

MRR for CPQ: Installation Guide

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Package Dependencies

The MRR for CPQ package requires the following packages to be installed before installation:

- Salesforce CPQ

Install MRR for CPQ

1. Navigate to the MRR for CPQ AppExchange listing and click 'Get it Now'

The screenshot shows the Salesforce AppExchange interface. At the top, the navigation bar includes 'AppExchange', 'Home', 'Explore', 'Collections', 'Consultants', and 'Learn'. A search bar is present. The main content area displays the app 'Cloud Giants: MRR and ARR in CPQ' with the description 'Natively Calculate Recurring Revenue'. It is marked as a 'Salesforce App' with 'No Ratings'. A red box highlights the 'Get It Now' button, which is next to a 'Try It Free' button and a heart icon. Below the buttons, the text states: 'Analyzing recurring revenue is critical for growth. Unlock the full potential of Salesforce CPQ with Cloud Giants' solution for calculating and analyzing MRR and ARR.' The app is listed as 'Free' with the note 'Never requires payment' and a link to 'Pricing Details'. Under 'Business Need', there are tags for 'Sales Intelligence', 'Quotes & Orders', and 'Forecasting'. Under 'Requires', there is a tag for 'Revenue Cloud CPQ' and a link to 'More Details'. At the bottom, there are tabs for 'Overview', 'Reviews', and 'More Details' (which is selected). Below these are three sections: 'Compatibility', 'App Details' (which is selected), and 'Security'.

2. Select whether you wish to install in a Production or Sandbox environment and select the Salesforce account where you wish to install the package.

Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

Don't see your account? [More Info](#)

Install in Production

Cancel

3. Confirm the Installation Details. Click 'Confirm and Install'.

Confirm Installation Details

Package	Version
MRR for CPQ (ver 1.0 / 1.0.0)	ver 1.0 / 1.0.0
Subscription	Organization
Free	
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	* Company
* Last Name	* Country
Job Title	* State/Province
* Email	
Phone	

* ☒ I have read and agree to the [terms and conditions](#).

☒ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

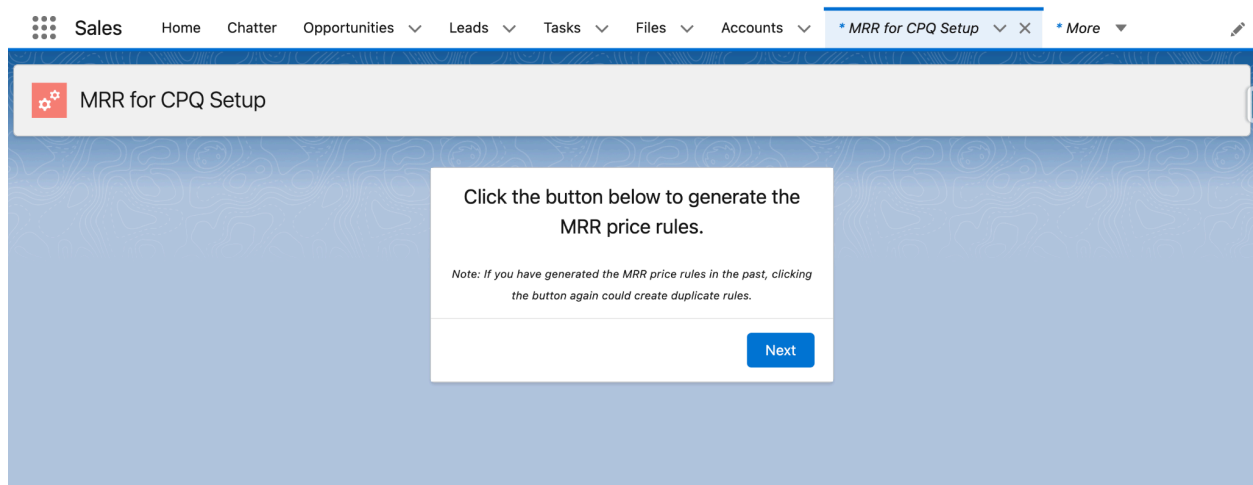
Cancel **Confirm and Install**

4. Select how you wish to install MRR for CPQ. We recommend selecting 'Install for Admins Only'. This option allows for more control over how permissions related to the app are assigned.

