

SMART REVENUE APP

User Manual Guidelines



FEBRUARY 8, 2024

BLUVIUM INC

Application Description

'Smart Revenue App' is an application that is a comprehensive solution designed to meet the diverse needs of clients. It offers a wide range of features, like Tracking and Configuring various Revenue Metrics, and providing pre-built Dashboards and Reports with Revenue Calculator. Bluvium has developed this product based on its extensive experience gained from multiple client requests during Salesforce CPQ and billing implementation projects.

Benefits and Value

The app will provide crucial Revenue Metrics with Reports and Dashboards with Revenue Calculator based on user defined dates and a User-friendly configuration page for App settings & field mapping.

The app is compatible with any CPQ and Sales Cloud object (Quote, Order and Opportunity) with customizable fields which gives more flexibility to users to create Revenue details Records. Financial Year can be set for generating Revenue Details.

Platform requirements

Salesforce.com

The latest versions of any browser are listed below:

Google Chrome

Mozilla Firefox

Apple

Safari

Microsoft Edge

Mobile Browsers:

Mobile Safari (iOS) — The latest stable version is supported.

Android — The default browser on Android 4.x.x is supported.

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1. Installing the application from AppExchange

a. AppExchange Guidelines:

- i. Visit the AppExchange platform by navigating to *appexchange.salesforce.com*.
- ii. In the search bar, enter "Smart Revenue App" and click the search icon.
- iii. Locate the " Smart Revenue App " listing from the search results and click on it.
- iv. On the app listing page, click the "Get It Now" button.
- v. Log in to your Salesforce account using your credentials.
- vi. Grant the necessary permissions to Smart Revenue App by following the prompts. Ensure that you have the required administrator privileges.
- vii. Choose the Salesforce instance where you want to install the app. You may have multiple instances if you have sandboxes or development environments.
- viii. Select the appropriate installation option:
Install for Admins Only: Only administrators will have access to the Smart Revenue App.
Install for All Users: All users in your Salesforce org will have access to the Smart Revenue App. Review the terms and conditions and click the "Confirm and Install" button.
- ix. The installation process will begin, and you'll be redirected to a progress page. Wait for the installation to be completed.
- x. Once the installation is finished, you will receive an email confirmation from Salesforce.

b. Installation Setup in Salesforce Org:

- i. Once the installation is finished, you will receive an email confirmation from Salesforce.
- ii. Return to your Salesforce org and navigate to the App Launcher (the nine-dot grid icon) in the top-left corner.
- iii. Open the App Launcher and search for " Smart Revenue App." Click on the app icon to launch it.
- iv. The Smart Revenue App is now successfully installed and ready for setup.
- v. After installation, go to the Salesforce Setup menu.
- vi. In the left sidebar, search for "Installed Package."
- vii. You should be able to see the " Smart Revenue App ".

2. Application Navigation

- a. Go to the salesforce application navigation and search for Smart Revenue App.
- b. Click on the app name 'Smart Revenue App'.
- c. This will open the tabs which are necessary for manual configuration.
- d. The app will contain below tabs/objects:
 - i. Home
 - ii. Smart Revenue Settings
 - iii. Accounts
 - iv. Opportunities
 - v. Products
 - vi. Quotes
 - vii. Order
 - viii. Reports
 - ix. Dashboards
- e. For further details about the App, access the 'User Manual' by clicking on it, provided on the Configuration Page.

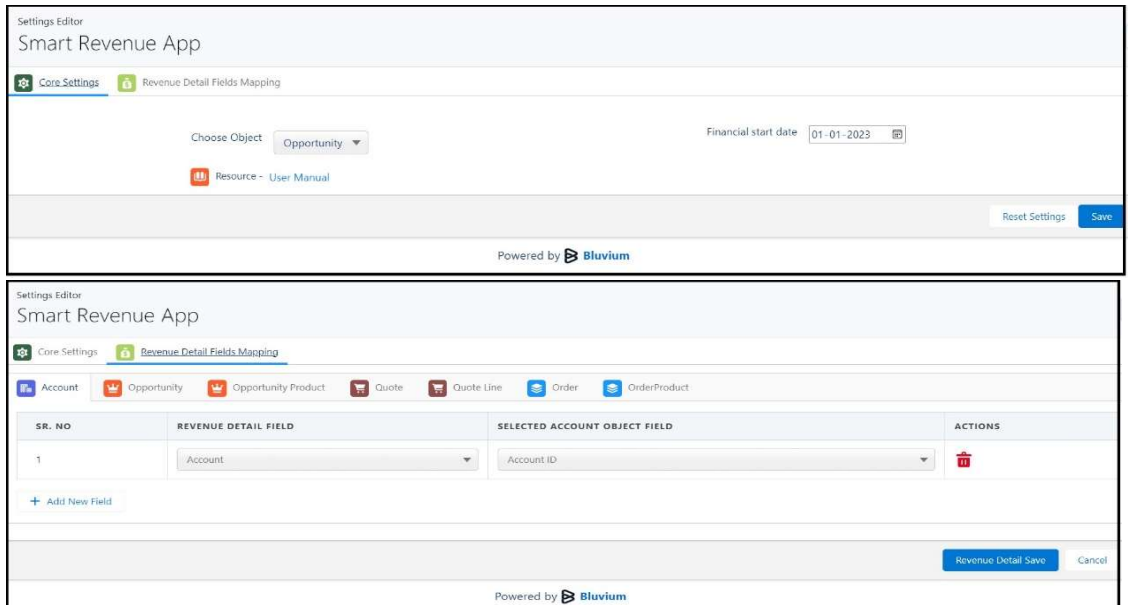
3. Post Installation Manual Configurations:

- a. By default, the 'Smart Revenue App' is enabled for the SBQQ__Quote__c object.
- b. Complete the following setup as below:
 - i) Add the field 'Revenue Details on Opportunity' checkbox on the Opportunity page layout.
 - ii) Add the field 'Revenue Details on Quote' checkbox on the Quote page layout.
 - iii) Add the field 'Revenue Details on Order' checkbox on the Order page layout.
 - iv) Add the 'Base Product' field on Product page layout.
 - v) Add Related List for 'Revenue Detail' Object on the Account, Quote, Order, Opportunity, and other objects page layouts as per the requirement.
 - vi) If the user wants to create more custom fields on the Revenue Detail record, he/she can create and map with different objects as per business needs.
- c. Assign 'BSRA_Permission_Set' to the required user to access the Smart Revenue App Objects.
- d. In CPQ package setting user must select the Subscription Prorate Precision as 'Calendar Monthly + Daily' under 'Subscriptions and Renewal' tab.
- e. Go to Setup -> Apex settings and make the checkbox 'true' for 'Deploy Metadata from Non-Certified Package Versions via Apex' to access the metadata.

4. Features Included in the Application

a. Configuration page:

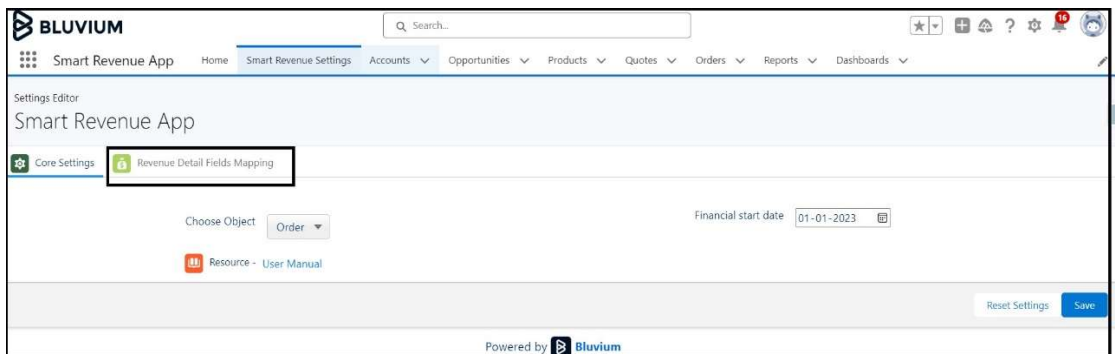
Users can set the field mappings for the Revenue Details object and Creation of Revenue Details record based on Object selection and Financial Start Date. Default settings can be restored using 'Reset Setting' button.



b. Field mappings from various objects with Revenue details Object

If the user wants to map some fields from other objects like (Account, Opportunity, Quote, Quote line, Order, or Order Product) then the user needs to set field mapping from the provided tab called 'Revenue Details Field Mapping'.

