

Altera Digital Health

Customer Success Case Study



Global healthcare IT leader unifies quoting across 10 business units on Salesforce

Altera Digital Health builds and delivers electronic health record and clinical technology to hospitals and health systems around the world.

Challenge

When Altera Digital Health was established as a standalone company, it inherited a quoting environment it did not own. The legacy CPQ application was licensed through the organization Altera had separated from, and it was embedded in an ERP platform scheduled to be retired entirely. The clock was running on both.

Replacing it was not a simple swap. Altera sells across six-plus business units, each with its own product portfolio, pricing logic, and rule sets. Deals are quoted in multiple currencies across the United States, EMEA, and APAC, with product availability and legal entity varying by region. Large quotes can run to 200 line items or more, and pricing is metric-based rather than a simple per-unit calculation.

The legacy system also left a visible gap. It could not generate customer-facing contracts, so agreements were assembled outside the quoting process entirely.

Products

- Experlogix CPQ
- Experlogix Document Automation

Benefits

- Quoting unified across six-plus business units
- Business-unit rule sets and product catalogs
- Multi-currency and region-locked selling
- Contracts generated directly from the quote
- Discount approvals by revenue category
- Order flow through to Dynamics 365 F&O

Tech

- Salesforce
- Microsoft Dynamics 365 Finance & Operations

Solution

Altera evaluated several CPQ platforms and narrowed the field to two finalists. PwC, the systems integrator leading the broader ERP program, recommended Experlogix on the strength of its integration capability. Altera selected Experlogix CPQ running natively inside Salesforce, with quotes flowing through to Microsoft Dynamics 365 Finance and Operations once an order is submitted.

Rather than force one global configuration, Altera's sales systems team built the solution around the business unit. Each unit has its own category, its own rule set, and its own product catalog. Region and currency are inherited from the Salesforce account and locked at the opportunity, so a seller working an Australian deal sees only products approved for that market, priced at the correct exchange rate against the right legal entity.

"Rules creation in Experlogix is much easier than our previous system, allowing multiple steps in a single rule which gives us more flexibility for the business," says Linda Muoio, Manager of Sales Systems at Altera.

Result

Altera went live across all business units on July 1, 2026, and early adoption has been the clearest signal of success.

Adoption without a fight. Sales users reaching the system for the first time have found it straightforward, and the sales systems team reports no negative feedback from the field since launch. A five-person command center group has emerged as the internal expert layer, quarterbacking deals and supporting sellers as usage expands.

"You're in Salesforce, you go directly into CPQ, and everything feeds right back into Salesforce," says Muoio. "Adoption on that has been very successful."

Guardrails built around each business unit. Sellers see only what is relevant to their unit and their region, which removes a category of error before it can happen. In Muoio's words, the team can segregate what a market like Australia sells from the full catalog available in the United States, so the wrong product never reaches a quote in the first place.

Contracts generated straight from the quote. Experlogix Document Automation closed the gap the legacy system left open. Terms and conditions pull dynamically from underlying tables based on the customer and the products on the deal, and the document options available shift with the status of the quote.



"Having contracts come directly out of Experlogix through Document Automation has been a really big upgrade for us. We didn't have contracts coming out of the old system at all."

Linda Muoio
Manager of Sales Systems

Approvals tied to revenue category. Discounting is governed by revenue category. Experlogix evaluates the discount against the categories on the quote and triggers the appropriate approval rule, which is pushed through to Salesforce and launched from a button on the quote header. Multi-level chains route larger discounts through additional signoffs before a quote can move forward.

Logic that takes fewer moving parts to maintain. Rule building has proven more efficient than the environment Altera left behind, with logic that once required several separate rules now handled in a single multi-step rule. Altera's team took direct control of system administration months ahead of launch, so by go-live they were configuring and maintaining the platform themselves.



“We have specific rules for specific business units.
That’s a really nice improvement for us.”

Linda Muoio
Manager of Sales Systems

Looking Ahead

Next on Altera's list is a more dynamic services quoting capability, extending automated configuration to engagements currently handled as custom work. The team is also revisiting its pricing architecture with the benefit of hindsight, and Experlogix integration with the Salesforce partner portal remains available should Altera extend quoting to its reseller network.

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