RevenueCloud Administration Guide – Winter 2024

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Certified 100% Salesforce Native

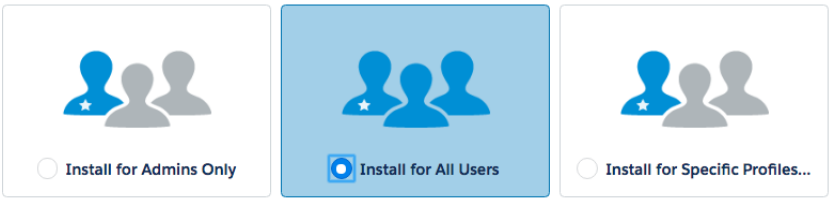
RevenueCloud is 100% Salesforce Native. There are no external SaaS systems or websites. RevenueCloud runs only in Salesforce. Your RevenueCloud data will reside only in your Salesforce org.

RevenueCloud has a Lightning Experience styled UI which works equally well when running in Lightning Experience and Salesforce Classic.

RevenueCloud App Installation

Install RevenueCloud - Provide Access to All Users (default)

If you are installing in Developer, Enterprise or Unlimited Editions, you will be asked to choose a security level during install. Choose Provide Access to all Users. This provides access to the necessary components of the App to your users, while supporting your existing Opportunity object security settings. Users will only be able to access RevenueCloud in Opportunities they have access to. In order to gain access to RevenueCloud, users will need these permissions and a RevenueCloud user license.



Custom Security Configuration (advanced)

Experienced Salesforce Administrators with Enterprise Edition and above, Orgs may choose to configure security manually, which will require granting read / write / delete access to all of the RevenueCloud Custom Objects and also granting access to all of the RevenueCloud Apex Classes and Visualforce Pages. This approach requires more effort and more clicks and should only be performed by experienced Salesforce Administrators who are knowledgeable in Salesforce Security Configuration. If this approach is chosen, it is advantageous to use Salesforce Permission Sets for ease of management.

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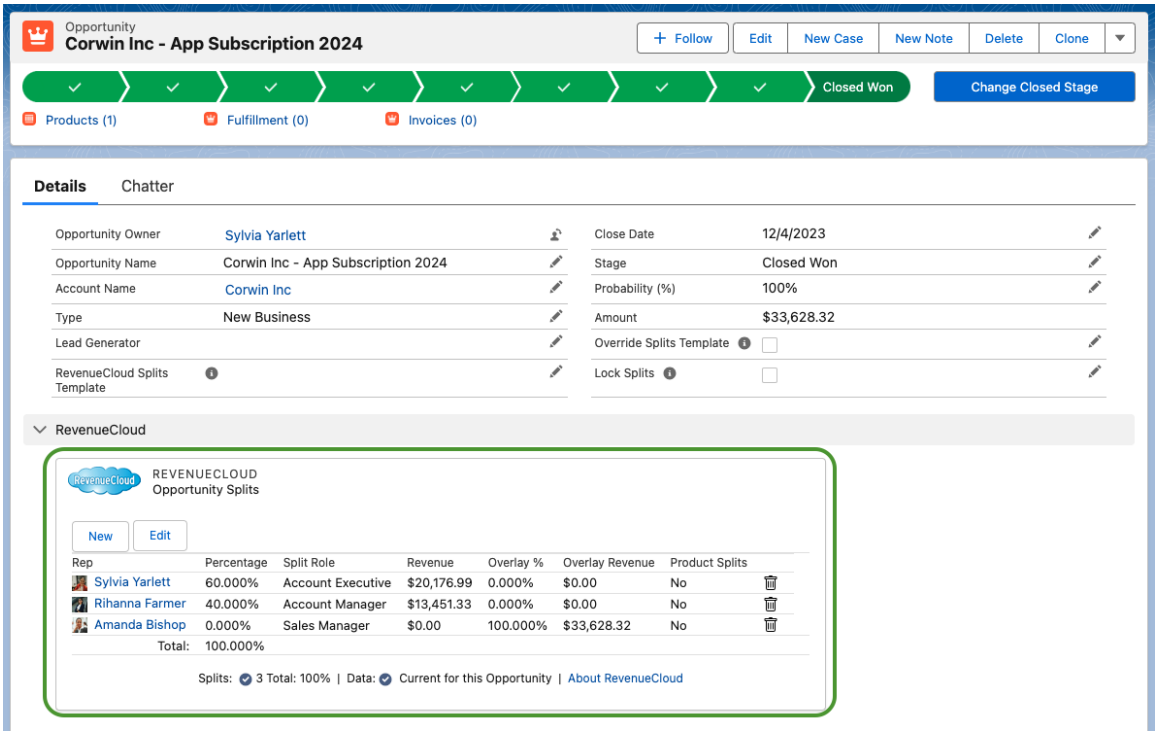
How to Upgrade RevenueCloud

