



ITequality CPQ Offerings

DISCOVERY	QUICKSTART	FULL IMPLEMENTATION
Review Standard Objects	✓	✓
Review Custom Objects, Integrations, Code		✓
Pre CPQ Salesforce Enhancements		✓
Review Quoting, Templates, & Contracts	✓	✓
Initial Installation of CPQ	✓	✓
CONFIGURATION		
Bundles, Options, & Configuration	1 bundle, 5 options	3 bundles, 10 options
Data Load as Needed		✓
Quick Action for Quote Creation	Out of box only	✓
Customizing the Quote Line Editor*	Out of box only	✓
2 Product Rules, 2 Price Rules **		✓
System Security	✓	✓
TEMPLATES		
Custom Template with Custom Design & Page Settings	Out of box only	✓
2 Quote Terms & 2 Term Conditions		✓
Custom Line Column, Logo, & Watermark		✓
CONTRACTS		
Custom Field Values on Contract Generation	Out of box only	✓
Customization for Renewal Process	Out of box only	✓
Automate & Customize Amendment Process	Out of box only	✓
DEPLOYMENT		
Project Update Meeting Length	1 hr updates	1 hr updates
Project Management, Documentation, & Knowledge Transfer	✓	✓
Align Existing Sales Data Entry with New CPQ Process		✓
Deploy Work to Production	✓	✓
Training	3 hr training	3 hr training
Post-Go Live Support		✓
COST	\$17,000	\$50,000

THE FOLLOWING ADD-ON ITEMS ARE AVAILABLE FOR AN ADDITIONAL PRICE:

Salesforce Standard Approvals, 15 Criteria • Advanced Approvals • Advanced Order Management • E-Signature • Conga • 3hrs/Additional Price Rule, 3 Entry Criteria & 2 Actions (includes Deployment) • Existing Salesforce Permission Changes • Price Dimensions (MDQ Products) Selling Yearly, with Ramp-Up Pricing • 3hrs/Additional Product Rule, 3 Entry Criteria, & 2 Actions (includes Deployment) • Conditional: Quote Lines, Quote Terms, & Template Sections

* Includes the following Field Sets: 1 Quote, 1 Quote Line, 1 Product & Custom Product Filter dropdown.

** Includes 3 Entry Criteria & 2 Actions