

Configure Price Quote

Configure Price Quote (CPQ) by CallidusCloud does more than automate the quote and proposal process. CPQ provides you with pricing behavior intelligence to help determine pricing trends. See what products are selling most, to whom, when, and at what price.

Requiring only a browser, CPQ by CallidusCloud allows you to quickly configure, price, quote, propose, and sell your offerings from any device. Whether you sell direct, business to business or through ecommerce, you can respond to your customers on their timelines.

Sell faster with a robust catalog and rules-driven configurator

Users can easily search for the right product and compare against similar products with centralized product and pricing information. Eliminate or minimize expenses associated with publishing and distributing price lists. Give everyone in the process access to current information.

Prevent sales reps from selecting incorrect product configurations or prices to avoid lengthy delays and costly errors. Automatically make sales reps, partners, and customers aware of add-ons, options, and special promotions to increase deal size.

Make it easier for sales reps and customers to find what they are looking for. As they specify what they need, the software narrows down the list of applicable products. Users can find the right products and options with side-by-side comparisons and analyze detailed product specifications while highlighting up-sell and cross-sell suggestions.

Empower Sales Managers with automated approval workflow and reporting

Automate and streamline the approval process while protecting margin throughout any negotiations. Different criteria can be set to trigger an approval, such as exceeding discount, gross margin thresholds, or selecting non-standard terms. Quotes that do not trigger an approval are automatically approved to speed up quote delivery. Since sales reps can always see margin health, delays in non-standard discounts and negotiations are minimized.

Uncover performance data insights through easy-to-use reporting tools, and make better business decisions. Get real-time status at a glance by using dashboards that display your key performance indicators. With the CPQ by CallidusCloud intuitive drag-and-drop ad hoc reporting tool, you can quickly build your own reports. And, you can take advantage of prepackaged security, workflow, compensation reports, and sales performance analytics by role.



Key benefits:

Harness Valuable data from your CPQ

Understand average selling price, discounting, and margin health. Track manager approval speeds.

Sell more, faster

Empower sales reps with discounting guardrails and automated approval workflow.

Improve customer experience

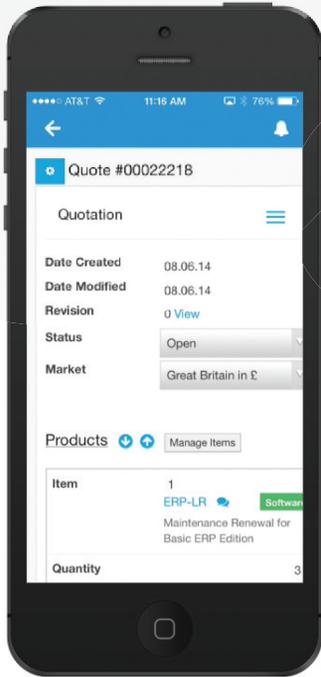
Prepare or edit quotes in front of the customer from any mobile device.

“Ask the Expert”

Feature educates sales at the point of execution. Sales can respond to customers with accurate, timely information.

Support multi-tier pricing and e-commerce

Sell your solutions globally in any currency and language.



Generate quotes on the go

Create quotes and proposals with just one click

Make product selections and pricing in seconds. Quotes can be delivered to customers through a secure link, which they can accept and turn into an order immediately. Electronic feedback and acceptance along with automated approvals significantly eliminate unnecessary delays and shorten the sales cycle.

Automate the creation of high-quality documents based on approved templates, content files, and pricing rules. Automatically merge customer, product, and other data into a consistent professional looking document. DocuSign integration allows you to have customers sign off on quotes.

Streamline order management

Streamline the entire order management process by allowing sales reps, channel partners, and customers to select the right products. Seamlessly convert those products to orders with a click of a button. Handle customer and subsidiary-specific pricing and multiple contracts per part number. When quoting based on assumed consumption, it's easy to track orders against a customer's volume obligations. Out-of-the-box integration to Salesforce.com, Oracle, Microsoft Dynamics, NetSuite, and leading ERP solutions keeps the forecast and inventory accurate.

Quote anywhere, anytime with CPQ mobility

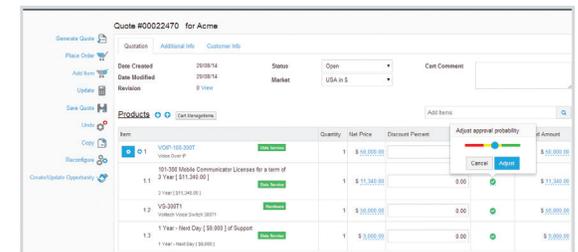
Sales reps are mobile and need access to all their integrated tools while on the go. Having CPQ on mobile devices enables sales reps to prepare quotes at customer meetings and potentially shave

days off the sales cycle. With CPQ by CallidusCloud, sales reps have a choice of mobile access:

- Apple iOS Native app
- Salesforce1 app

The Salesforce1 integration extends the Salesforce.com system, providing a one-stop-shop for all the tools needed to maximize revenue, drive sales performance, and improve productivity. The Salesforce1 app will pull in key opportunity and customer information from Salesforce.com, making quoting easy!

Both the Salesforce1 and iOS native CPQ app have the exact functionality, and similar look and feel as its desktop counterpart. Whether the sales rep is updating an existing quote, or creating a new quote, sales reps can access a product catalogue with millions of SKUs, receive up-sell and cross-sell alerts, and see real-time estimated compensation – all from their mobile device.



Margin health monitoring made easy

About CallidusCloud

Callidus Software Inc. (NASDAQ: CALD), doing business as CallidusCloud®, is the global leader in cloud based sales, marketing, learning and customer experience solutions. CallidusCloud enables organizations to accelerate and maximize their lead to money process with a complete suite of solutions that identify the right leads, ensure proper territory and quota distribution, enable sales forces, automate configure price quote, and streamline sales compensation — driving bigger deals, faster. Over 4,600+ leading organizations, across all industries, rely on CallidusCloud to optimize the lead to money process to close more deals for more money in record time.