To upgrade RevenueCloud to a newer package version, simply follow the same process to install the newer RevenueCloud Package and Salesforce will update RevenueCloud while preserving your existing RevenueCloud data any custom fields you've created on the RevenueCloud objects.

Configuration – Install RevenueCloud Panel on the Opportunity page layout

Tip: *RevenueCloud includes an inline Visualforce page for managing your Opportunity Splits called "RevenueCloud Panel". This must be added to your Opportunity Page Layout.*



Create a new section on the Opportunity page layout

Navigate to your Opportunity Page Layout:
Go to Setup->Customize->Opportunities->Page Layouts, Click "Edit" on the Opportunity page layout of your choice. Create a new section in your Opportunity page layout. Name the section "RevenueCloud", Select "1-Column", Un-Check "Edit Page" and click OK.

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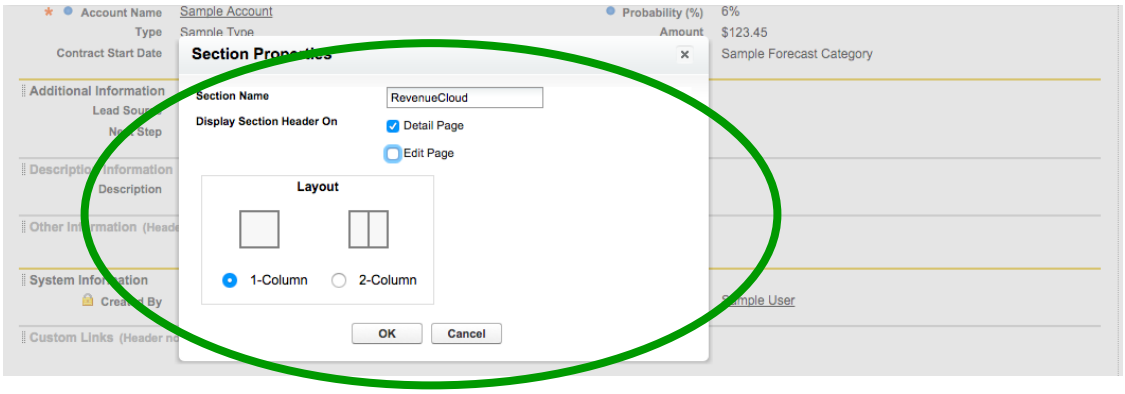
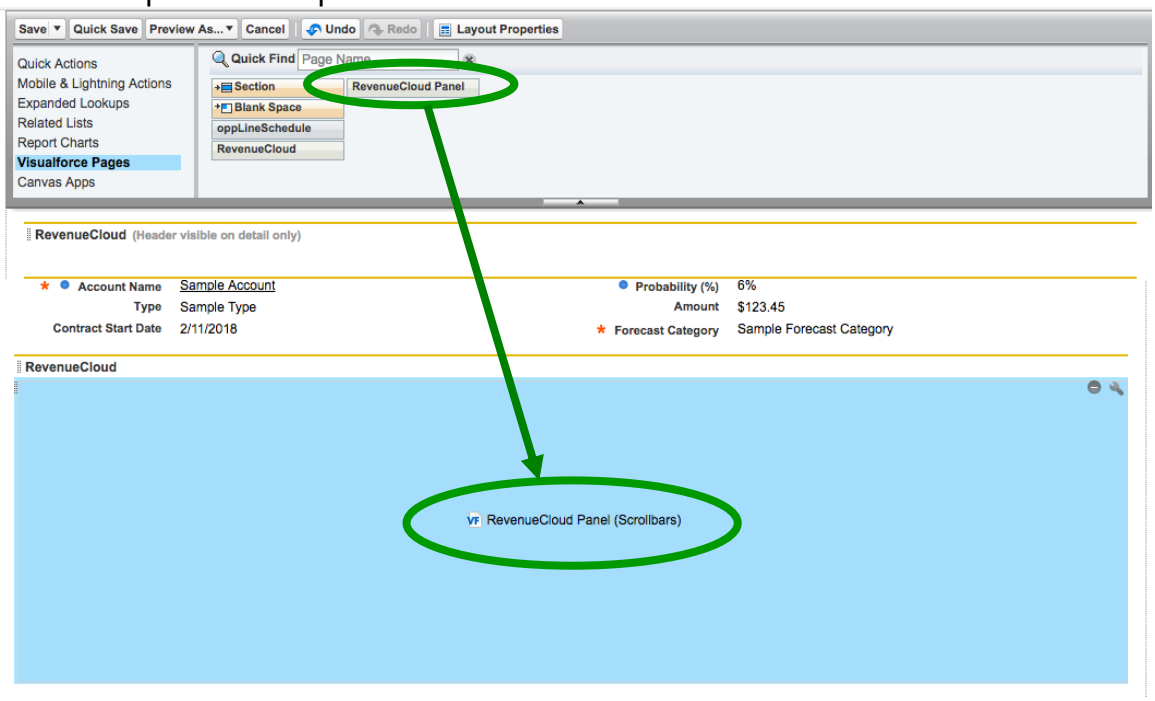


