



INVOICE PLAN VISUALIZER

User Manual Guidelines



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BLUVIUM INC

Application Description

An 'Invoice Plan Visualizer' is an application that describes and defines invoice schedules behavior. The primary objective of the application is to create invoice schedules plan for any object (primarily quotes) and provide the flexibility to change the billing frequency.

Benefits and Value

The app will refine the process of invoicing. The customer will be able to see plans for the upcoming schedules for the object which is prepared for him.

The app is compatible with any CPQ and Sales Cloud object with customizable schedules which gives more flexibility to user to create plan for invoice schedules. The app can change the billing frequency while generating invoice schedules from the object.

Platform requirements

Salesforce.com

Salesforce CPQ

Latest version of any browser listed below:

- Google Chrome

- Mozilla Firefox

- Apple

- Safari

- Microsoft Edge

Mobile Browsers:

- Mobile Safari (iOS) Latest stable version supported.

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

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1. Features Included in the Application

a. Generate invoice schedule plan on quote approval:

Upon approval of a quote, an automated process has been implemented to generate an invoice schedule plan with all the necessary data. This method eliminates the need for manual intervention ensuring that the billing process is initiated promptly on quote approval which saves time and streamlines your operations.

b. Generate schedules preview by toggling flag:

A checkbox, the Create Invoice Schedules plan, has been added related to the quote detail page, providing the sales team with the ability to manually create an invoice schedule whenever needed before quote approval (mainly can be used for legacy data). After quote approval this checkbox will be non-editable for sales reps. However, for the old quotes if a business wants to create invoice schedules, with the help of developers in batch apex we can create those schedules.

c. Generate invoice schedules with button click:

When quote is already approved following approval process, the quote checkbox field would be non-editable for schedule creation. However, to generate the invoice schedule plan for approved quote a sales rep will have an option where he will click on the button 'Generate Invoice Schedule'. A sales rep can also change the billing frequency as per customer's need via the button action.

d. First Invoice Schedule End Date:

A sales rep will have an ability to modify first invoice schedule duration as per customers need with the help of 'First Invoice Schedule End Date' field. This feature is mostly used if quote start date is in mid-year.

Current Year/Month End Date: For any invoice scheduled generated from a quote, the end date of the first schedule will default to the end date of the current year.

Contract End Date: The scheduling plan will determine the frequency based on the contract's end date, distributing the remaining term into the first segment accordingly.

Current Fiscal Year: Schedules will be created based on the fiscal year specified within the organization setup, tailored to meet specific business requirements.

Current Schedule End Date: For invoice schedules initiated from a quote, the end date of the first schedule will align with the existing schedule pattern.

e. Schedule plan can be added to quote document

By following the provided steps in manual, an invoice plan can be added to quote document if required.

2. 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 "Invoice Plan Visualizer" and click the search icon.
- iii. Locate the "Invoice Schedule Preview 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 the Invoice Schedule 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 Invoice Schedule Preview App.
Install for All Users: All users in your Salesforce org will have access to the Invoice Schedule Preview App.
- ix. Review the terms and conditions and click the "Confirm and Install" button
- x. The installation process will begin, and you'll be redirected to a progress page. Wait for the installation to be completed.
- i. Once the installation is finished, you will receive an email confirmation from the Salesforce.

b. Installation Setup in Salesforce Org:

- i. Once the installation is finished, you will receive an email confirmation from the 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 "Invoice Plan Visualizer". Click on the app icon to launch it.
- iv. The Invoice Plan Visualizer 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 "Invoice Plan Visualizer" App.

3. Application Navigation

- a. Go to the sales force application navigation and search for Invoice Plan Visualizer App.
- b. Click on the app name 'Invoice Schedule Preview' App. This will open the tabs which are necessary for manual configuration.
- c. The app will contain tabs/objects below:
 - i. Invoice Configuration
 - ii. Invoice Child Configuration
 - iii. Invoice Criteria

4. Manual Configurations:

- a. By default, the invoice schedule preview app is enabled for SBQQ_Quote__c object by creating its record in Invoice Configuration object.
- b. Complete remaining quote setup as below:
 1. Add 'Generate Invoice Schedule' button on quote page layout.
Create Quick Action with name as 'Generate Invoice Preview' and action type to be lightning web component. Add lightning component 'generateInvoice' to it.
 2. Add 'Create Invoice Schedules' checkbox on quote page layout.
 3. Add 'First Invoice Schedule End Date' on quote page layout.
Note: If you want 'Create Invoice Schedules' checkbox and 'First Invoice Schedule End Date' as non-editable after quote approval, please add the same on respective page layout as well.
 4. The Invoice Scheduler will work ONLY for the following Billing Frequencies: Annual, Monthly, Quarterly, Semi-annual, and Upfront. Please ensure that all necessary values are added to the Billing Frequency picklist field of Quote and remove invoice plan value from the list.
(Upfront: The user can use the upfront value to create a single invoice for the complete duration)
 5. Navigate to the 'Invoice Plan Visualizer' App and configure respective objects
 - Invoice Configuration Object – Update Object API name for the parent and child where invoice needs to be created.
 - Invoice Child Configuration – Update all the fields with matching identifier with the required field of child and parent object.

Quote Fields:

Quote Identifier	Quote Fields
BLIS__First_Invoice_Schedule_End_Date__c	First Invoice Segment
SBQQ__BillingFrequency__c	Invoice Frequency

Quote Lines Fields:

Quote line Fields	Quote line Identifier
Child Start Date	SBQQ__StartDate__c
Child End Date	SBQQ__EndDate__c
Child Net Total	SBQQ__NetTotal__c
Product Type	SBQQ__SubscriptionType__c

Note: Above fields are added as default. These fields can be changed as per business needs, however, make sure to add accurate API names.

- Invoice Criteria : If you want to create invoice schedule on the basis of some condition then we need to configure criteria.

Object

An object for which you want to apply criteria. (In this version only the object from respective parent Invoice Configuration record and Child Invoice Configuration will be considered)

Target Field

The field API name that evaluates only the field that appears on the Object.

Operator

Choose the logical operator that Salesforce CPQ uses to evaluate the target record against your filtered record.

Value

Define the actual value to be considered in criteria

6. Quote Document Setup:

- a. **Template Content** - Create a template Content record using the Custom type, then set the Content Name as 'InvoiceCustomVF.' In the Custom Source field, enter the value /apex/BLIS__InvoiceScheduleVF and save the record.
- b. **Template Section** - Create a Template Section record related to the Quote Template. Fill in the Section Name field with the desired value, select the Quote Template in the Template field, and select 'InvoiceCustomVF' in the Content field, which we recently created. Also, provide a value in the Display Order field.

7. Support and Troubleshooting

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



