Kenandy

Salesforce CPQ Integration

Configure, Price, Quote (CPQ) solutions such as Salesforce CPQ (formerly Steelbrick CPQ) are rapidly becoming an indispensable part of Sales' toolkit as they look to close bigger deals faster. With CPQ, Sales can rapidly customize orders by rapidly configuring the right product option across a large number of possible variables. This is an especially important challenge to solve as a company's products and services lists grows. CPQ software also helps ensure Sales has the most up to date pricing available for their product configurations, in the process streamlining and speeding the quoting and order workflow.

Increase the value of CPQ by integrating with ERP

Integrating CPQ solutions with ERP provides crucial "back office" information that further helps Sales close deals more quickly and profitably. This information includes:

- Inventory availability and "available to promise" (ATP) dates
- Available manufacturing capacity
- Logistics and shipping timelines
- Customer credit information so Sales can best structure quote terms for each customer.

Additionally, integrating CPQ with ERP allows for Sales to seamlessly flow quotes directly into the Order-to-Cash process to speed the fulfillment of products, invoicing of customers, as well as the collection and accounting of cash. Without this integration, the transfer of quotes from CPQ solutions to ERP solutions risks Order-to-Cash process errors that can lead to lost revenue and dissatisfied customers.

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Integrating Salesforce CPQ with Kenandy Cloud ERP

The easiest approach to integrating Salesforce CPQ to ERP is to integrate to Kenandy Cloud ERP. Kenandy is the only ERP provider to have pre-built a complete integration to Salesforce CPQ. Since both Salesforce CPQ and Kenandy Cloud ERP are built on the Salesforce Platform, the user interface and work flow processes are common and seamless across both applications.

By contrast, integrating Salesforce CPQ with other leading ERP solutions requires 3rd party middleware and complex database to database translations. The process can be time consuming, expensive, difficult to maintain and error prone. For users, an additional challenge is the need to learn different systems as well as navigate across different user interfaces (UIs) as quotes in Salesforce CPQ are transitioned to orders in the ERP solution.

Process Flow Between Salesforce CPQ and Kenandy Cloud ERP
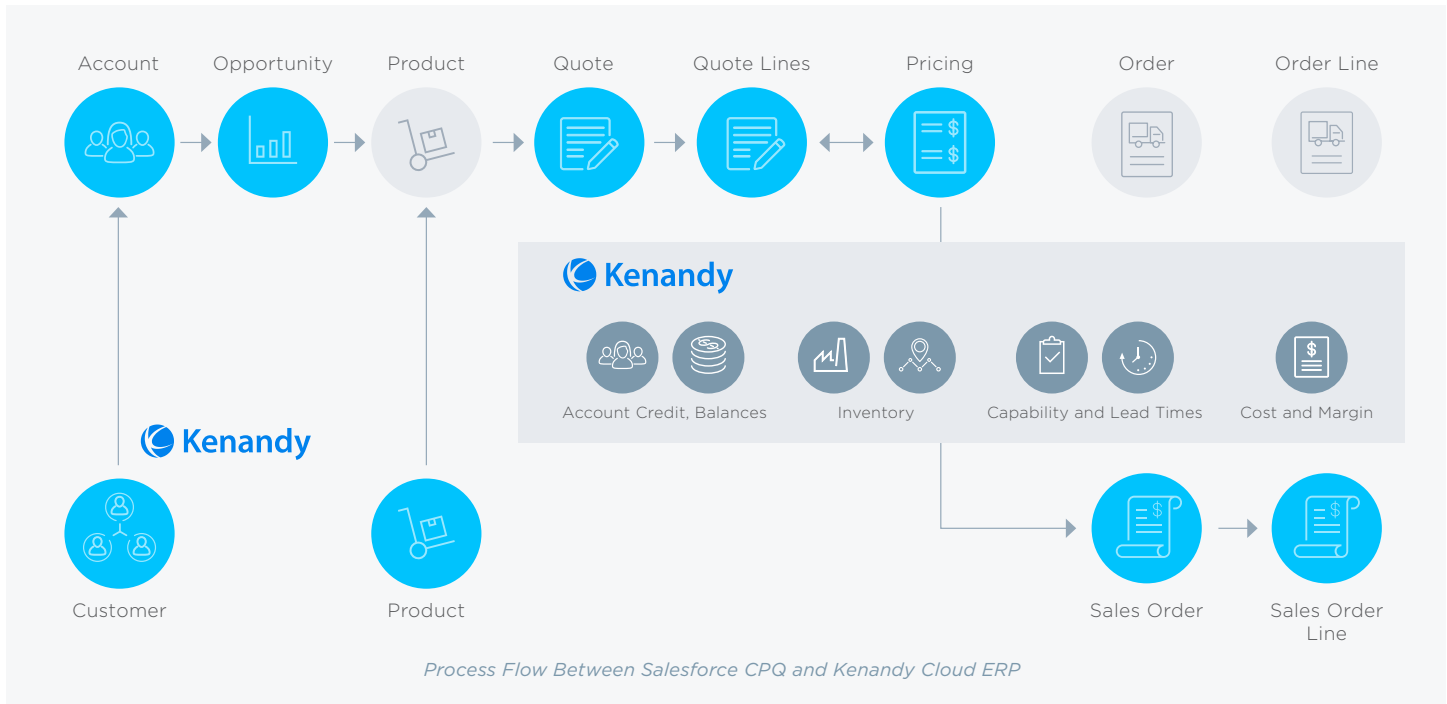
Process Flow Between Salesforce CPQ and Kenandy Cloud ERP

Once the simple integration process is complete, the bi-directional process flow from Salesforce CPQ to Kenandy Cloud ERP is seamless, as shown in the figure. Product inventory, capacity and availability, customer credit information and balances from Kenandy Cloud ERP are made available to the quoting screens in Salesforce CPQ. Upon completion of the quoting process, opportunities, quotes, and quote lines are created in Salesforce CPQ and pushed to Kenandy Cloud ERP sales order and sales order lines. To complete the Order to Cash process, the orders are processed, fulfilled, shipped, invoiced and cash collected within Kenandy Cloud ERP. The process completes when inventory is updated and made available to Salesforce CPQ for the next quoting cycle. The whole process is completely seamless. Users cannot tell which application they are working in as they run through the complete quoting to order-to-cash process.

Benefits of Integrating Salesforce CPQ to Kenandy Cloud ERP

For Salesforce customers, integrating Salesforce CPQ with Kenandy Cloud ERP offers the opportunity to run their business end-to-end on the Salesforce Platform. As a result, customers can take advantage of Salesforce platform services including scalability, elasticity, security, collaboration and mobility, among others, for all aspects of their business. In addition, this integration:

- Saves on the cost of expensive integrations to legacy or other non-platform ERP systems

- Delivers a fast ROI given the quick integration

- Provides a seamless, familiar user experience

- Increases quote margins

- Improves customer satisfaction from better inventory, availability and delivery information

- Enables Sales to close larger deals faster and with greater confidence

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