Tip: *Be sure that you use the "RevenueCloud Panel" on the Opportunity Page layout. There is also another Visualforce page called "RevenueCloud" that is the RevenueCloud Tab and it should not be used on the Opportunity Page layout.*

Add RevenueCloud Panel inline VF page to Opportunity page layout

Select Visualforce Pages and drag "**RevenueCloud Panel**" to your new section created in previous step.



Configure the RevenueCloud Panel Visualforce page properties

Click on the little wrench icon in the upper right of the section to set properties for the Visualforce page: "RevenueCloud Panel".

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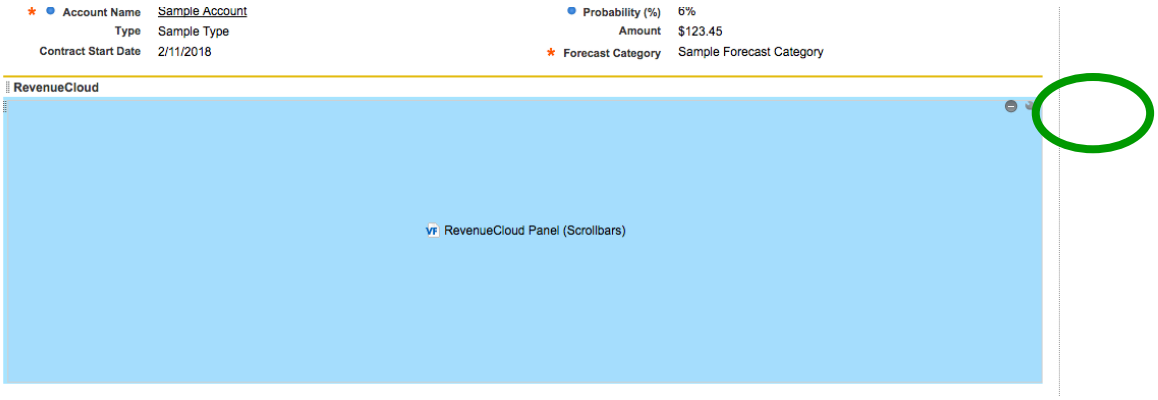
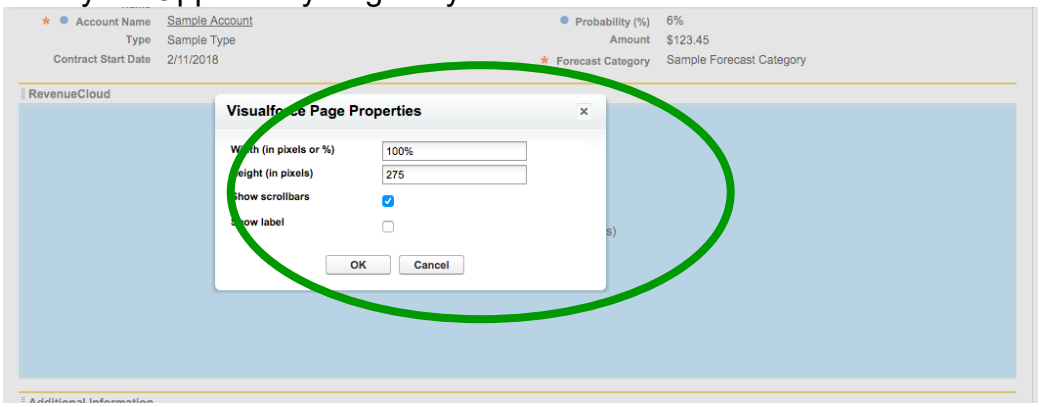