- Step 1: Click on 'Revenue Details Field Mapping'.



- Step 2: Once the user clicks on 'Revenue Details Field Mapping, it automatically lands on the mapping page from Account Object to Revenue Details Object.

- Step 3: The user needs to map fields from the 'Account' object to the 'Revenue Details' object's field with the matched data type, otherwise it throws an error message and will not accept the mapping.

SR. NO	REVENUE DETAIL FIELD	SELECTED ACCOUNT OBJECT FIELD	ACTIONS
1	Per Day Revenue	Annual Revenue	

+ Add New Field

Settings Editor
Smart Revenue App

Core Settings Revenue Detail Fields Mapping

SR. NO	REVENUE DETAIL FIELD	SELECTED ACCOUNT OBJECT FIELD	ACTIONS
1	Account	Account ID	
2	Per Day Revenue	Account Source	

Invalid Field selection for mapping. Data type Not Comparable.

+ Add New Field

Powered by Bluvium

Revenue Detail Save Cancel

- Step 4: The user needs to map fields from the 'Opportunity' object to the 'Revenue Details' object's field with the matched data type, otherwise it throws an error message and will not accept the mapping.

SR. NO	REVENUE DETAIL FIELD	SELECTED OPPORTUNITY OBJECT FIELD	ACTIONS
1	Revenue Percent Mapping Field	Probability (%)	

+ Add New Field

- Step 5: The user needs to map fields from the 'Opportunity Product' object to the 'Revenue Details' object's field with the matched data type, otherwise it throws an error message and will not accept the mapping.

SR. NO	REVENUE DETAIL FIELD	SELECTED OPPORTUNITY PRODUCT OBJECT FIELD	ACTIONS
1	Revenue Text Mapping Field	Product Code	
+ Add New Field			

- Step 6: The user needs to map fields from the 'Quote' object to the 'Revenue Details' object's field with the matched data type, otherwise it throws an error message and will not accept the mapping.

SR. NO	REVENUE DETAIL FIELD	SELECTED QUOTE OBJECT FIELD	ACTIONS
1	Revenue Number Mapping Field	Line Item Count	
+ Add New Field			

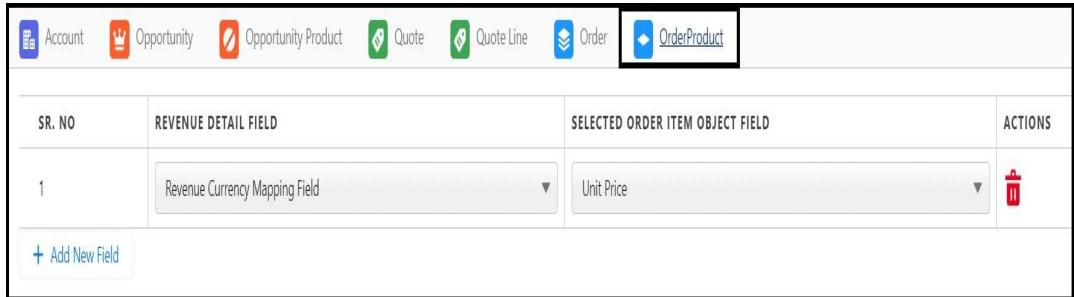
- Step 7: The user needs to map fields from the 'Quote Line' object to the 'Revenue Details' object's field with the matched data type, otherwise it throws an error message and will not accept the mapping.

SR. NO	REVENUE DETAIL FIELD	SELECTED QUOTE LINE OBJECT FIELD	ACTIONS
1	Revenue Mapping LongText.Field	Product	
+ Add New Field			

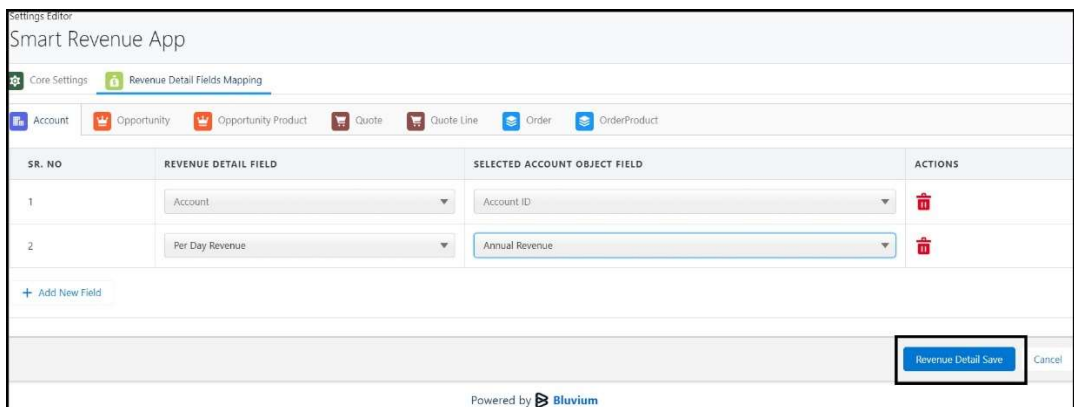
- Step 8: The user needs to map fields from the 'Order' object to the 'Revenue Details' object's field with the matched data type, otherwise it throws an error message and will not accept the mapping.

SR. NO	REVENUE DETAIL FIELD	SELECTED ORDER OBJECT FIELD	ACTIONS
1	List unit Price	Order Amount	
+ Add New Field			

- Step 9: The user needs to map fields from the 'Order Product' object to the 'Revenue Details' object's field with the matched data type, otherwise it throws an error message and will not accept the mapping.



- Step 10: Once the user is done with Mapping for the above objects, needs to click on the 'Revenue Details Save' button.



- Step 11: If user wants to reset the custom mappings, needs to click on the 'Reset Settings' button. Once the custom settings are reseted, only default settings will be persists.



c. Core Settings:

We have provided options to generate Revenue Details from Opportunity, Quote, and Order Object on the user selection basis.

i. Object Selection

- While generating Revenue details from Opportunity Object user need to set Choose object as 'Opportunity' from Configuration page [4.1] 'Core Settings' tab.
- In the 'Choose object' picklist field from the 'Core Settings' tab select 'Opportunity'.

A screenshot of a configuration field labeled 'Choose Object'. To its right is a dropdown menu with 'Opportunity' selected and a downward arrow.

- While generating Revenue details from the 'Quote' Object we need to first set an 'Core Settings' tab from the 'Smart Revenue App' page as given below setup format.
- In the 'Choose object' picklist field from the 'Core Settings' tab select 'Quote'.

A screenshot of a configuration field labeled 'Choose Object'. To its right is a dropdown menu with 'Quote' selected and a downward arrow.

- While generating Revenue details from Order Object we need to first set an 'Core Settings' tab from the 'Smart Revenue App' page as given below setup format.
- In the 'Choose object' picklist field from the 'Core Settings' tab select 'Order'.

A screenshot of a configuration field labeled 'Choose Object'. To its right is a dropdown menu with 'Order' selected and a downward arrow.

ii) Financial Start Date Selection:

- User has ability to select financial year start date from 'Core Settings' tab.

A screenshot of a configuration field labeled 'Financial start date'. The field contains the date '01/01/2023' and a calendar icon to its right.

- At last, click on the 'Save' button on the 'Core settings' tab page to save the configuration page set up.

