Prodly™

Ensuring Accurate, SOX-Compliant Salesforce CPQ Deployments

Using Prodly's Salesforce CPQ deployment templates, Toast can quickly and compliantly update its product catalog—with fewer interruptions to the sales team.

toast | Industry: High Tech

Quick, accurate, and compliant Salesforce CPQ deployments are critical to Toast's ability to successfully keep its product catalog up to date and empower its sales team. When the company needed to scale up its capabilities while remaining in compliance with SOX regulations, it implemented Prodly DevOps.

Using Prodly DevOps, Toast is able to adhere to SOX regulations while running fast, accurate Salesforce CPQ deployments. As a result, its business systems team is now able to tackle more work during sprints and update product SKUs faster and with higher quality.

"I see Prodly DevOps as a valuable tool for many public companies using Salesforce."

— **Alex Abdou**, Director of Quality Assurance and DevOps
Toast

Benefits at a glance
• Delivering updates and new SKUs in Salesforce CPQ to the sales team in a fraction of the time without errors

• Saved three months on Enterprise Territory Management implementation

Challenges
• Toast's business systems team needed to perform quick, accurate, and fast Salesforce CPQ deployments while remaining in compliance with SOX regulations.

Solution
• Toast implemented Prodly DevOps, reducing the need for time-consuming, manual data migration work and automating change tracking for SOXz compliance.

Results
• Using the pre-built automations for Salesforce CPQ in Prodly DevOps, Toast was able to easily and quickly release error-free changes to products and pricing, which increased their agility. In addition, Prodly's automatic compliance features provided them with peace of mind during an external SOX audit. Building on these results, they were able to finalize their Enterprise Territory Management implementation in less time than it would have taken using a data loader.

Automation That Ensures Accuracy and Compliance

After Toast went public in 2021, it needed a solution to deploy Salesforce CPQ configuration data while complying with SOX regulations to track all changes and enforce segregation of duties. Considering the company's rapid growth, the software also needed to be scalable.

Previously, Toast's business systems team had used a manual data loader for CPQ configuration data changes. However, due to the highly complex nature of object relationships in Salesforce CPQ, this was time consuming, required too many resources, and was challenging to track. Furthermore, the team had to duplicate efforts across its release pipeline, which periodically resulted in production issues.

Data set automations are reusable sets of instructions that identify which object data to copy from a source to a destination environment. They can be easily customized for unique needs, and using them eliminates the risk of mistakes from missed or duplicated Salesforce CPQ configurations.

"By using Prodly DevOps along with a more structured release pipeline and schedule, we've been able to minimize the number of bugs that make it to production," said Abdou. "Prodly's automation dramatically reduces the likelihood of issues. In the event an issue does occur, we can catch it in a sandbox before it reaches production and affects our sales team."

> ## "Partnering with Prodly has allowed us to greatly increase our agility so we can continue to fulfill our mission… for years to come."
>
> — **Alex Abdou**, Director of Quality Assurance and DevOps
> Toast

As Alex Abdou, Director of Quality Assurance and DevOps at Toast, explained, "Prior to Prodly, when we deployed a Salesforce CPQ change to production, there was likely to be an issue. We process thousands of quotes per day, so any downtime directly affects our sales team. And the potential impact to revenue is meaningful. We really needed an automation tool that could ensure accuracy."

"We considered multiple tools, but it was clear from the outset that Prodly DevOps was the market-leading Salesforce CPQ deployment tool," Abdou continued. "We were already impressed with Prodly's pre-made automations for CPQ. The fact that the tool offers automated SOX compliance features such as change tracking and segregation of duties cinched the deal."

Fast, Efficient, and Error-Free Salesforce CPQ Updates

After implementing Prodly DevOps, Toast's business systems team has been able to make updates to Salesforce CPQ and release new SKUs faster and with a high degree of accuracy.