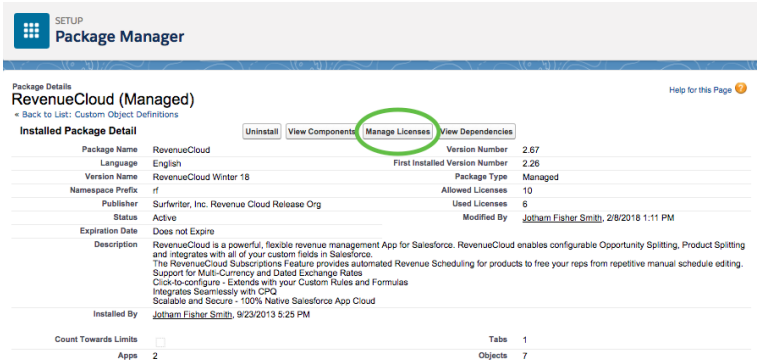
Accept the default of 100% width and set the height to 275 pixels, Select the checkbox for “Show Scrollbars” (*leave “Show Label” unchecked*) and click “OK”. Save your Opportunity Page Layout.



Configuration – Assign RevenueCloud Licenses to Users

Assign Licenses Important! (Production Orgs Only)

In Production and Developer Orgs, users must be provisioned with permissions and RevenueCloud licenses in order to use the RevenueCloud App or view the RevenueCloud data. In Sandboxes all users are provided licenses however you must still choose “Provided Access to All Users” during install to grant permissions.



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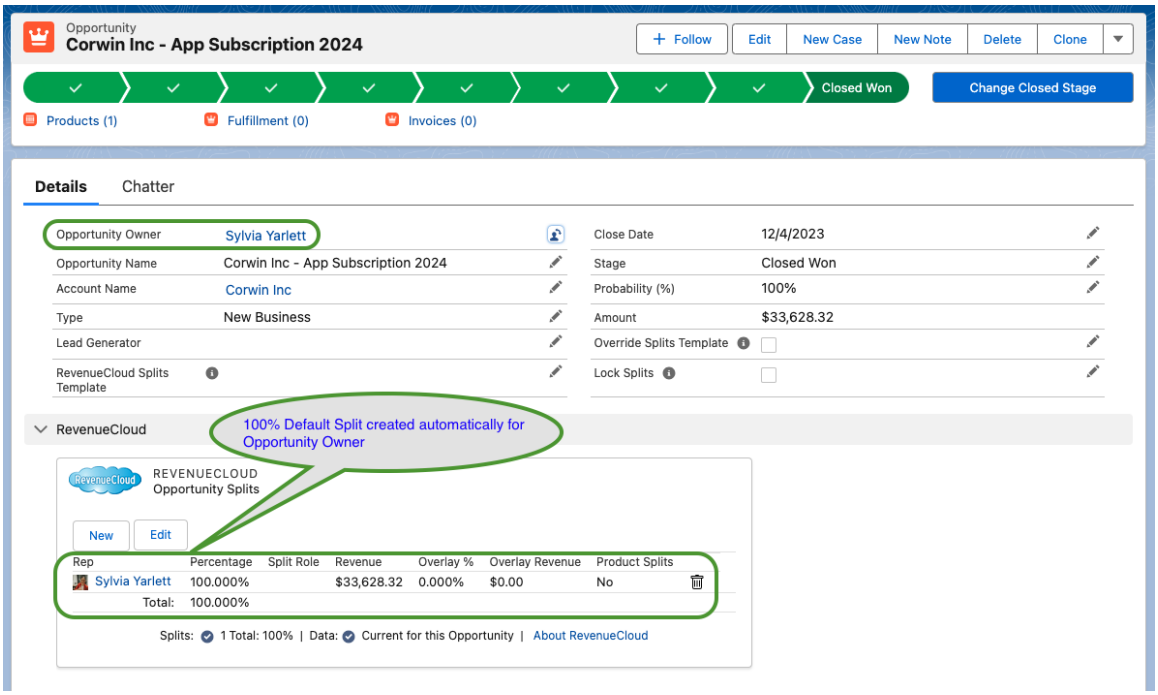
To assign licenses, navigate to Setup->Installed Packages->RevenueCloud and click on “Manage Licenses”. Assign licenses to the users that you want have access to RevenueCloud. You can also assign licenses from the “Managed Packages” related list on the User Detail.

