

CPQ DATASHEET



Workbooks CPQ enables organisations to simplify and automate complex quotation processes, empowering sales teams to build quotations quickly and accurately, using a guided quotation process.

Workbooks CPQ is fully integrated into the Workbooks platform, enabling you to manage complex pricing and configuration from Opportunities, Quotations or Order records.



GUIDED SELLING

Create tailored quotation screens to simplify and drive consistency across the quoting process, capturing key configuration questions and options.

Guided selling allows you to move away from pricing catalogues, product codes and options. It also enables quick and easy on-boarding of new sales people.



PRODUCT & PRICING

Manage your products and pricing directly in Workbooks CPQ with support for the concept of different pricing books and pricing rules. The combination of these features allows you to support: Volume based pricing, bundle pricing, customer specific pricing, regional pricing, channel pricing, etc.

It is also possible to integrate Workbooks CPQ with your ERP, Finance or E-commerce platform, enabling you to synchronise pricing and product information with other systems within your business.



CONFIGURATION MANAGEMENT

Ability to guide your sales teams through the process of selecting the right combination of products and options, using configurable items – ensuring only the right configuration options are available.

Workbooks CPQ's rules allows you to cater for complex configurations. Rules and calculations are stored in one place for use wherever they are needed.



PRODUCT AND BILL OF MATERIALS

Workbooks CPQ enables you to create Products and a Bill of Materials at the same time, allowing you to present a simplified product offering to your clients, whilst maintaining a comprehensive Bill of Materials (BOM) to support your manufacturing or delivery processes.



NO CODE AND LOW ADMINISTRATION

You can build screens and workflows using a WYSIWIG editor and build your pricing and configuration rules using screens and options. However if you have very complex requirements, these can be implemented by the Workbooks professional services team.





INTEGRATION WITH THIRD-PARTY SYSTEMS

Workbooks CPQ can be integrated directly with your other business applications such as ERP, E-commerce or Accounting systems. This enables you to push or pull product and pricing information to support your sales processes. It can also be used to push through orders and bill of materials into the manufacturing process – driving revenue growth.

BENEFITS



Increased quoting capacity



Zero errors and omissions



Sales team operational 24/7



Channel partners and communities collaborate