

Invoice Plan Visualizer

This application focuses on CPQ quote and quote line object, along with that it can be usable throughout any object with its generic nature. Though this application has a dependency on Salesforce CPQ package, removing the dependency of Salesforce CPQ package will be done in phase II to make this application a standalone in Sales cloud.

An Invoice Plan Visualizer is a structured plan that outlines the details of when invoice schedules will be generated, and payments are expected from customers.

The primary objective of “Invoice Plan Visualizer” is to create invoice schedules preview for any object (primarily quote) and provide the flexibility to change the billing frequency.

The key features and functionality are rotating around Quote object however a customer can create previews for other objects too.

Talking about quotes,

1. While preparing any quote for the deal, a sales representative will have authority to set/update billing frequency as per customer's need.
2. Also, a sales representative can create invoice schedules preview from the quote directly by triggering a flag from the quote just to show the plan of schedules to a customer.
3. A sales rep will have flexibility to whether to have the first invoice schedule ending at the current year end, contract end date, current fiscal year or to continue with the end date.
4. After preparing the quote for a customer, the quote will go for approval and once the quote is approved the schedules are being refreshed if any changes have been done meanwhile.
5. Moreover, after quote approval, in case of any requirement changes a sales rep can generate invoice schedules via provided button on quote.

For other generic objects,

1. After some manual configurations as per user manual guidelines where user needs to create required fields on other object, a user will be able to generate invoice schedules plan for any object.
2. A sales rep would have provided a button from where he will be able to generate invoice schedules as per billing frequency.

Supporting quote features and functionality

1. Generate invoice schedule plan on quote approval:



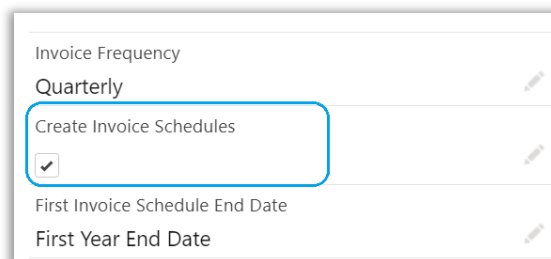
Quote Number	Q-00123
Primary	☒
Type	Quote
Status	Approved

Fig. 1 Quote Approval

Upon approval of a quote, an automated process has been implemented to generate an invoice schedule 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.

2. Generate schedules plan by toggling flag:



Invoice Frequency	Quarterly	
Create Invoice Schedules	☒	
First Invoice Schedule End Date		
First Year End Date		

Fig. 2 Quote Checkbox

A checkbox has been added to the quote detail page, providing the sales team with an ability to manually create an invoice schedule whenever needed before quote approval.

After quote approval this checkbox will be non-editable for sales reps. However, for the antiquated/old quotes if a business wants to create invoice schedules, with the help of developers in batch apex we can create those schedules.

3. Generate invoice schedules plan with button click:

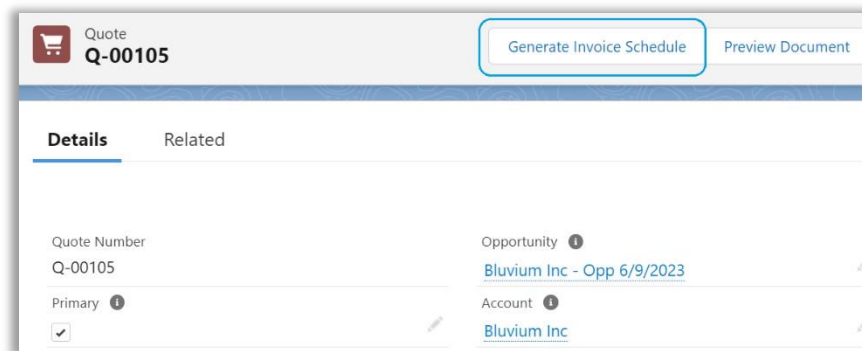


Fig. 3 Button action to create schedules.