Quick Start – Opportunity Splits

Tip: *Be sure you’ve added the “RevenueCloud Panel” (Visualforce Page) to the Opportunity Page layout as described above.*

Create Opportunity Splits in RevenueCloud

If you’ve just installed RevenueCloud, you can create a new Opportunity and it will be given a default 100% split for you, the Opportunity owner. Alternatively, you can browse to an existing Opportunity. If it hasn’t been edited by a RevenueCloud-licensed user since you installed RevenueCloud, it will not have a default 100% split for the Opportunity owner. To add a default 100% split, simply click “Edit” and “Save” on the Opportunity and a default 100% split for the Opportunity owner will be added automatically by RevenueCloud.



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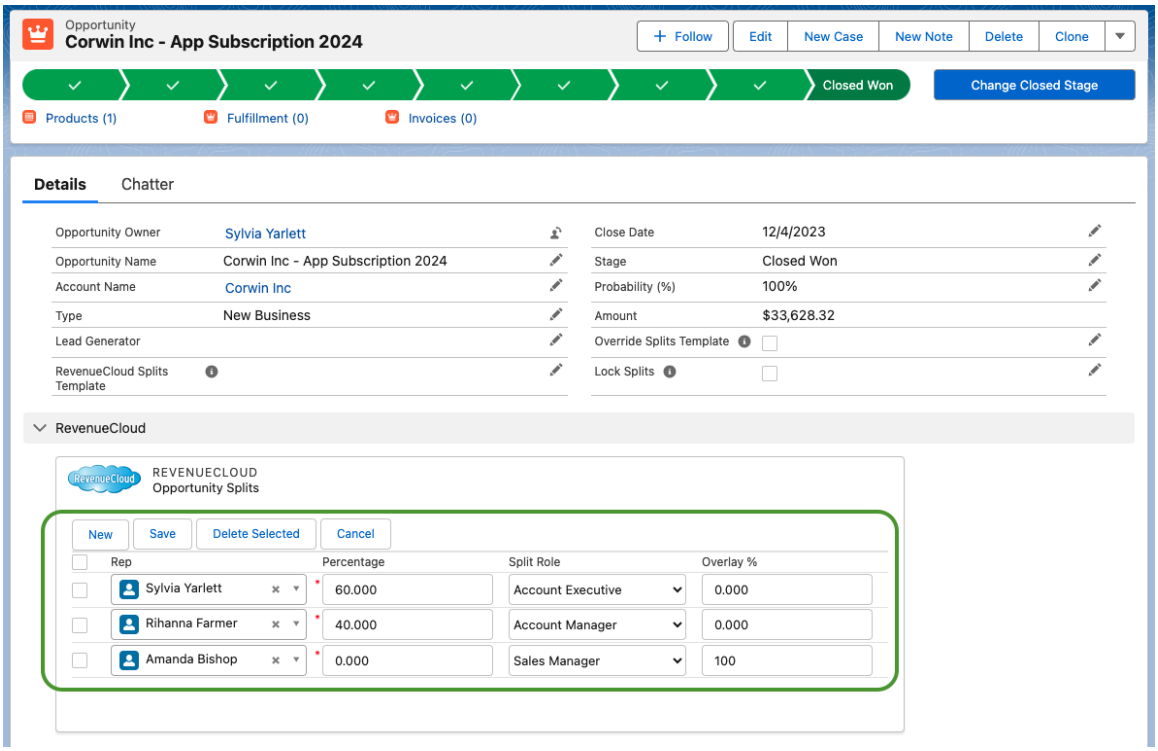
Add Additional Reps to Opportunity Splits

to split the Opportunity Revenue between multiple Reps, click “New”, select another Rep and set your split percentages. You may distribute the Split Percentages to Reps however you like, but the total of the percentages must always equal 100%.



That’s it! Your split Opportunity data has been generated in RevenueCloud. You can now navigate to a RevenueCloud “My Revenue” report to view or download your data to Excel. You may also utilize the additional included overlay and commission fields or create your own custom fields on the Revenue Split object and then add them to the Revenue Splits field set to include them in the user interface.

