Extending the Value of Salesforce with Quote-to-Cash Apps

Given the huge gap between CRM and ERP processes, capturing and transferring details on what products customers bought at what price and for what payment terms, as well as who approved the deal and how much in commissions is due, can be a challenging task. Failure to bridge this gap can lead to lower revenue, delayed deals, and smaller margins. Learn how Apttus Quote-to-Cash, aided by Xactly compensation management, DocuSign electronic signature and Jitterbit cloud integration, can help you close the CRM to ERP gap all inside Salesforce.

What applications encompass an automated process that closes the CRM to ERP gap?

For most companies, it’s a convoluted journey to turn opportunities into real revenue that gets captured in ERP systems. Multiple processes, non-integrated systems and the prevalent use of Microsoft Office make it difficult to ensure you are capturing detailed order data and booking revenue correctly. With Apttus, Xactly, DocuSign and Jitterbit, it’s a seamless and straight path from quote to cash, all within the Salesforce platform. Companies that have deployed this end-to-end system are experiencing bigger deal size, faster sales cycles and more accurate orders. In fact, one customer expects to increase their overall renewal revenue by $100 million every single year by using these applications in tandem.
Streamlining the Quote-to-Cash Process

The Apttus Quote-to-Cash suite is built on the Salesforce platform to empower sales, legal, sales operations and finance teams to have a comprehensive end-to-end application to collaborate and drive more profitable deals. Apttus Quote-to-Cash is comprised of Configure Price Quote (CPQ), Contract Management and Revenue Management. AppExchange partners Xactly, DocuSign and Jitterbit are seamlessly enabled throughout the Apttus Quote-to-Cash solution to fully close the CRM to ERP gap.

How can I manage the proposal process to optimize revenue?

“With our partner apps, we can take the Apttus Quote-to-Cash environment to the next level to make sure that the deal is profitable, that compensation is accurately tracked and used as an incentive, and help drive the actual signature and internal workflow management.”

— Ray Hein, SVP, Apttus

Apttus CPQ handles simple and complex quoting configurations with include/exclude rules, price lists, price tables, the ability to configure promotions and more, so sales reps no longer have to dig through mounds of spreadsheets to find appropriate product and pricing data. The solution supports multichannel sales scenarios, including direct and indirect sales, partners, distributors, and even e-commerce/website-driven sales. The product catalog gets uploaded into the system so upsells, cross-sells, promotions, guided selling and advanced pricing models are all supported.

If the sales team is always on the road, quoting process and approvals will not get slowed down, as Apttus supports mobile and offline access.
How can you minimize the work associated with contracts and protect against risks?

Apttus Contract Management enables legal and sales operations teams to fully manage the contract process. The system handles non-disclosures, contracting and renewals all within Salesforce. Since most contracts are written in Microsoft Word, Apttus links very closely to Microsoft Word and also incorporates Salesforce Chatter, delivering embedded collaboration to the contract negotiation process. This works well for both the sales side and the buy side of contracts. Other features such as search and standard clause libraries easily enable the reuse of content to save time during contract development.

How can you better manage revenue recognition?

Apttus Revenue Management helps manage revenue recognition policies from a compliance perspective, making sure that rebate structures are managed and all fees and prepays are captured on time. The system produces revenue schedules with planning scenarios and ties into back-end ERP and billing systems.

How do you offer the right deal?

The process is pretty simple. Using the fictitious San Francisco Cookie Company as an example, Sales sees that there is a November opportunity with a local business.
Since the product catalog is embedded into the system, clicking on the proposal button will bring up a set of categories: cookies, cakes and breads (see screenshot below). As the sales rep selects products and configures a quote, the system brings the items into a cart which also provides guided selling and feedback. Guided search or guided selling functions help to quickly create a quote for simple or complex product catalogs.

Users can easily add more products to the quote or look at totals, where they may see different types of charges such as usage charges, frequency charges or any type of charge or pricing model that addresses company needs. The system shows the extended list price, the adjusted price and the full quote so sales can put the quotes together in a matter of minutes and then move on to analyzing the impact to their compensation and/or drive it towards the e-signature process.

