replaced with out-of-the-box CPQ ordering functionality. This would mean that users no longer contracted deals from the Opportunity but from the Contract instead.

Since the client is so mature in its development, often times adding significant changes have notable impacts. This is why they utilizes ATG's Expert Services to have that extra layer of expertise formulating design and implementing build.

ATG SOLUTIONS & TOOLS

IMPLEMENTATION SERVICES

ATG provided a solution design that utilizes CPQ best practice, leveraged out of the box processes and functionality and supported implementation of the solution in production.

ATG configured Salesforce CPQ Contract Amendment functionality from the Opportunity object to align the client with Salesforce CPQ Best Practices and out of the box functionality for conversion and swap use cases.

ATG supported the creation of guardrails and application functionality to ensure users were performing amendments as intended.

ATG enabled Advanced Order Management for CPQ as a replacement to the existing customization that creates Orders from Opportunity and Quote.

ATG created custom lookup values to link Quote Line Records during AOER use cases to preserve original Order information.

RESULTS & IMPACTS

Successful go-live for Salesforce CPQ Enhancements with minimal to no impact to Production productivity.

Optimized Salesforce CPQ's potential by incorporating in Renewals and Amendments.

Streamlined the CPQ build by removing Ordering customization and incorporating out of the box functionality.

Reduced the need for manual conversions and manual add-on early renewals which reduced the opportunity for human error.