It is best practice to remove any fields that you are not using from the Revenue Split and Product Splits interfaces (via the field sets) to keep the user interface clean.

Use RevenueCloud with Opportunity Products

You can add, modify and delete Opportunity Products and RevenueCloud will continuously update its data to reflect the percentages that have been established in your RevenueCloud splits. When you add an Opportunity Products, RevenueCloud will create a RevenueCloud Product (RC Product) record for each Opportunity Product and one RevenueCloud Line Item Schedule (RCLIS) record underneath it for each Rep.

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Use RevenueCloud with Salesforce Standard Quantity & Revenue Schedules

RevenueCloud has seamless support for Salesforce Standard Opportunity Line Item Schedules (OLIS). You can create, update or delete OLIS as you wish and RevenueCloud will update its RevenueCloud Line Item Schedule (RCLIS) as you make changes. RevenueCloud will generate one RevenueCloud Line Item Schedule (RCLIS) entry for each Rep for each OLIS entry. So a 12 month standard Salesforce schedule (12 OLIS) with a 50/50 Opportunity split in RevenueCloud will produce 24 RCLIS under the associated RC Product.

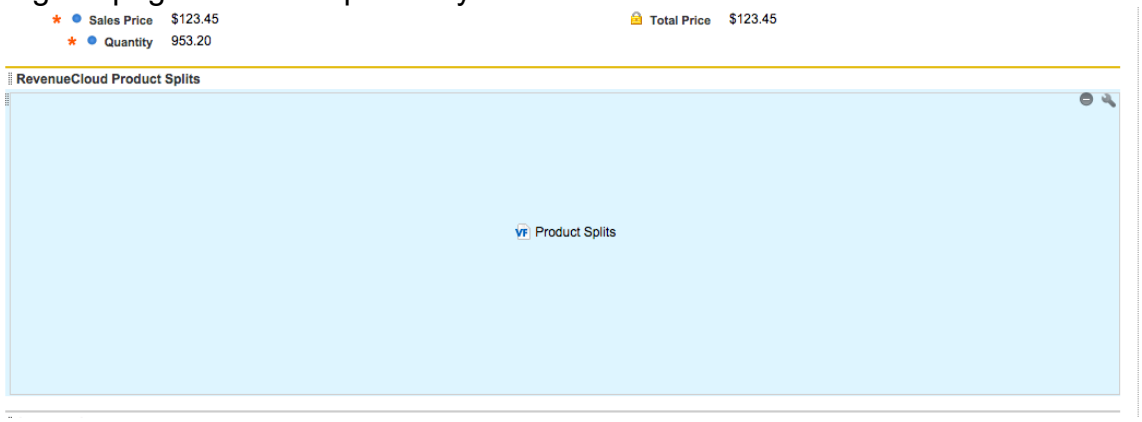
Configuration - RevenueCloud Product Splits

When you create splits in RevenueCloud, they will always apply automatically to all Products and in the Opportunity. RevenueCloud also supports different splits for individual Opportunity Products. You can think of RevenueCloud Product Splits as overrides of the split percentages that apply to particular Opportunity Products.

To enable Product Splits for your org, add the Product Splits inline Visualforce Page to a new section in the Opportunity Product page layout just like the RevenueCloud Panel was added to a new section in the Opportunity page layout.

Add VF page to the Opportunity Product page layout

Create a new section on your Opportunity Product Page layout and name it “RevenueCloud Product Splits” as shown. Select “Visualforce Pages” and then drag the page “Product Splits” to your new section.



Click on the little wrench icon on the upper right of your new section and set the Visualforce page properties as shown below. Width: 100%, Height: 275, Show scrollbars: checked, Show label: unchecked. Click “OK”, and then save your Opportunity Product page layout.