A screenshot of the 'Settings Editor' for the 'Smart Revenue App'. The 'Core Settings' tab is selected. The 'Choose Object' dropdown is set to 'Opportunity' and the 'Financial start date' is '01-01-2023'. At the bottom right, the 'Save' button is highlighted with a red box. A 'Reset Settings' button is also visible. The footer shows 'Powered by Bluvium'.

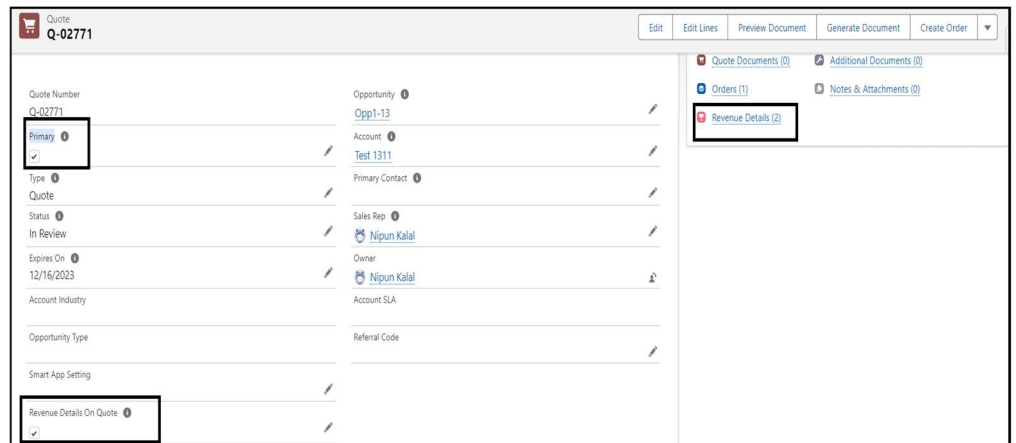
d. Generate Revenue Details from user-selected objects and financial start date:

Once the user is done with the configuration page set up i.e., field mapping, object selection and financial start date below steps need to be followed to generate Revenue Detail records.

- Create Account, Opportunity, and Quote.
- If user wants to create Revenue Detail records on **'Quote'** he has to select 'Choose object' as 'Quote' and set financial year start date as per his requirement.



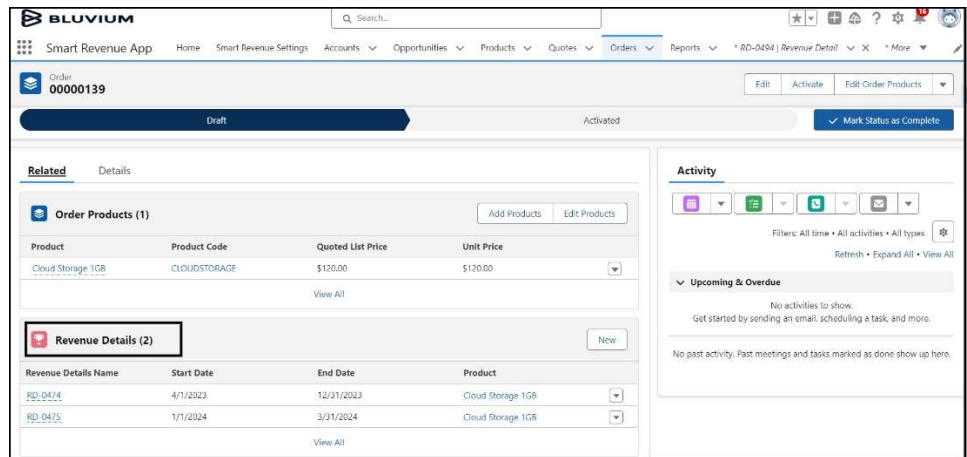
- While generating Revenue details from Quote, the user must go to the details page of a particular Quote record and check the field 'Revenue Details on Quote'.



- If user makes any changes in the same quote on which the Revenue Details are already created and now, he wants to create new records based on changes make a checkbox 'Revenue Details on Quote' as false and then 'Revenue Details on Quote' make it 'true' to create new records. It will overwrite the old records.

- If user wants to create Revenue Detail records on 'Order' he has to select 'Choose object' as 'Order' and set financial year start date as per his requirement.

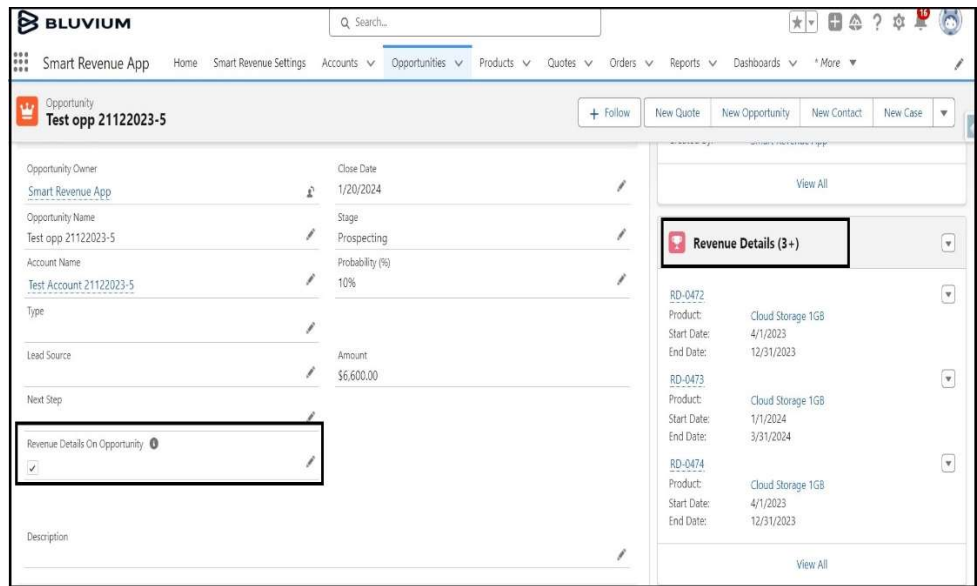
- While generating Revenue details from Order, the user must go to the details page of a particular Order record and check the field 'Revenue Details on Order'.



- If user makes any changes in the same quote on which the Revenue Details are already created and now, he wants to create new records based on changes make a checkbox 'Revenue Details on Order' as false and then 'Revenue Details on Order' make it 'true' to create new records. It will overwrite the new records.
- If user wants to create Revenue Detail records on '**Opportunity**' he has to select 'Choose object' as 'Opportunity' and set financial year start date as per his requirement.



- While generating Revenue details from Opportunity, the user needs to go to the details page of a particular Opportunity record and check the field 'Revenue Details on Opportunity'.



- If user makes any changes in the same quote on which the Revenue Details are already created and now, he/she wants to create new records based on changes, mark the checkbox 'Revenue Details on Opportunity' as 'false' and then make it 'true' to create new records. It will overwrite the old records.

e. Observe Revenue Detail records and Revenue Metrics Calculations:

i. Splitting of records:

Revenue Detail records are created based on the financial end date and subscription end date whichever date that comes first, creates the first record from there and the second record starts from the next date till the subscription end date as per the below logic.

Logic For Revenue Details Record Creation					
Case1	Org FY	1-Jan			
	Start Date	01-Oct-23			
	End Date	30-Nov-24			
			Start Date	End Date	FY
	RD1	Jan-Dec 2023	01-Oct-23	30-Nov-23	FY23
	RD2	Jan-Dec 2023	01-Dec-23	31-Dec-23	FY23
	RD3	Jan-Dec 2024	01-Jan-24	30-Nov-24	FY24

Case2	Org FY	1-Apr			
	Start Date	1-Oct-23			
	End Date	30-Nov-24			
			Start Date	End Date	FY
	RD1	April-March 2023	01-Oct-23	30-Nov-23	FY23
	RD2	April-March 2024	01-Dec-23	31-Mar-24	FY24
	RD3	April-March 2025	01-April-24	30-Nov-24	FY25

Revenue Detail records will be created like below (Representation only).