Post-Install Instructions

After MRR for CPQ has been Installed, complete the following steps:

1. Assign the MRR for CPQ Admin and MRR for CPQ User to the appropriate users.
 - a. MRR for CPQ Admin should be assigned to CPQ administrators. This permission set gives users access to
 - i. MRR for CPQ fields
 - ii. The MRR for CPQ Setup tab
 - b. MRR for CPQ User should be assigned to users who need to view MRR data. This permission set gives users access to
 - i. MRR for CPQ fields
2. Open the App Launcher and navigate to the MRR for CPQ Setup tab. Click through the screens to generate the MRR for CPQ price rules.



3. Add the MRR for CPQ fields on each object to the appropriate page layouts
4. Configure Scheduled or Record Triggered Flow to call the Subflow - Populate MRR Summary Fields flow. This flow rolls up the MRR values from Subscription to Contract. Use a Record-Triggered flow if you need MRR values to roll up to Contract in real-time, otherwise use a Scheduled Flow
 - a. Record-Triggered Flow
 - i. If you opt to use a Record-Triggered flow, you will need to create the flow on the Subscription object.

Note: A record-triggered flow on Contract will not work because CPQ does not update the contract when new subscriptions are generated. A flow interview will be executed for each subscription that is created on a contract.

- ii. Set up the Start element to match the following:

Configure Start

* Object

Subscription

Configure Trigger

* Trigger the Flow When:

☒ A record is created

☐ A record is updated

☐ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

Any Condition Is Met (OR)

	Field	Operator	Value	
	MRR4CPQ__Active_MRR__c	Is Null	False	
OR	MRR4CPQ__Delta_MRR__c	Is Null	False	
OR	MRR4CPQ__Latest_Subscription_MRR__c	Is Null	False	
OR	MRR4CPQ__MRR__c	Is Null	False	
OR	MRR4CPQ__New_Business_MRR__c	Is Null	False	
OR	MRR4CPQ__Renewed_MRR__c	Is Null	False	

+ Add Condition

* Optimize the Flow for:

Fast Field Updates

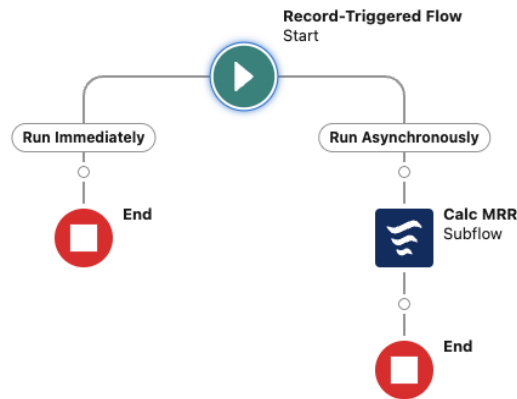
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☒ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

- iii. If using a record-triggered flow, we recommend calling the Subflow in an asynchronous path to help enhance performance.



- iv. The Subscription's Contract Id should be passed into the Subflow.

 Subflow - Populate MRR Summary Fields

• Label

Calc MRR

• API Name ⓘ

Calc_MRR

Description

Run the Subflow - Populate MRR Summary Fields to rollup fields from Subscription to Contract

Referenced Flow

 Subflow - Populate MRR Summary Fields ⓘ

Subflow_Populate_MRR_Summary_Fields



Use values from the parent flow to set the inputs for the "Subflow - Populate MRR Summary Fields" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "Subflow - Populate MRR Summary Fields" flow.

Set Input Values

A₃ contractId ⓘ

{!\$Record.SBQQ_Contract_id}



All Resources > Triggering SBQQ_Subscription_...