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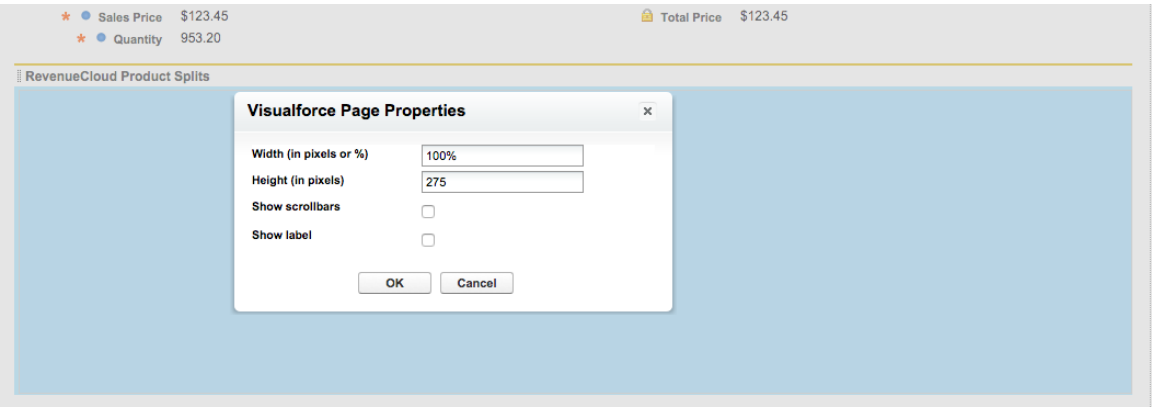
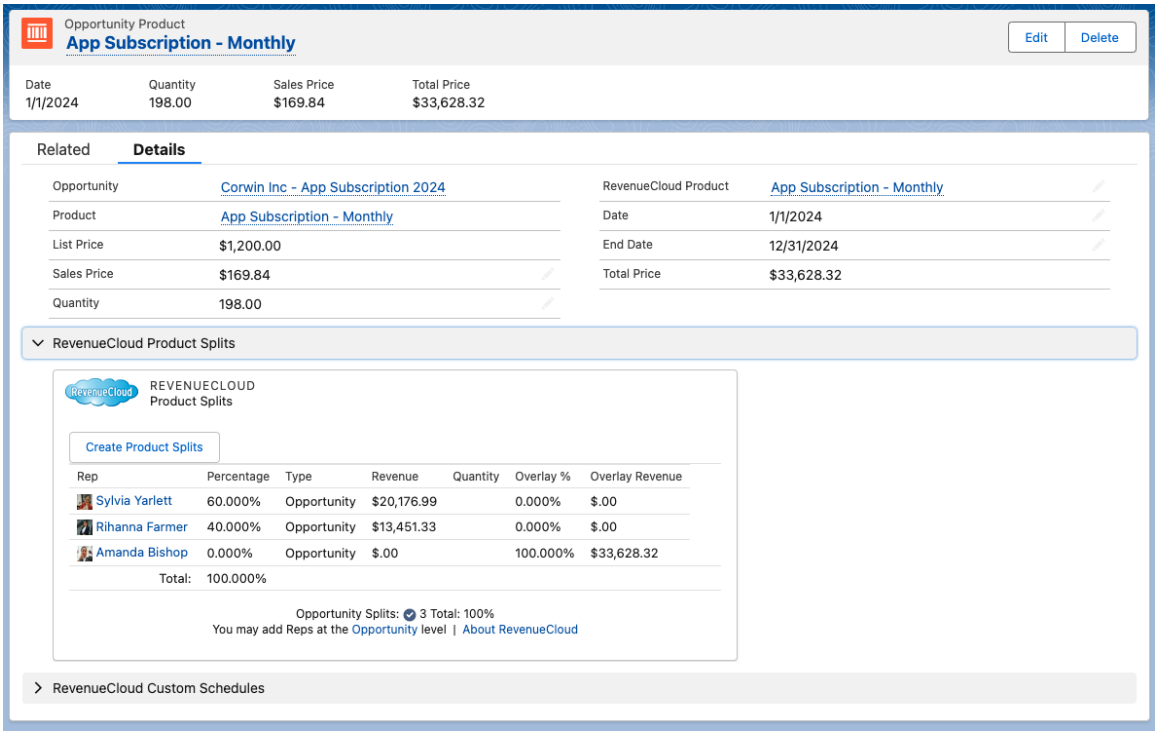


Quick Start – Product Splits

View the RevenueCloud Product Splits Interface

Browse to an Opportunity Product in an Opportunity that has previously been edited since installing RevenueCloud (so RevenueCloud data is current).

If no Product Splits have been created, the Product Splits interface will reflect the Opportunity Splits and show the type as “Opportunity Splits”.