Quotes > Q-02671
Revenue Details

4 Items • Sorted by Monthly Recurring Revenue (MRR) • Updated a few seconds ago

<input type="checkbox"/>	Revenue De...	Product	Quote Line	Start Date	End Date	Quantity	Status	Monthly Recurring Revenue (M...	Total Contract Value (TCV)	Net Total
<input type="checkbox"/>	RD-2231	Cloud Storage 1GB	QL-0003294	1/1/2024	12/31/2024	5	Net New	\$50.00	\$600.00	\$600.00
<input type="checkbox"/>	RD-2232	Cloud Storage 1GB	QL-0003294	1/1/2025	12/31/2025	5	Net New	\$50.00	\$600.00	\$600.00
<input type="checkbox"/>	RD-2233	Productivity Suite	QL-0003295	1/1/2024	12/31/2024	5	Net New	\$200.00	\$2,400.00	\$2,400.00
<input type="checkbox"/>	RD-2234	Productivity Suite	QL-0003295	1/1/2025	12/31/2025	5	Net New	\$200.00	\$2,400.00	\$2,400.00

ii. Verify the Revenue Metrics:

We are calculating Revenue Metrics like **MRR, MURR, ARR, ACV, TCV** and **Net Total** as per below logic mentioned in the table.

Revenue Metrics Formulas/Logic on Revenue Details Record			
Sr No	Rev. Metrix	Logic	Description
1	MRR	QL Net Total / (QL Prorate Multiplier x Product Subscription Term)	Monthly Recuring Revenue
2	Prorate Multiplier (Revenue Details)	Proration between Start date and End date on Revenue Details (as Per Salesforce CPQ formulas and Logic)	(Proration)Months + Daily
3	Net Total	MRR x Prorate Multiplier (Revenue Details)	

5	MURR	MRR/Quantity	Monthly Unit Recuring Revenue
6	ARR	MRR x 12	Annual Recuring Revenue
7	ACV	Net Total	Annual Contract Value
8	TCV	Net Total	Total Contract Value
9	Q1 Revenue	MRR x Prorate Multiplier (Revenue Details) based On Start Date and End Date Proration	(Proration)Calendar Monthly + Daily
10	Q2 Revenue	MRR x Prorate Multiplier (Revenue Details) based On Start Date and End Date Proration	
11	Q3 Revenue	MRR x Prorate Multiplier (Revenue Details) based On Start Date and End Date Proration	
12	Q4 Revenue	MRR x Prorate Multiplier (Revenue Details) based On Start Date and End Date Proration	

Note: (All Calculation are Based on Calender month + Daily Proration Formula)

Revenue Details record page :

Smart Revenue App Home Smart Revenue Settings Accounts Opportunities Products Quotes

Revenue Detail
RD-0839

Revenue Details

Monthly Unit Recuring Revenue (MURR) ⓘ \$20.00	Monthly Recurring Revenue (MRR) ⓘ \$80.00
Annual Recuring Revenue (ARR) ⓘ \$960.00	Net Total ⓘ \$960.00

Quaterly Revenue

Q1 Revenue ⓘ \$240.00	Q2 Revenue ⓘ \$240.00
Q3 Revenue ⓘ \$240.00	Q4 Revenue ⓘ \$240.00

f. Track Revenue type on Revenue Details Records:

There are the following types of status for Revenue mentioned in the below table.

Status Logic on Revenue Details Record	
Net New	Amount for a new product that has been sold to the customer (i.e., customer does not have that product)
Expansion	When additional quantity is sold for a product that the customer already owns.
Reduction	When a customer reduces the quantity of a product, they own.
Churn	When a customer reduces the quantity of a product, they own to 0 - getting rid of a product.
Renewal	Amount renewed on the renewal quote.
Renewal with Expansion	Customer is Renewing the contract with additional quantity of Product than earlier.
Renewal with Reduction	Customer is Renewing the contract with less quantity of Product than earlier.
Upgrade	When moving from a lower version to a higher version of a product that a customer already owns.
Downgrade	When moving from a higher version to a lower version of a product that a customer already owns.

➤ **Net New:** Amount for a new product that has been sold to the customer (i.e., the customer does not have that product)

Step 1: Add products to the Quote.

Step 2: Generate Revenue Detail records from Quote, Order, or Opportunity.

Step 3: Observe the status.

Quotes > Q-00103
Revenue Details

4 items • Updated a few seconds ago

Revenue Detai...	Product	Start Date	End Date	Type	Monthly Re...	Monthly U...	Annual Recurr...	Annual Contra...
1 <input type="checkbox"/> RD-0440	Cloud Storage 1GB	4/1/2023	12/31/2023	Net New	\$550.00	\$10.00	\$6,600.00	\$4,950.00
2 <input type="checkbox"/> RD-0441	Cloud Storage 1GB	1/1/2024	10/31/2024	Net New	\$550.00	\$10.00	\$6,600.00	\$5,500.00
3 <input type="checkbox"/> RD-0442	Creativity Suite License	4/1/2023	12/31/2023	Net New	\$458.32	\$8.33	\$5,499.88	\$4,124.91
4 <input type="checkbox"/> RD-0443	Creativity Suite License	1/1/2024	10/31/2024	Net New	\$458.32	\$8.33	\$5,499.88	\$4,583.24

- **Expansion:** When an additional quantity is sold for a product that the customer already owns

Step 1: Amend the contract and increase the quantity of purchased products.

Step 2: Create a new contract.

Step 3: Observe the status.

Quotes > Q-00104
Revenue Details

4 items • Updated a few seconds ago

Revenue Det...	Product	Start Date	End Date	Type	Monthly Re...	Monthly U...	Annual Recurr...	Annual Contra...
1 <input type="checkbox"/> RD-0444	Cloud Storage 1GB	12/21/2023	12/31/2023	Reduction	-\$440.01	-\$10.00	-\$5,280.08	-\$156.13
2 <input type="checkbox"/> RD-0445	Cloud Storage 1GB	1/1/2024	10/31/2024	Reduction	-\$440.01	-\$10.00	-\$5,280.08	-\$4,400.07
3 <input type="checkbox"/> RD-0446	Creativity Suite License	12/21/2023	12/31/2023	Expansion	\$458.33	\$8.33	\$5,499.98	\$162.63
4 <input type="checkbox"/> RD-0447	Creativity Suite License	1/1/2024	10/31/2024	Expansion	\$458.33	\$8.33	\$5,499.98	\$4,583.32

- **Reduction:** When a customer reduces the quantity of a product they own.

Step 1: Amend the contract and reduce the quantity of purchased products.

Step 2: Create a new contract.

Step 3: Observe the status.

Quotes > Q-00104
Revenue Details

4 items • Updated a few seconds ago

Revenue Det...	Product	Start Date	End Date	Type	Monthly Re...	Monthly U...	Annual Recurr...	Annual Contra...
1 <input type="checkbox"/> RD-0444	Cloud Storage 1GB	12/21/2023	12/31/2023	Reduction	-\$440.01	-\$10.00	-\$5,280.08	-\$156.13
2 <input type="checkbox"/> RD-0445	Cloud Storage 1GB	1/1/2024	10/31/2024	Reduction	-\$440.01	-\$10.00	-\$5,280.08	-\$4,400.07
3 <input type="checkbox"/> RD-0446	Creativity Suite License	12/21/2023	12/31/2023	Expansion	\$458.33	\$8.33	\$5,499.98	\$162.63
4 <input type="checkbox"/> RD-0447	Creativity Suite License	1/1/2024	10/31/2024	Expansion	\$458.33	\$8.33	\$5,499.98	\$4,583.32

- **Churn:** When a customer reduces the quantity of a product, they own to 0 – getting rid of a product.

Step 1: Amend the contract and reduce the quantity of purchased product to 0.