Instead of having to manually migrate CPQ changes to each environment in the pipeline, the team can complete their work and hand it off to the release team. They can then automatically promote it for testing and subsequently into production using Prodly's pre-built data set automations.

Increased Velocity and Agility

Toast is constantly innovating to push the restaurant industry forward, and Prodly helps scale Toast's Devops team's capacity to help support this focus on new products and solutions.

"We're dedicated to creating new offerings that help restaurants navigate these uncertain economic times," said Anisha Vaswani, CIO at Toast. "To do this, we make judiciously chosen investments in technology that enables us to drive innovation for the restaurant industry."

Thanks to the increased velocity and agility afforded by using Prodly DevOps, the Toast business systems team are now able to complete more user stories—and deliver a higher ROI—per sprint. As Vaswani said, "Leveraging Prodly has allowed us to greatly increase our agility so we can continue to fulfill our mission as the restaurant industry's trusted technology partner for years to come."

Peace of Mind During External SOX Audits

Prodly DevOps automatically tracks the when, what, who, and why of every change made in Salesforce CPQ. Having so much critical data at their fingertips has given the business systems team peace of mind when faced with a routine external SOX audit.

The team can easily share a report of every deployment made with Prodly with their auditors. Then, when asked about a specific change, they can quickly pull the approval history associated with that deployment. "This is very convenient and saves a lot of hassle," said Abdou. "I see Prodly DevOps as a valuable tool for many public companies that use Salesforce."

Accelerating Sandbox Seeding With Prodly DevOps

Toast's business systems team doesn't just use Prodly DevOps for CPQ releases. They also leverage its sandbox seeding capabilities—and not only for Salesforce CPQ.

They rely on standardized test data throughout development to test changes across Salesforce and multiple apps. Prodly DevOps has proven to be faster than a manual data loader, as well as Toast's internally-developed tool. As Abdou shared, "Prodly enables us to seed sandboxes with far fewer resources in a short period of time."

Enterprise Territory Management

Toast's business systems team were so pleased with Prodly DevOps, they decided to use it for their Enterprise Territory Management implementation.

"Setting up territories is highly involved, so we performed a lot of work in lower-level environments and used Prodly DevOps to push it to production," said Abdou. "It was awesome. We only had to do the setup once—and then we were able to quickly push the releases up through the pipeline to production. Prodly DevOps allowed us to complete the implementation three months sooner than we otherwise could have. When implemented correctly and used by a team that's undergone Prodly's onboarding, Prodly DevOps is an investment in compliance and quality—plus, it saves man hours."

"Prodly DevOps allowed us to complete our Enterprise Territory Management implementation three months sooner than we otherwise could have."

— **Alex Abdou**, Director of Quality Assurance and DevOps
Toast

REQUEST A PERSONALIZED DEMO
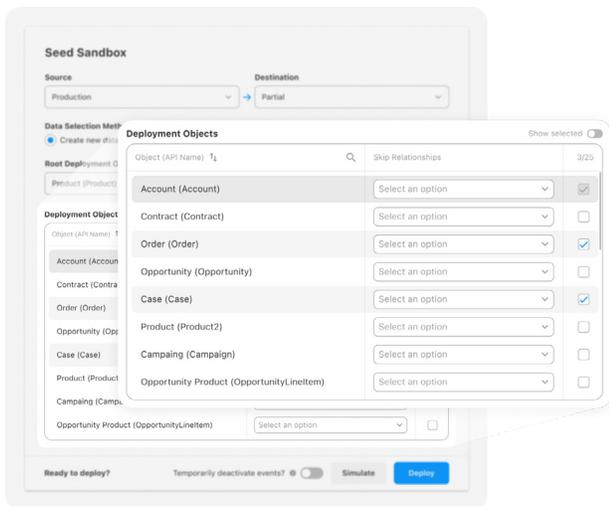
Learn more about **Prodly Sandbox Management** and **Prodly DevOps**!

Prodly

prodly.co   1.650.761.4876