

Customer Success

aMind Implements Salesforce CPQ and Billing for DealerOn

Streamlines quotes, elevates product upsells, automates complex billing and improves customer satisfaction.



Background

Industry: Technology
Headquarters: Rockland, MD
Founded: 2004
Salesforce CPQ and Salesforce Billing

Business Challenges

DealerOn is a private company that delivers digital services to car dealerships. In high growth mode, DealerOn needed to automate and streamline configure, price, quote and billing processes by bringing CPQ, Billing and Accounting onto Salesforce. The company faced several challenges:

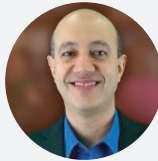
- A very high touch sales process had few guardrails.
- Cross and upsells were dependent on deep account knowledge.
- Every single quote had to be manually reviewed.
- Complex monthly invoices that encompassed expansive car dealer partnerships were tracked through spreadsheets.
- Internal sales and billing processes were time-consuming and error-prone.

DealerOn wanted to address these challenges using Salesforce CPQ and Salesforce Billing out-of-the-box as much as possible. Requirements included:

- Quotes for retail customers with discounting rules and processes in place to reduce back office validations.
- Products must be flexible and ordered monthly with elastic pricing based on customer spend for digital services. While not traditionally a usage product, usage was leveraged to provide flexibility.
- Finance required the ability to easily report on a wide array of critical financial metrics.
- Exposure to valid upsell/cross sell options during sales cycle to increase the average sales size.
- Finance teams must be able to tailor billing and invoicing rules by customer without implementing a new complex process per customer.



The aMind team demonstrated solid functional and technical abilities spanning all of Salesforce CPQ and Billing. They integrated well with our team and were able to efficiently help us prioritize our requirements and have set us up for successful implementation of Salesforce CPQ and Billing.



– Amir Shahmiri, COO / DealerOn

DEALERON



Countries
North America



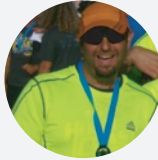
Channels
Internal Sales
Customer Service
Sales Operations
Financial Reporting



Integration
Accounting Seed

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The ability to reuse existing Salesforce out-of-the-box functions and create new custom features without implementation of code was critical to success. Not only did we deploy faster, but we set Salesforce up to minimize maintenance expense and make expansion straightforward for DealerOn.



– Neil Belstock, Engagement Manager / aMind Solutions



Salesforce Solution

aMind led the project with a small team from DealerOn.



Salesforce CPQ

Quote Proposals
Approvals
Orders
Contracts
Payments



Salesforce Billing

Orders
Contracts
Approvals
Invoices
Revenue Schedules
Revenue Transactions
Payments
Credit Memos/Refunds

Out-of-the-Box

- Quotes
- Orders
- Contracts & Subscriptions
- Advanced Approvals - quotes and credit notes
- Conga Quote and Invoice Generation
- DocuSign for Quotes
- Invoices and Credit Notes
- Payments and Refunds
- Consumption-based quoting and billing

Extensions

- OEM Specific proration and billing rules
- Journal Entry integration from SF Billing to - Accounting Seed General Ledger
- Summary Invoices" - 100's of invoices presented and paid as one by an OEM
- Finance-accurate Aging" - effective-as aging information for accurate reporting
- Fully-automated renewals process