

The ICT Resellers Checklist: The Must-Have Features In a CPQ Platform



The ICT Resellers Checklist of Must-Have Features In a CPQ Platform

- ❑ Out of the box, full integration with Vendors (e.g. Cisco) and Distis (e.g. TechData, Ingram Micro, Weston Comstor, others)
- ❑ Scalability to incorporate 30,000+ line items
- ❑ Unify BoMs of any format, complexity or currency, integrated into one quote
- ❑ Maintain the smooth integration of multiple bills of materials (BoMs), preserving the complex architecture of the data
- ❑ Easily create multiple versions of a quote for sales
- ❑ Ability to include in a quote, quantity based line items (such as hardware) alongside duration- based line items (Contract and Subscription)
- ❑ Multi-currency management, simple processing of bills of materials (BoMs) of various currencies, into one quote in currency of your choice, with API exchange rate integrated into the quoting platform
- ❑ Grouping items by category, site, vendor, deployment phase, for easy review and approval
- ❑ Evaluate with ease, contracts & subscriptions statuses, accessible for immediate assessment and processing
- ❑ Access catalog of items already used in the past to shorten future quoting
- ❑ Ensure quote compliance with your customers' agreed discounts
- ❑ Real time business insights for optimized pricing and configuration

- ❑ Link pricing to opportunities, ensuring the quick process of opportunities alongside the pricing terms when they come up
- ❑ Interactive visibility & accurate forecast of your margin, while you work on the quote; control discounting, markups
- ❑ Maintain control over which person has access to edit specific fields, restrict editing of fields of your choice
- ❑ Simple approval processing of your quote, enable all stakeholders a quick workflow
- ❑ e-Signature Integration for fast approval flow
- ❑ Customized, personalized, professional templated quotes for quick approval
- ❑ Have access to the VIP rebate percentage that's associated with each SKU at any outstanding opportunity so you can see the latest potential VIP rebates, while creating your quote. This will allow you to react quickly and close more deals
- ❑ Easily customizable to the logic and workflow of your business

These capabilities, on one quoting platform, creates an all-inclusive solution that resolves the challenges of quoting as a VAR of ICT. They can only be provided by an Industry specific quoting solution, designed uniquely for VARs of ICT.