

ORACLE CRM ON DEMAND INTEGRATION WITH ORACLE CPQ CLOUD



Integrated with



THE WORLD'S MOST COMPREHENSIVE CRM ON DEMAND SOLUTION

- Easy to use for high user adoption
- Deploys quickly with little IT investment
- Embedded marketing, sales and service best practices
- Powerful and easy to use real-time and historical analytics
- Works online or offline

KEY FEATURES

CPQ CLOUD

- Streamline Opportunity-to-Order Process
- On Demand Architecture
- Integrated to CRM
- Ordering with ERP Integration
- Easy to Implement, Easy to Maintain

Integrated with Oracle CRM On Demand, Oracle CPQ Cloud solutions enable customers with complex products and multiple sales channels to streamline the entire opportunity-to-quote-to-order process, including product selection, configuration, pricing, quoting, ordering, and approval workflows.

Seamless Integration

The tight integration of Oracle CRM On Demand and Oracle CPQ Cloud enhances the value customers can enjoy with opportunity-to-order process seamlessly integrated within a world-class CRM solution.

- Streamline multiple hand-offs for approval with automated workflow
- Eliminate redundant data re-entry into multiple systems
- Decrease time to respond to customers
- Reduce error-prone quotes
- Minimize manual, time intensive proposal generation
- Maintain consistent quote & proposal formats
- Automated update of CRM system with quote & order information
- Track quote success rate, improve forecasts and sales reporting
- Capture missed cross-selling & up-selling opportunities
- Eliminate manual, inconsistent product configurations

Streamlines the Entire Opportunity-to-Quote Process

Enables Oracle CRM On Demand customers with an easier process to convert their opportunities into realizable and faster orders that will ultimately lead them to sell more with the following features.

Product Selection

Quickly select products to add to quotes and proposals:

- Search for products by descriptions, part numbers or SKU
- Answer guided selling questions to narrow product choices
- Quickly add products to quotations

KEY FEATURES

- Product Selection
- Price & Quote
- Proposals
- Maintenance Renewal Quoting
- CRM Integration
- Order Management & ERP Integration
- Guided Selling
- Configurator

Price & Quote

Streamline the pricing process:

- Apply customer, channel, and product-specific prices
- Apply advanced pricing and discounting rules based on multiple parameters across multiple product lines
- Cost-based pricing and estimating
- Generate and manage quotes with many line items
- Capture key sales management and forecasting data in real time: stage, competitors, close dates, and probability of winning

Proposals

Speed the generation of high-quality, customized proposals:

- Cover letters, quote summaries, terms & conditions
- Up-sell options such as recommended services & spares
- Customize and brand proposals for specific products, channels, and customers, each with unique content
- Generate proposals in Word, Adobe Acrobat, or HTML

Maintenance Renewal Quoting

Generate renewal quotes from CRM or ERP assets:

- Automated service and support contract renewals
- Renewal line items from ERP or CRM are automatically added to quotes
- Eliminates pricing errors
- Easily extend, repackage, or renew contracts with new effective dates

CRM Integration

Provide one solution for the entire Inquiry-to-Order process:

- Automatically update your Oracle CRM Opportunity with Quote & Product Line Item information for accurate sales reporting
- Reduce duplication of data

Order Management & ERP Integration

Easily submit orders online with full integration to existing business systems including CRM & ERP:

- Automatically convert quotes to orders
- Customize order forms to capture all required order data
- Approve orders via customized workflow

Guided Selling

Select the optimal product to meet customer requirements:

- Enter specifications and requirements to search for right product based on multiple parameters
- Review product and model profiles that include pictures, data sheets, drawings, and other supporting documents
- Support complex, needs-based selection capability

Configurator

Configure the product with the appropriate features and options to meet customer needs:

- Choose desired features and options and display relevant pricing
- Constrain choices using compatibility rules and valid combinations
- Guide the user with recommendations, help tools, and calculators
- View lead time and availability based on configuration
- Generate bills-of-material (BOM) and routings
- Support complex calculations and engineering algorithms
- Build dynamic part numbers based on configuration
- Write, test, and maintain rules with a simple, browser-based interface

Bottom Line





Only Oracle enables direct integration to Oracle CPQ Cloud from the CRM On Demand application to convert your hard-won opportunities into orders by helping you to create accurate and faster quotes from and within Oracle CRM On Demand. It provides a unified solution for the entire inquiry-to-order process by automatically updating the opportunity revenues while eliminating redundant and manual order submission process to external systems. With accurate forecasts, increased cross-sell and up-sell opportunities which all help your sales reps to sell more.



CONTACT US

For more information about Oracle CRM On Demand, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.

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Integrated Cloud Applications & Platform Services

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