

Retail Case Study

Products/Services Offered – High-end furniture, lighting, and design products



Business Challenges

- What problem was the client facing?

The client was struggling with inefficient quoting and pricing processes, leading to delays in generating quotes, inconsistent pricing structures, and difficulty in managing custom product configurations.

- Key pain points before using Salesforce CPQ:

- 01 Manual quoting process causing delays and errors
- 02 Lack of pricing automation for standard vs. customized product dimensions
- 03 Difficulty managing inventory and pricing for configurable products
- 04 Inconsistent discounting and approval process leading to revenue leakage



Solution Provided

- 01 Configured dynamic pricing rules for different product widths (Standard, Customized, Wall-to-Wall Carpets)
- 02 Created formula fields and price rules to calculate total cost based on area (Length × Width)
- 03 Implemented Quote Line Editor (QLE) to enable real-time pricing updates
- 04 Set up partner discounting logic within the Quote Line
- 05 Developed automated approval workflows for special pricing requests
- 06 Integrated inventory tracking to ensure accurate stock availability



Results & Impact

- ✔ 50% reduction in quote generation time
- ✔ 20% improvement in revenue accuracy by eliminating pricing errors
- ✔ 30% increase in sales team efficiency due to automated workflows
- ✔ Seamless order-to-invoice process with Salesforce Billing integration





Get Involved

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