

BreezyCPQ - Product Overview

Simplified Configure, Price, and Quote app for Salesforce-native Quote objects, bundle configuration, discount guardrails, and PDF proposals.

What it does

- Native Quote and QuoteLineItem objects for standard Salesforce reporting
- Quote builder embedded on the Opportunity record
- Product catalog with BreezyCPQ Standard pricebook
- Bundle options-required and optional add-ons on parent products
- Line-level discounts with max-discount guardrails and manager approval
- Primary quote sync to Opportunity Amount
- Branded quote PDF generation inside Lightning

Quote workflow

Browse the product catalog and configure bundles:

BreezyCPQ product catalog

 **BreezyCPQ Product Catalog**

New Product

Name	SKU	List Price	Bundle	
Breezy Platform	BZ-PLATFORM	\$12,000.00	✓	▼
Onboarding Package	BZ-ONBOARD	\$2,500.00		▼
Premium Support	BZ-SUPPORT	\$1,800.00		▼

Build quotes on the Opportunity record:

Quote builder with line items and discounts

Bundle Options: Breezy Platform

Back to ProductsAdd Option

Child Product	Required	Default ...	Min	Max	Sort	
Onboarding Package	✓		1	1	1	1 ▼
Premium Support			1	0	3	2 ▼

Generate and send branded PDF proposals:

Generated quote PDF preview

BreezyCPQ Quote

Quote 2026-06-28 15:37

Account: Acme Corporation

Opportunity: Acme Platform Renewal

Status: Approved

Product	Qty	Unit Price	Total
Breezy Platform	1	\$12,000.00	\$12,000.00
Onboarding Package	1	\$1,500.00	\$1,500.00
Premium Support	2	\$2,800.00	\$5,600.00
Subtotal:			\$19,100.00
Total:			\$19,100.00

Generated by BreezyCPQ

- Draft - editable quote
- Pending Approval - discount threshold exceeded
- Approved - ready to send or generate PDF
- Sent - delivered to customer

Permission sets

- BreezyCPQ Admin - admins and RevOps who configure products and pricing rules
- BreezyCPQ Manager - deal desk / sales managers who approve high discounts
- BreezyCPQ User - sales reps who create and edit quotes

Your Salesforce admin assigns the appropriate set to each user.

Install summary

Deploy from the BreezyGTM GitHub repository. The package enables Quotes and creates a BreezyCPQ Standard pricebook. Assign permission sets, add the Breezy Quotes component to Opportunity pages in the BreezyCPQ app, and start quoting.

Trial and consulting

Companies can install BreezyCPQ for a free 30-day trial. BreezyGTM also offers consulting on setup and customization.

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