Quotes > Q-00069
Revenue Details

4 items • Updated a few seconds ago

Revenue Detail...	Product	Start Date	End Date	Type	Monthly Re...	Monthly Un...	Annual Recur...	Annual Contr...
1 RD-0488	Cloud Storage 1GB	8/1/2024	12/31/2024	Churn	-\$50.00	-\$10.00	-\$600.00	-\$250.00
2 RD-0489	Cloud Storage 1GB	1/1/2025	3/31/2025	Churn	-\$50.00	-\$10.00	-\$600.00	-\$150.00

Step 2: Create a new contract.

- **Upgrade and Upgraded:** When moving from a lower version to a higher version of a product that a customer already owns. Lower version product will be stamped as 'Upgraded' and higher version as 'Upgrade'.

Step 1: On the upgrade/ higher version product, populate the value of the base product field to identify the upgrade/ higher version product.

Step 2: Add the base/lower version product to the quote.

Step 3: Create a contract.

Step 4: Amend the contract and add an upgrade/ higher version product.

Product
Productivity Suite

Edit Clone with Related Translate

Product Code: PRODUCTIVITYSUITE Product Family: Software

Details Related

Product Name: Productivity Suite Active

Product Code: PRODUCTIVITYSUITE Product Family: Software

Base Product: [Cloud Storage 1GB](#) Region

Related List Quick Links

- Features (0)
- Options (0)
- Option Constraints (0)
- Configuration Attributes (0)
- Configuration Rules (0)
- Block Prices (0)
- Price Dimensions (0)
- Price Books (1)

Show All (9)

Quotes > Q-00098
Revenue Details

2 items • Updated a few seconds ago

Revenue Detai...	Product	Start Date	End Date	Type	Monthly Re...	Monthly U...	Annual Recurr...	Annual Contra...
1 RD-0428	Cloud Storage 1GB	4/1/2023	12/31/2023	Net New	\$550.00	\$10.00	\$6,600.00	\$4,950.00
2 RD-0429	Cloud Storage 1GB	1/1/2024	8/31/2024	Net New	\$550.00	\$10.00	\$6,600.00	\$4,400.00

Step 5: Reduce the base/ lower version product quantity to 0 and add upgrade/ higher version product with some quantity.

Q-00099
Edit Quote

Quote Information

Start Date: 12/21/2023 End Date: 8/31/2024 Subscription Term: []

Additional Disc. (%): []

#	PRODUCT CODE	PRODUCT NAME	START DATE	END DATE	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	CLOUDSTORAGE	Cloud Storage 1GB	12/21/2023	8/31/2024	0.00	\$120.00		\$83.55	-\$4,595.25
2	PRODUCTIVITYSUITE	Productivity Suite	12/21/2023	8/31/2024	55.00	\$2,400.00		\$1,670.97	\$91,903.35
SUBTOTAL:									\$87,308.10
QUOTE TOTAL:									

Step 6: Create a contract.

Step 7: Observe the status. Upgraded from product and upgraded to product values will be stamped on Revenue Detail record.

Quotes > Q-00099
Revenue Details

4 items • Updated a few seconds ago

Revenue Det...	Product	Start Date	End Date	Type	Monthly Re...	Monthly U...	Annual Recurri...	Annual Contra...
RD-0430	Cloud Storage 1GB	12/21/2023	12/31/2023	Upgraded	-\$550.01	-\$10.00	-\$6,600.13	-\$195.17
RD-0431	Cloud Storage 1GB	1/1/2024	8/31/2024	Upgraded	-\$550.01	-\$10.00	-\$6,600.13	-\$4,400.08
RD-0432	Productivity Suite	12/21/2023	12/31/2023	Upgrade	\$11,000.01	\$200.00	\$132,000.18	\$3,903.23
RD-0433	Productivity Suite	1/1/2024	8/31/2024	Upgrade	\$11,000.01	\$200.00	\$132,000.18	\$88,000.12

Quotes > Q-00099
Revenue Details

4 items • Updated a few seconds ago

Revenue Det...	Product	Start Date	End Date	Type	Monthly Re...	Monthly U...	Annual Recurri...	Annual Contra...
RD-0430	Cloud Storage 1GB	12/21/2023	12/31/2023	Upgraded	-\$550.01	-\$10.00	-\$6,600.13	-\$195.17
RD-0431	Cloud Storage 1GB	1/1/2024	8/31/2024	Upgraded	-\$550.01	-\$10.00	-\$6,600.13	-\$4,400.08
RD-0432	Productivity Suite	12/21/2023	12/31/2023	Upgrade	\$11,000.01	\$200.00	\$132,000.18	\$3,903.23
RD-0433	Productivity Suite	1/1/2024	8/31/2024	Upgrade	\$11,000.01	\$200.00	\$132,000.18	\$88,000.12

Revenue Detail
RD-0430

Upgrade and Downgrade

Upgraded from Cloud Storage 1GB	Downgraded from
Upgraded to Productivity Suite	Downgraded to

Revenue Details

Monthly Unit Recurring Revenue (MURR) -\$10.00	Monthly Recurring Revenue (MRR) -\$550.01
Annual Recurring Revenue (ARR) -\$6,600.13	Net Total -\$195.17

➤ **Downgrade and Downgraded:** When moving from a higher version to a lower version of a product that a customer already owns.

higher version product will be stamped as 'Downgraded' and lower version as 'Downgrade'.

Step 1: On the upgrade/ higher version product, populate the value of the base product field to identify the upgrade/ higher version product..

Step 2: Add the upgrade/higher version product to the quote.

Product Productivity Suite

Product Code: PRODUCTIVITYSUITE, Product Family: Software

Details: Product Name: Productivity Suite, Active: Product Code: PRODUCTIVITYSUITE, Product Family: Software, Region: Base Product: **Cloud Storage 1GB**

Related List Quick Links: Features (0), Options (0), Option Constraints (0), Configuration Attributes (0), Configuration Rules (0), Block Prices (0), Price Dimensions (0), Price Books (1)

Quotes > Q-00109 Revenue Details

Revenue Det...	Product	Start Date	End Date	Type	Monthly Recu...	Monthly U...	Annual Recurri...	Annual Contrac...
1 RD-0492	Productivity Suite	1/1/2024	12/31/2024	Net New	\$2,000.00	\$200.00	\$24,000.00	\$24,000.00
2 RD-0493	Productivity Suite	1/1/2025	12/31/2025	Net New	\$2,000.00	\$200.00	\$24,000.00	\$24,000.00

Step 3: Create a contract.

Step 4: Amend the contract and add base/lower version product (On upgrade/higher version product select the value of base product field to identify the upgrade/ higher version product).

Q-00110 Edit Quote

Quote Information: Start Date: 1/1/2024, End Date: 12/31/2025, Subscription Term: Additional Disc. (%):

#	PRODUCT CODE	PRODUCT NAME	START DATE	END DATE	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	PRODUCTIVITYSUITE	Productivity Suite	6/1/2024	12/31/2025	0.00	\$2,400.00		\$4,800.00	\$0.00
2	CLOUDSTORAGE	Cloud Storage 1GB	6/1/2024	12/31/2025	10.00	\$120.00		\$240.00	\$240.00
SUBTOTAL:									\$240.00

QUOTE TOT

Step 5: Reduce the upgrade/ higher version product quantity to 0 and add base/lower version product with some quantity.

Step 6: Observe the status. Downgraded from product and downgraded to product values will be stamped on Revenue Detail record.