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 for an 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.

This button can be available for any object for which a user wants to create invoice schedules by referring user manual guidelines.

4. Additional Feature - First Invoice Schedule End Date

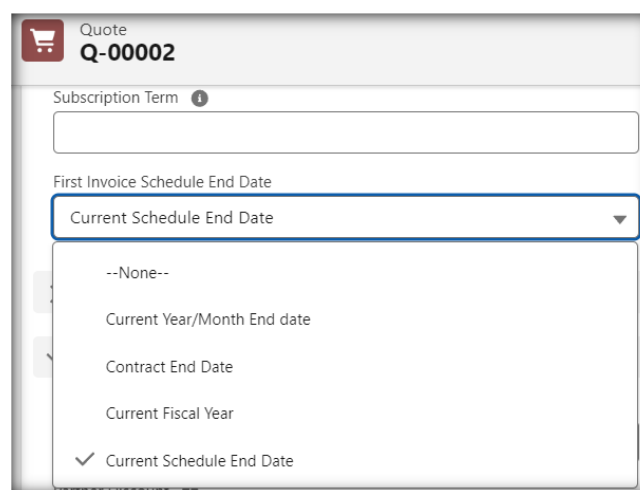


Fig. 4 Customizable first schedule

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 mostly used if the 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.

Configuration object schema

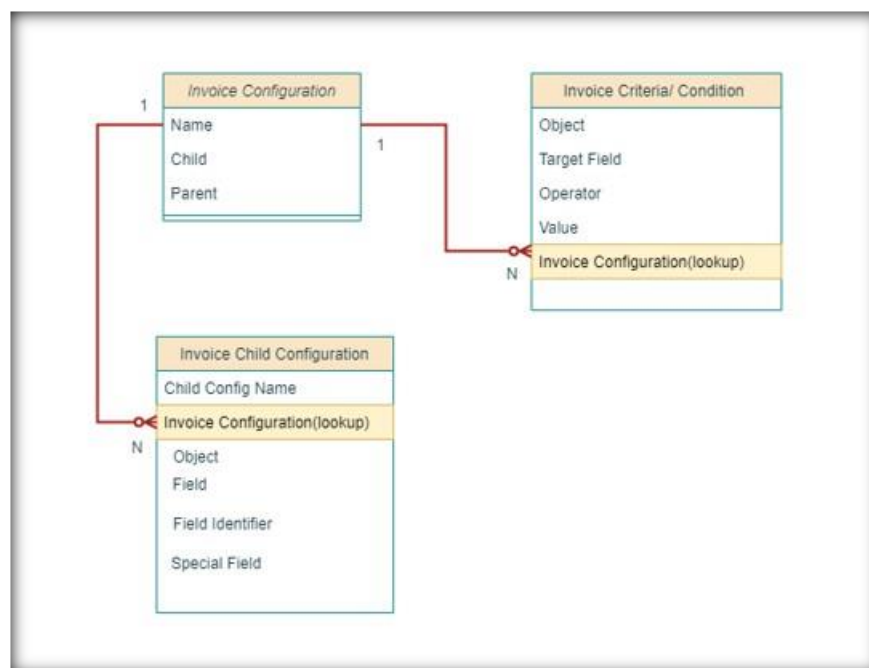


Fig. 5 Configuration Object Schema

Users will perform setup configurations around these objects to get invoice schedules created for any object.

These are the objects where a user will configure the parent and child object with some criteria if needed as per business requirement.

'Invoice Configuration' object is configured with parent object details (object from which invoice schedule will be created via button).

The ideology of the "Invoice Child Configuration' object is configured with child object details (object for which invoice schedules should be created).

The objective of "Invoice Criteria" is configured with conditions for parent and child object to be considered in invoice schedule creation.

Note: More details on configurations will be added in the user manual guidelines.