Relationship Fields

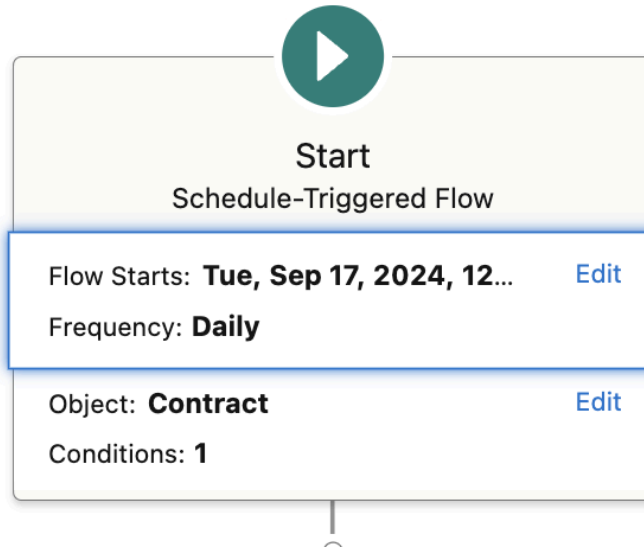
✓ A₃ Contract ⓘ

+ New Resource

 Included

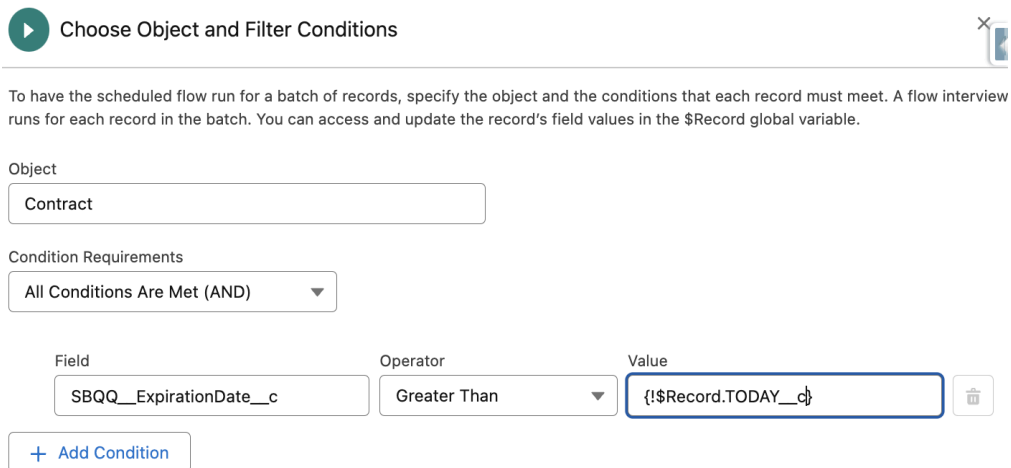
b. Scheduled Flow

- i. If you opt to use a Scheduled Flow, create the flow on Contract. Determine what frequency you want MRR values to roll up.



A configuration box for a 'Start' event, labeled 'Schedule-Triggered Flow'. It features a green play button icon at the top. The box is divided into three sections: the top section shows 'Flow Starts: Tue, Sep 17, 2024, 12...' with an 'Edit' link; the middle section shows 'Frequency: Daily'; and the bottom section shows 'Object: Contract' and 'Conditions: 1', both with 'Edit' links.

- ii. Specify the criteria of the Contracts you want to run the Subflow against. We recommend excluding contracts that have expired.



A configuration screen titled 'Choose Object and Filter Conditions' with a play button icon and a close button. Below the title is a text box explaining: 'To have the scheduled flow run for a batch of records, specify the object and the conditions that each record must meet. A flow interview runs for each record in the batch. You can access and update the record's field values in the \$Record global variable.' The configuration includes: an 'Object' dropdown set to 'Contract'; a 'Condition Requirements' dropdown set to 'All Conditions Are Met (AND)'; and a table for conditions with columns 'Field', 'Operator', and 'Value'. The first condition row shows 'SBQQ__ExpirationDate__c' as the field, 'Greater Than' as the operator, and '{\$Record.TODAY__d}' as the value. A '+ Add Condition' button is at the bottom left, and a trash icon is at the bottom right of the condition table.

Field	Operator	Value
SBQQ__ExpirationDate__c	Greater Than	{\$Record.TODAY__d}

- iii. Add the Subflow into the flow. The Contract's Id should be passed into the Subflow.

← Subflow - Populate MRR Summary Fields



* Label

Calc MRR

* API Name 

Calc_MRR

Description

Subflow - Populate MRR Summary Fields to roll up MRR from Subscriptions



Use values from the parent flow to set the inputs for the "Subflow - Populate MRR Summary Fields" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "Subflow - Populate MRR Summary Fields" flow.

Set Input Values

A_a contractId 

A_a [Triggering Contract > Contract ID](#) ×



Included