Quotes > Q-00110
Revenue Details

4 items • Updated a few seconds ago

Revenue De...	Product	Start Date	End Date	Type	Monthly Recu...	Monthly U...	Annual Recurri...	Annual Contrac...
1 RD-0494	Productivity Suite	6/1/2024	12/31/2024	Downgraded	-\$2,000.00	-\$200.00	-\$24,000.00	-\$14,000.00
2 RD-0495	Productivity Suite	1/1/2025	12/31/2025	Downgraded	-\$2,000.00	-\$200.00	-\$24,000.00	-\$24,000.00
3 RD-0496	Cloud Storage 1GB	6/1/2024	12/31/2024	Downgrade	\$100.00	\$10.00	\$1,200.00	\$700.00
4 RD-0497	Cloud Storage 1GB	1/1/2025	12/31/2025	Downgrade	\$100.00	\$10.00	\$1,200.00	\$1,200.00

Quotes > Q-00110
Revenue Details

4 items • Updated a few seconds ago

Revenue De...	Product	Start Date	End Date	Type	Monthly Recu...	Monthly U...	Annual Recurri...	Annual Contrac...
1 RD-0494	Productivity Suite	6/1/2024	12/31/2024	Downgraded	-\$2,000.00	-\$200.00	-\$24,000.00	-\$14,000.00
2 RD-0495	Productivity Suite	1/1/2025	12/31/2025	Downgraded	-\$2,000.00	-\$200.00	-\$24,000.00	-\$24,000.00
3 RD-0496	Cloud Storage 1GB	6/1/2024	12/31/2024	Downgrade	\$100.00	\$10.00	\$1,200.00	\$700.00
4 RD-0497	Cloud Storage 1GB	1/1/2025	12/31/2025	Downgrade	\$100.00	\$10.00	\$1,200.00	\$1,200.00

Revenue Detail
RD-0494

Upgrade and Downgrade

Upgraded from ⓘ	Downgraded from ⓘ Productivity Suite
Upgraded to ⓘ	Downgraded to ⓘ Cloud Storage 1GB

Revenue Details

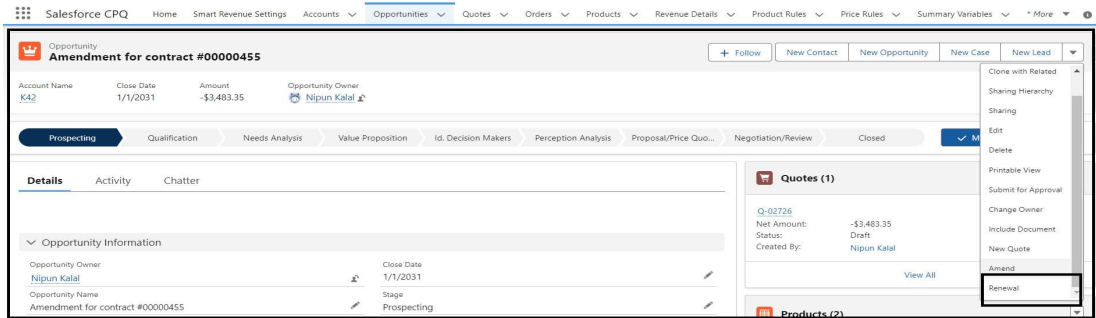
Monthly Unit Recurring Revenue (MURR) ⓘ -\$200.00	Monthly Recurring Revenue (MRR) ⓘ -\$2,000.00
Annual Recurring Revenue (ARR) ⓘ -\$24,000.00	Net Total ⓘ -\$14,000.00

➤ **Renewal:** Amount renewed on the renewal quote

Step 1: Add products to the quote.

Step 2: Create a Contract.

Step 3: Renew the Contract.



Step 4: Generate Revenue Records.

Step 5: Observe the status.

The screenshot shows the 'Revenue Details' page for quote 'Q-02676'. It displays a table with 4 items, sorted by Monthly Recurring Revenue (MRR). The table has the following columns: Revenue Description, Product, Quote Line, Start Date, End Date, Quantity, Status, Monthly Recurring Revenue, Total Contract Value (TCV), and Net Total. The 'Status' column is highlighted with a red box.

Revenue Description	Product	Quote Line	Start Date	End Date	Quantity	Status	Monthly Recurring Revenue	Total Contract Value (TCV)	Net Total
RD-2271	Cloud Storage 1GB	QL-0003302	1/1/2026	12/31/2026	3	Renewal	\$30.00	\$360.00	\$360.00
RD-2272	Cloud Storage 1GB	QL-0003302	1/1/2027	12/31/2027	3	Renewal	\$30.00	\$360.00	\$360.00
RD-2273	Productivity Suite	QL-0003303	1/1/2026	12/31/2026	8	Renewal	\$320.00	\$3,840.00	\$3,840.00
RD-2274	Productivity Suite	QL-0003303	1/1/2027	12/31/2027	8	Renewal	\$320.00	\$3,840.00	\$3,840.00

- **Renewal with Expansion:** Amount renewed on the renewal quote with some additional quantity of product.

Step 1: Add products to the quote.

The screenshot shows the 'Edit Quote' page for quote 'Q-02812'. It displays a table with product details. The table has the following columns: #, Product Code, Product Name, Quantity, Start Date, End Date, List Unit Price, Additional Disc., Net Unit Price, and Net Total. The 'Marketing Platform License' product is highlighted with a red box.

#	Product Code	Product Name	Quantity	Start Date	End Date	List Unit Price	Additional Disc.	Net Unit Price	Net Total
1	CLOUDSTORAGE	Cloud Storage 1GB	5.00	1/1/2024	12/31/2025	\$120.00		\$240.00	\$1,200.00
2	MARKETINLICENSE	Marketing Platform License	5.00	1/1/2024	12/31/2025	\$150.00		\$300.00	\$1,500.00
SUBTOTAL:								\$2,700.00	
QUOTE TOTAL:								\$2,700.00	

Step 2: Create a Contract.

Step 3: Renew the Contract.

Salesforce CPQ Home Smart Revenue Settings Accounts Opportunities Quotes Orders Products Revenue Details Product Rules Price Rules Summary Variables More

Q-02821 Edit Quote All Subscription And Asset Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

Quote Information Start Date 1/1/2026 End Date 12/31/2027 Subscription Term Additional Disc. (%)

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	START DATE	END DATE	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	CLOUDSTORAGE	Cloud Storage 1GB	3.00	1/1/2026	12/31/2027	\$120.00		\$240.00	\$720.00
2	MARKETINLICENSE	Marketing Platform License	10.00	1/1/2026	12/31/2027	\$150.00		\$300.00	\$3,000.00
								SUBTOTAL:	\$3,720.00

QUOTE TOTAL: \$3,720.00

Step 4: Generate Revenue Records.

Step 5: Observe the status.

Quotes > Q-02821 Revenue Details New Change Owner

4 items • Sorted by Monthly Recurring Revenue (MRR) • Updated a few seconds ago

Revenue De...	Product	Quote Line	Start Date	End Date	Quantity	Status	Monthly Recurring Revenue...	Total Contract Value (TCV)	Net Total
1	RD-3218	Cloud Storage 1GB QL-0003518	1/1/2026	12/31/2026	3	Renewal with Reduction	\$30.00	\$360.00	\$360.00
2	RD-3219	Cloud Storage 1GB QL-0003518	1/1/2027	12/31/2027	3	Renewal with Reduction	\$30.00	\$360.00	\$360.00
3	RD-3220	Marketing Platform... QL-0003519	1/1/2026	12/31/2026	10	Renewal with Expansion	\$125.00	\$1,500.00	\$1,500.00
4	RD-3221	Marketing Platform... QL-0003519	1/1/2027	12/31/2027	10	Renewal with Expansion	\$125.00	\$1,500.00	\$1,500.00

➤ **Renewal with Reduction:** Amount renewed on the renewal quote with some less quantity of product.

Step 1: Add products to the quote.

Salesforce CPQ Home Smart Revenue Settings Accounts Opportunities Quotes Orders Products Revenue Details Product Rules Price Rules Summary Variables More

Q-02812 Edit Quote All Subscription And Asset Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

Quote Information Start Date 1/1/2024 End Date 12/31/2025 Subscription Term Additional Disc. (%)

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	START DATE	END DATE	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	CLOUDSTORAGE	Cloud Storage 1GB	5.00	1/1/2024	12/31/2025	\$120.00		\$240.00	\$1,200.00
2	MARKETINLICENSE	Marketing Platform License	5.00	1/1/2024	12/31/2025	\$150.00		\$300.00	\$1,500.00
								SUBTOTAL:	\$2,700.00

QUOTE TOTAL: \$2,700.00

Step 2: Create a Contract.

