

Developed a custom app in Salesforce to automate and cut quote creation time by more than 80%

About the Client

01

Headquartered in London, UK, the client is a global partner in digital marketing, transformation, and digital business

02

It combines agency services with consultancy, training, and cutting-edge technologies to deliver the best possible outcomes for its customers

03

It has offices spread across EMEA, the US, India, and South Africa

Business Needs

Build a tailored app to choose products and generate quotes

Implement integration with Google Sheets to retrieve product prices and resource plans

Integrate the following features in the app

- Region/Country-based pricing automation (multi-currency)
- Order creation and linking to Salesforce opportunity
- Discounting/margin
- Product-based approvals
- One-click quote generation from a custom app

Solutions

Built a custom app in Salesforce and automated the quote creation process by customizing Salesforce CPQ

Integrated the custom app with the following features:

- Certinia for finance and billing
- Google Sheets for price and resource plan configuration
- Custom objects for pricing multiplier and currency exchange rates to support multicurrency (with exchange rates) based on the billing country

Developed and deployed product module hierarchy within the application and Salesforce quotes

Worked on order creation cloning within the application, including discounting and quote creation

Created custom email templates for notifications

Simplified resource allocation to manage resources more efficiently

Implemented integrations to provide user/profile-specific access to different functionalities



Tech Stack



Business Impact

- Automated end-to-end workflow from product configuration to quote generation within one Salesforce app
- Deployed a custom-enriched UI
- Minimized manual intervention
- Minimized reliance on switching between multiple systems/applications
- Reduced quote creation time by over 80%
- Boosted Salesforce user adoption by over 60%
- Reduced manual calculations to 0
- Automated dynamic price fetching from Google Sheet calculators within the Salesforce app, with automatic application of region and country-based exchange rate pricing multipliers
- Ensured better reporting and order visibility
- Eliminated the need for code changes for new products by making the entire pricing mechanism configuration based

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