



# CASE STUDY

# CPQ

# Configuration



# CPQ Configuration Case Study

## Challenge:

A Clinical Research Organization that is currently using CPQ needing to build out a pricing structure based on current capacity and demand.

The client required automatic pricing calculations for products listed in their current price catalog, based on various environmental factors. These factors needed to be dynamic, adjustable in real time, and should not require intervention from a Salesforce Admin.

## Solution:

MC4 Solutions began the requirements gathering process to understand the factors influencing pricing and the overall use case. We also reviewed the delivery of quotes and the Conga templates in use. It was determined that these templates needed updates to accommodate the new configuration changes. Throughout the design and development process, we provided multiple demonstrations of the pricing calculations to ensure they met the requirements and were thoroughly tested by the users.

MC4 Solutions configured several product and price rules to handle the pricing calculations based on dynamic factors. We developed a front-end section for the product team to easily update these factors across all applicable products. Changes to the values did not affect existing quotes with these products but applied to new quotes moving forward from the time the changes were made.

## Outcome:

The client could now update products from the front end based on environmental changes that drive quoted product prices. Pricing was automated, eliminating the need for manual intervention.

During the project, we faced an unexpected additional requirement to enable price overrides for specific customers. However, only certain users were authorized to perform these overrides, necessitating a robust solution to ensure proper access control and maintain pricing integrity.

To address this challenge, we took the following steps:

### **1. Custom Field Creation:**

We created a custom field specifically for price overrides. This field was designed to be accessible only by users with the appropriate permissions, ensuring that only authorized personnel could make changes.

### **2. Permission Set Configuration:**

We established a permission set that granted access to the custom field. This permission set was assigned only to users who were authorized to perform price overrides, providing a secure and controlled environment for managing overrides.

### **3. Updating Configuration Rules:**

We thoroughly reviewed and updated all relevant configuration rules within Salesforce CPQ. These updates were necessary to incorporate the logic for the new override functionality. The rules were modified to check for the presence of the override field and validate the user's permissions before allowing any price changes.

These 5 key takeaways emphasize the benefits of dynamic pricing, automation, user-friendly interfaces, and thorough testing in developing effective pricing strategies for CPQ systems.

#### **1. Importance of Detailed Requirements Gathering:**

Understanding the specific factors influencing pricing and the client's overall use case is essential for developing a solution that accurately meets their needs.

#### **2. Dynamic Pricing Capabilities:**

Implementing dynamic, real-time pricing adjustments based on environmental factors can significantly enhance the accuracy and responsiveness of pricing strategies.

#### **3. Automated Pricing Calculations:**

Automating pricing calculations based on current capacity and demand reduces manual effort and minimizes the risk of errors, leading to more efficient and reliable pricing.

#### **4. Thorough Testing and Validation:**

Regular demonstrations and thorough testing during the development phase are crucial to ensure that the solution meets the client's requirements and functions as intended.

#### **5. Client Empowerment:**

Enabling the client to manage pricing adjustments independently empowers them to respond swiftly to market conditions and business needs.



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