Step 3: Renew the Contract.

Salesforce CPQ Home Smart Revenue Settings Accounts Opportunities Quotes Orders Products Revenue Details Product Rules Price Rules Summary Variables More

Q-02821 Edit Quote All Subscription And Asset Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

Quote Information Start Date 1/1/2026 End Date 12/31/2027 Subscription Term Additional Disc. (%)

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	START DATE	END DATE	LIST UNIT PRICE	ADDITIONAL DISC.	NET UNIT PRICE	NET TOTAL
1	CLOUDSTORAGE	Cloud Storage 1GB	3.00	1/1/2026	12/31/2027	\$120.00		\$240.00	\$720.00
2	MARKETINLICENSE	Marketing Platform License	10.00	1/1/2026	12/31/2027	\$150.00		\$300.00	\$3,000.00
								SUBTOTAL:	\$3,720.00

QUOTE TOTAL: \$3,720.00

Step 4: Generate Revenue Records.

Step 5: Observe the status.

Quotes > Q-02821
Revenue Details New Change Owner

4 items • Sorted by Monthly Recurring Revenue (MRR) • Updated a few seconds ago

Revenue De...	Product	Quote Line	Start Date	End Date	Quantity	Status	Monthly Recurring Revenue...	Total Contract Value (TCV)	Net Total
1 <input type="checkbox"/> RD-3218	Cloud Storage 1GB	QL-0003518	1/1/2026	12/31/2026	3	Renewal with Reduction	\$30.00	\$360.00	\$360.00
2 <input type="checkbox"/> RD-3219	Cloud Storage 1GB	QL-0003518	1/1/2027	12/31/2027	3	Renewal with Reduction	\$30.00	\$360.00	\$360.00
3 <input type="checkbox"/> RD-3220	Marketing Platform...	QL-0003519	1/1/2026	12/31/2026	10	Renewal with Expansion	\$125.00	\$1,500.00	\$1,500.00
4 <input type="checkbox"/> RD-3221	Marketing Platform...	QL-0003519	1/1/2027	12/31/2027	10	Renewal with Expansion	\$125.00	\$1,500.00	\$1,500.00

Note: Refer below table for status

Account	Product	Amend/ Renewal	Opportu nity	Start Date	End Date	quanti ty	Net Total	Statuts
John	Cloud storage		Opp1	01-04-2023	31-03-2025	5	positive	Net New
	Productivity suite		Opp1	01-04-2023	31-03-2025	5	positive	Net New
		Amend	Opp1	01-08-2023	31-03-2025	3	negative	Reduction
		Renewal	Opp1	01-01-2026	31-12-2028			Renewal
Create Opportunity2								
	Cloud storage		Opp2	01-06-2023	31-03-2025	3	posititive	expansion
	Cloud storage	Amend	Opp2	01-09-2023	31-03-2025	0	negative	Churn

Account	Product	Amend/ Renewal	Opportunity	Start Date	End Date	quantity	Statuts
John	Cloud storage		Opp1	01-04-2023	31-03-2025	5	Net New
	Productivity suite		Opp1	01-04-2023	31-03-2025	5	Net New
		Renewal	Opp1	01-01-2026	31-12-2028		
	Cloud storage		Renewal Opp1	01-01-2026	31-12-2028	3	Renewal with Reduction
	Productivity suite		Renewal Opp1	01-01-2026	31-12-2028	10	Renewal with Expansion

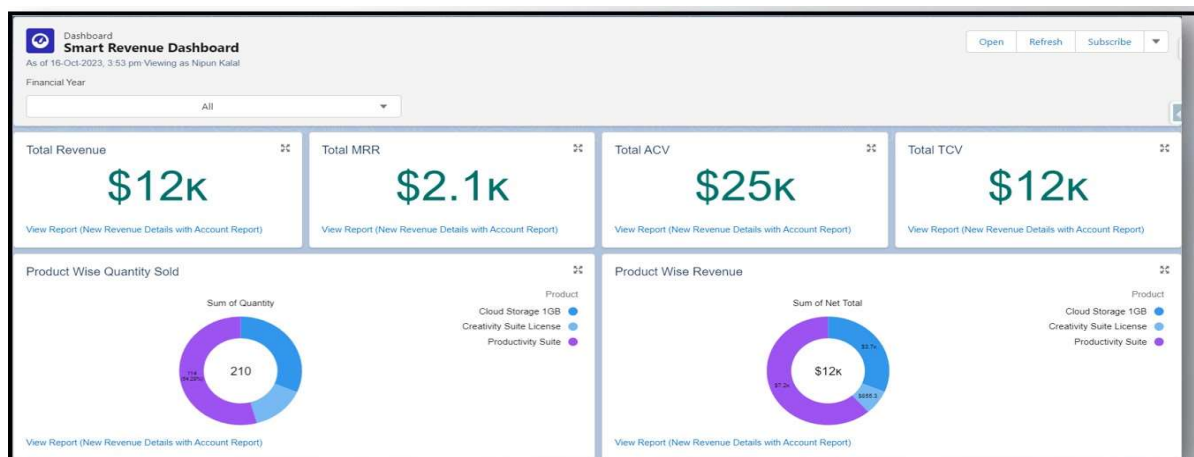
1) Go to Productivity Suite Product-> Populate Value in Base Product Field as Cloud Storage 1GB.									
Steps	Acc	Opportunity	Product	Amend	Start Date	End Date	Quantity	Net total	Statuts
Step-1	John	Opp1	Cloud Storage 1GB		01-01-2024	31-12-2025	5	positive	Net New
Step-2		Opp1	Cloud Storage 1GB	Yes	01-07-2024	31-12-2025	0	negative	Upgraded
			Productivity Suite	while Amend Add Product-Productivity Suite	01-07-2024	31-12-2025	5	positive	Upgrade

1) Go to Productivity Suite Product-> Populate Value in Base Product Field as Cloud Storage 1GB.									
Steps	Acc	Opportunity	Product	Amend	Start Date	End Date	Quantity	Net total	Statuts
Step-1	John	Opp1	Productivity Suite		01-01-2024	31-12-2025	5	positive	Net New
Step-2		Opp1	Productivity Suite	Yes	01-07-2024	31-12-2025	0	negative	Downgraded
			Cloud Storage 1GB	while Amend Add Product-Cloud Storage 1GB	01-07-2024	31-12-2025	5	positive	Downgrade

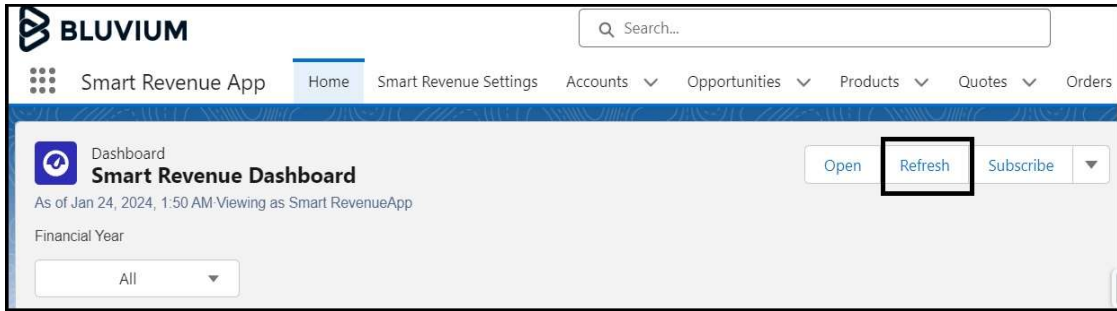
g. Track Revenue on Reports and Dashboard:

Step 1: Create a report for the required data or use the predefined reports.

