

Streamlines Quotes, Invoices, and Revenue Management

aMind's Salesforce CPQ & Billing implementation optimize CPQ core processes.



Background

Industry: Chemical Processing
Headquarters: Westlake Village, CA
Founded: 1902
Salesforce CPQ and Billing
Billing Methods: Mix of subscription, perpetual, one-time

CPQ and Billing Challenges

SAFER Systems' costly and inefficient sales and billing systems were overdue for an update. The company's executive team selected Salesforce CPQ and Billing software and aMind implementation services to:

- Curtail revenue leakage from manual quoting and billing processes and poor renewal management.
- Establish a single source of truth for historical and ongoing AR/billing and revenue. Comply with ASC 606 revenue recognition standards.
- Lay the groundwork for an integrated quote-to-cash solution.
- Rapidly introduce new offers to keep pace with dynamic customer and market expectations.
- Eliminate swivel-chair quoting and ordering for greater productivity.
- Improve revenue tracking and forecasting by replacing error-prone spreadsheets.



aMind was incredibly diligent in helping us navigate our CPQ and Billing project. They brought a high level of both domain and technical expertise and worked very well with our team. The result was an on-time/on-budget delivery of Salesforce CPQ and Billing.



– Ionel Nechiti, General Partner / SAFER Systems



Salesforce CPQ and Billing Software

aMind delivers an end-to-end quote-to-cash solution.



Channels
Internal sales



Countries
North America



Integration
ERP (Sage)

Salesforce CPQ

- 12,000+ products augmented with CPQ and billing information, tax and revenue rules and treatments to drive behavior from quote-to-cash across SaaS and legacy subscription, perpetual software license, hardware, warranty and support and onetime and recurring professional services.
- Integration of contract, asset and subscription creation/management processes into CPQ flow.

Salesforce Billing

- Revenue recognition schedules automatically created on order product activation for ratable recognition over the course of the associated contract term.
- Standard tax integration and rates automatically apply sales tax and GST based on order delivery address.
- Invoices generated on-demand from orders based on activated lines and reviewed, approved and posted.
- Manual payment creation and allocation.

Conga Quote Generator for Salesforce CPQ supports customer-facing proposals with product-specific terms and conditions.

Conga Invoice Generator for Salesforce Billing sends documents via email or upload to customer portal.

Salesforce Platform Validations and Automations

Data Migration for more than two years of historical data was loaded into Salesforce CPQ and Billing to permit a single source of truth across customer purchase history, orders, invoices and revenue.

Salesforce CPQ & Billing Modules



CPQ

- Quote Proposals
- Approvals
- Orders
- Contracts
- Reporting



Billing

- Orders
- Contracts
- Approvals
- Invoices
- Revenue Schedules
- Revenue Transactions
- Reporting



aMind's team of implementation pros truly drove this program in a systematic and professional way. Thank you for working so diligently with our team.



– Eric Fishman, President / SAFER Systems



CPQ and Billing Results

Today, SAFER Systems has a complete end-to-end quote-to-cash solution on Salesforce.

Salesforce CPQ and billing modules support SAFER Systems software, hardware and professional services products. The company's offerings include a mix of subscription, perpetual and one-time pricing models. Here is how SAFER Systems uses Salesforce across their organization:

Internal Sales create quotes for a mix of products and services, optionally grouping by one or more sites that roll up under a single corporate account. SAFER Systems has the ability to optionally specify line-level discounts depending on product-specific controls and present proposals to customers.

Sales Operations now closes won opportunities in two ways. The first is to establish a new contract or corporate level agreement that covers multiple accounts or sites. Sales can also co-terminate to an existing contract.

Order and Billing Operations manages sales orders by tracking order and line item details such as delivery, tax and freight and activating upon delivery. SAFER Systems can now easily generate, review and post invoices and generate and distribute customer invoice documents.

Billing Operations and Controllers post cash and non-cash payments and allocate to invoice lines.

Finance reports on AR/Billing and aging, deferred revenue and forecast and cash posting. In addition, the finance department can easily close finance periods and extract the financial transaction data required to feed the general ledger in Sage software.