

Salesforce Price Quoting

Extend your native Salesforce quoting capabilities to partners and speed deal closure



Impartner's Salesforce Price Quoting solution extends native Salesforce™ price quoting capabilities to partners. This channel-friendly price quoting tool allows partners to create co-branded, opportunity-based price quoting to end users -streamlining the overall process and taking the weight off deal desks so partners can accurately, confidently and quickly move forward with closing deals instead of waiting for quotes.

This solution is ideal for Impartner PRM customers using Salesforce CRM who don't have a Configure Price Quote (CPQ) solution

key features:

- 1** Partners may create quotes directly on the partner portal through integration with Salesforce CRM price books.
- 2** Branded PDF or shareable HTML link is created as a result of quote creation which partner may pass along to potential customer
- 3** Quote approval and expiry—if partner requests special pricing on quote, initiate approval process and keep partner apprised of status.
- 4** Product SKU search—make it easy for partners to find the right products to quote.

Quote Name	Expiration	Upfront Cost	Monthly Cost	Quote No.	Term	Quote URL	Status	# of Views	Primary
<input type="checkbox"/> Optional Config	07/31/2018	\$1,110.00	\$466.56	00225759	48	Go to quote	Draft	0	
<input type="checkbox"/> Demo Quote	07/31/2018	\$4,738.50	\$165.25	00225465	36	Go to quote	Needs Review	2	✓

How it Works:

Price Quoting allows partners a self-service option to retrieve pricing and create a quote for an opportunity to pass along to the end user. A partner will be able to enter an open opportunity record from the partner portal and generate a quote on their own, without any waiting period, intervention, approval, or assistance required from the vendor (when pricing is within standard terms).

The Product and Services SKUs can be grouped into 3 categories, filtering the SKU type to provide a guided selling experience that aids the partner in selecting the appropriate SKU. Each category produces a SKU selection popup, enabling the selection of one or multiple product/service SKUs and quantity values. Up to 3 filters are configured in each category to further narrow down the results. All values for selection are pulled from the Salesforce CRM Product Catalog. Additional fields, categories, and filters may be configured upon request.

Partners may even create and save multiple quotes per opportunity record and select which version is the primary one that will be sent to the potential customer.

The screenshot displays the 'Quotes' section of the Impartner interface. At the top, there is a 'Quotes' header and a link to learn more about the quoting tool. Below this is a 'Create Quote' button. The main part of the screenshot is a table with the following columns: Quote Name, Expiration, Upfront Cost, Monthly Cost, Quote No., Term, Quote URL, Status, # of Views, and Primary. A single row is visible with the following data: Demo Quote, 07/31/2018, \$1,125.00, \$176.33, 00225465, 36, [Go to quote](#), Needs Review, 0, and a checkmark in the Primary column. Below the table are two buttons: 'Deliver Selected Quotes' and 'Ask For Quote Assistance'. Below the quotes section is a 'Contacts' section with a table containing one contact: John Smith, VP of Sales, Sales, john@demo.com, and 877-555-5555.

Quote Name	Expiration	Upfront Cost	Monthly Cost	Quote No.	Term	Quote URL	Status	# of Views	Primary
Demo Quote	07/31/2018	\$1,125.00	\$176.33	00225465	36	Go to quote	Needs Review	0	✓

First Name	Last Name	Title	Role	Email	Phone
John	Smith	VP of Sales	Sales	john@demo.com	877-555-5555

Find out more!

We'd love to show you more about how Impartner PRM can accelerate your channel. [Request a Demo](#) today.