![Screenshot of product catalog and proposal system](image)

**When sales reps are creating their quotes, how can you make sure they can see the impact the sale has on their commissions?**

Sales reps by nature are motivated by money and by letting them know exactly what their commission is for a particular deal, while they are still in the midst of proposing it, is a great way to guide their behavior.
“The whole idea is integrated sales incentives. Sales incentives should not be some sort of a spreadsheet done after the fact – after the deal is closed. It should be that every single day a rep should be logging in and seeing how he or she is doing.”

— Scott Barmmer, VP, DocuSign

Embedded into Apttus Quote-to-Cash, Xactly lets sales reps know how much money they’re making on a deal as they are setting up their orders. The system configures and manages SPIFs, contests and other incentives.

At any given point, the sales team can log in and see how much money they are making, how they are tracking towards goal and how they are doing in comparison to other reps on the team.

“When a sales rep is putting together a deal in Apttus and working on configurations or bundles the company is encouraging him to sell, he can see what the commissions are by just clicking a button. The rep could then even re-configure the quote another way to see how he may increase commissions, perhaps by moving a different product line and adding a kicker on top of it. Each time a rep updates the quote in Apttus, incentive estimates are updated, all within Salesforce. On the Xactly dashboard within Salesforce, reps can see how well they are doing towards making Club or in comparison to other team members.

In the example that follows for the San Francisco Cookie Company, the rep sees that by closing this deal he will go from 51.09% of goal for the quarter to 51.34%.
How can you manage signatures electronically?

There is always a point in a transaction when the document gets sent off for signature and the waiting begins. Reps need to make sure that the people who need to sign — either internally or externally — know the documents are there for them to sign. With DocuSign embedded into the Apttus Quote-to-Cash system, sales has the visibility to see whether someone has received, opened and signed the document.

A click of a button allows any object in Salesforce to be e-signed (see screenshot below). Within Apttus, once quoting is complete and the proposal created, a simple click of a button allows DocuSign to produce a fully executable, very easy to understand document without any additional work. When the solution puts forth the items that need to be signed or filled out, it makes sure that the process doesn’t move forward until all needed items are filled out, which is a good thing since as much as 30%-40% of signed documents are not in good order, meaning missing dates or signatures. A simple click of a button executes the signature and a status bar of the signing process keeps the rep informed.
How do you integrate the order data with ERP?

With the approved order ready to go, transferring the data to an ERP system to manage operational fulfillment and billing can be a painful integration exercise. With Jitterbit, embedded into the Apttus Quote-to-Cash system, the order information can be easily submitted to back-office applications.

Jitterbit integrates a myriad of back office applications with Salesforce from vendors such as SAP, Microsoft, Oracle and others. Within Apttus, Jitterbit provides a very easy visual design tool that maps all Quote-to-Cash processes and data. The ERP system receives information from Apttus about the agreement, collecting different line items from the order and submitting that information via APIs. Information from the ERP system such as the sales order ID, unique identifier, shipping information, order status, etc. gets displayed either in batch or most often in real time within Salesforce.

The entire process can be managed in real time using Jitterbit’s web management console, accessible on any device or browser. Jitterbit can synchronize all data or move a subset of pertinent information back into Salesforce.

“Connecting to your ERP system is an ongoing process. So whenever you submit any kind of new information either into Salesforce.com or your ERP system, we simply make sure that all of that information is synchronized either in real time or every few hours.”

— Andrew Lee, V, Products, Jitterbit
Conclusion

Closing the CRM to ERP gap is essential for companies determined to maximize revenue and improve visibility and control over sell-side business processes. By leveraging the Salesforce platform with Apttus Quote-to-Cash and AppExchange partners Xactly, DocuSign and Jitterbit, customers can realize bigger deal size, faster sales cycles and more accurate orders.

About Apttus

Apttus delivers Quote-to-Cash, category-defining software that drives the vital business process between the buyer’s interest in a purchase and the realization of revenue. Apttus is delivered on the Salesforce Platform, the world’s most trusted and comprehensive cloud delivery infrastructure. Applications include Configure-Price-Quote (CPQ), Proposal Management, Renewals, Contract Management and Revenue Management. Additionally, Apttus’ patent pending X-Author technology enables Microsoft Office to be a user-interface with full interaction and control between Salesforce and Microsoft Office. Apttus is based in San Mateo, California, with additional offices in London, UK and Ahmedabad, India. For more information visit: apttus.com.