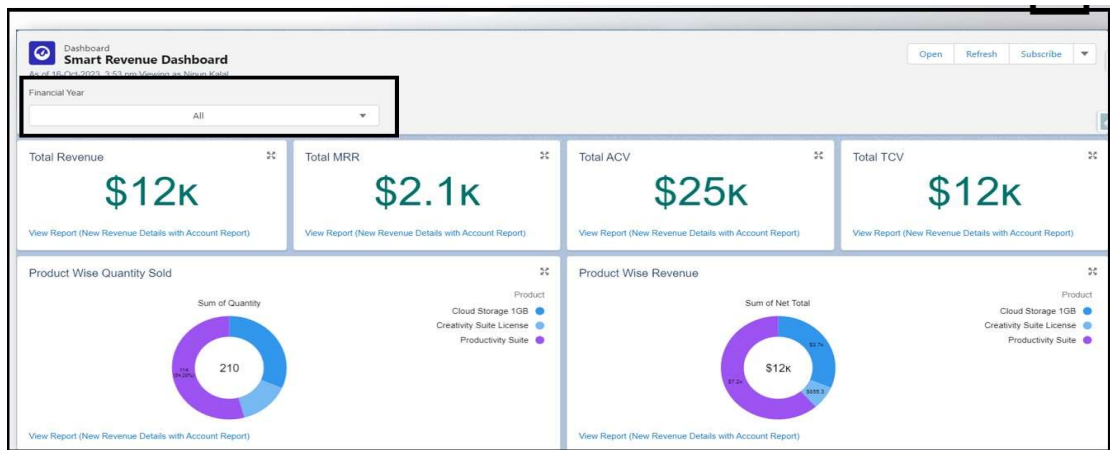
Step 2: Create a Dashboard using the required components or use predefined Dashboard.



Step 3: Refresh the Dashboard as required.

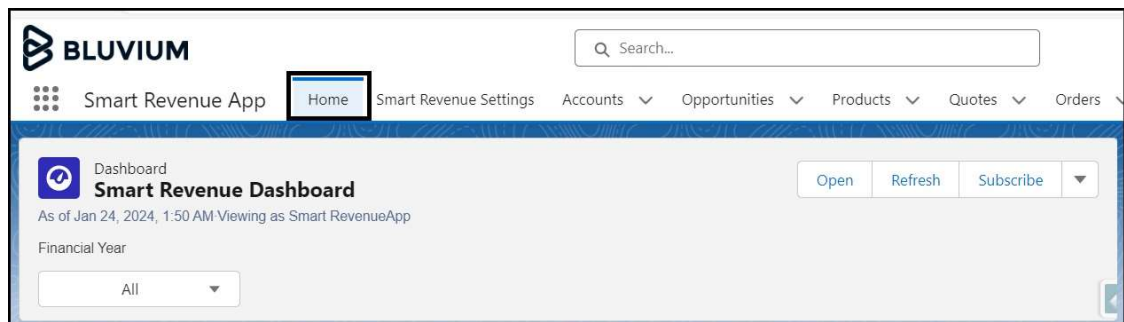


Step 5: Sort the data using the financial year filter.



h. Net total calculator to find revenue between date range for a particular Accounts with its Products.

Step 1: Go to the Home tab.



Step 2: Refresh the component.

Revenue Details

* Start Date: Mar 1, 2024 * End Date: Oct 31, 2025

Account Name: 1 Option(s) Selected
Roshan 25/10 X

Product Name: 2 Option(s) Selected
Cloud Storage 1GB X Productivity Suite X

Calculate **Download CSV**

<input type="checkbox"/>	Account	Product	MRR	Total Re...
<input type="checkbox"/>	Roshan 25/10	Productivity S...	\$520.00	\$4,960.00
<input type="checkbox"/>	Roshan 25/10	Cloud Storang...	\$80.00	\$740.00

Step 3: Enter the Start Date and End Date.

Revenue Details

* Start Date: Mar 1, 2024 * End Date: Oct 31, 2025

Account Name: 1 Option(s) Selected
Roshan 25/10 X

Product Name: 2 Option(s) Selected
Cloud Storage 1GB X Productivity Suite X

Calculate **Download CSV**

<input type="checkbox"/>	Account	Product	MRR	Total Re...
<input type="checkbox"/>	Roshan 25/10	Productivity S...	\$520.00	\$4,960.00
<input type="checkbox"/>	Roshan 25/10	Cloud Storang...	\$80.00	\$740.00

Step 4: Select one or more Accounts.

Revenue Details

*** Start Date**

Mar 1, 2024

*** End Date**

Oct 31, 2025

Account Name

1 Option(s) Selected

Roshan 25/10
✕

Product Name

2 Option(s) Selected

Cloud Storage 1GB
✕
Productivity Suite
✕

Calculate

Download CSV

<input type="checkbox"/>	Account	Product	MRR	Total Re...
<input type="checkbox"/>	Roshan 25/10	Productivity S...	\$520.00	\$4,960.00
<input type="checkbox"/>	Roshan 25/10	Cloud Storang...	\$80.00	\$740.00

Step 5: Select one or more Products.

Revenue Details

*** Start Date**

Mar 1, 2024

*** End Date**

Oct 31, 2025

Account Name

1 Option(s) Selected

Roshan 25/10
✕

Product Name

2 Option(s) Selected

Cloud Storage 1GB
✕
Productivity Suite
✕

Calculate

Download CSV

<input type="checkbox"/>	Account	Product	MRR	Total Re...
<input type="checkbox"/>	Roshan 25/10	Productivity S...	\$520.00	\$4,960.00
<input type="checkbox"/>	Roshan 25/10	Cloud Storang...	\$80.00	\$740.00

Step 6: Click on the Calculate button.

Revenue Details

* Start Date: Mar 1, 2024 * End Date: Oct 31, 2025

Account Name: 1 Option(s) Selected
Roshan 25/10 X

Product Name: 2 Option(s) Selected
Cloud Storage 1GB X Productivity Suite X

Calculate **Download CSV**

<input type="checkbox"/>	Account	Product	MRR	Total Re...
<input type="checkbox"/>	Roshan 25/10	Productivity S...	\$520.00	\$4,960.00
<input type="checkbox"/>	Roshan 25/10	Cloud Storang...	\$80.00	\$740.00

Step 7: Observe the table.

Revenue Details

* Start Date: Mar 1, 2024 * End Date: Oct 31, 2025

Account Name: 1 Option(s) Selected
Roshan 25/10 X

Product Name: 2 Option(s) Selected
Cloud Storage 1GB X Productivity Suite X

Calculate **Download CSV**

<input type="checkbox"/>	Account	Product	MRR	Total Re...
<input type="checkbox"/>	Roshan 25/10	Productivity S...	\$520.00	\$4,960.00
<input type="checkbox"/>	Roshan 25/10	Cloud Storang...	\$80.00	\$740.00

Step 8: Click on the Download CSV button.

Revenue Details

*** Start Date**

*** End Date**

Account Name

1 Option(s) Selected
▼

Roshan 25/10
✕

Product Name

2 Option(s) Selected
▼

Cloud Storage 1GB
✕
Productivity Suite
✕

Calculate

Download CSV

	Account	Product	MRR	Total Re...
<input type="checkbox"/>	Roshan 25/10	Productivity S...	\$520.00	\$4,960.00
<input type="checkbox"/>	Roshan 25/10	Cloud Storang...	\$80.00	\$740.00

Step 9: Find the downloaded Excel file in Downloads.

Downloads

Name	Date modified	Type	Size
Today			
excel_data	09-11-2023 14:06	Microsoft Excel 97...	2 KB

5. Support and Troubleshooting

- a. If you encounter any issues or need assistance, follow these steps:
 - i. Refer 'User Manual' provided on the 'Core Settings' page of the App.
 - ii. Refer to the documentation provided and FAQs for common questions and troubleshooting tips.
 - iii. Visit the support page on the AppExchange listing to access resources and contact support.
 - iv. Provide detailed information about the problem, including error messages, steps to reproduce, and your Salesforce organization details.

6. References:

- i) [SCRMA tested Sheet.xlsx \(Attached as a separate document\)](#)