Tip: *To add a new Rep for use in a Product Split, add them to Opportunity Splits on the Opportunity page and set their split percentage to zero.*

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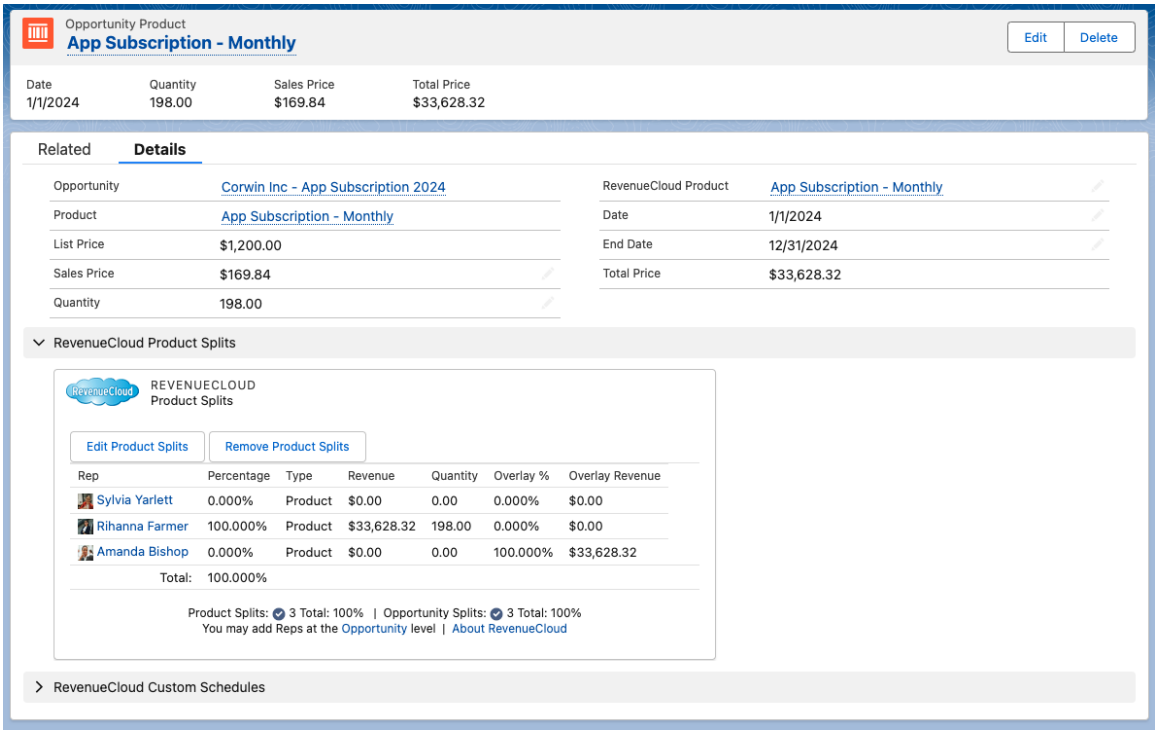
Create Product Splits

Click “Create Product Splits”. You may now configure the split percentages as and click “Save”. Now the type will show “Product Splits”. This indicates that there are Product Splits configured for this Opportunity Product. In this example, we have set Catherine’s share of this particular Opportunity Product to 0% and Seth’s share to 100% which will give all of the credit for this product to Seth in RevenueCloud reports.



Remove Product Splits

To remove Product Splits, click “Remove Product Splits”. After the interface refreshes, you will see the Opportunity Split percentages and the field “Split Type” will have reverted to “Opportunity”.

Add additional Reps to Product Splits

All Reps are added at the Opportunity Splits Level. To add a Rep for use only in Product Splits, you can add them to the RevenueCloud Opportunity splits and set their Split Percentage to 0%. Then you can set their percentages for Product Splits on any Opportunity Product.

Configuration – RevenueCloud Auto-Schedule

The RevenueCloud Auto-Schedule feature automatically creates monthly Quantity and Revenue Schedules between Start Dates and End Dates on Opportunity Products to provide Revenue Recognition reporting of revenue, weighted pipeline and more to your existing Opportunities.

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Advantages of RevenueCloud Schedules

Salesforce Standard Opportunity Line Item Schedules (OLIS) are totally manual to create and update and they render the Product Quantity and Sales Price fields read-only preventing Opportunity Products from being edited by Salesforce CPQ.

RevenueCloud Line Item Schedules (RCLIS) are automatically created and updated by RevenueCloud each time Opportunity Products are created and edited; all without making any changes to Salesforce standard data.

The fact that RCLIS are created automatically by RevenueCloud Auto-Schedule and that RCLIS do not block you from editing your Opportunity Product Quantity and Sales Price makes the RevenueCloud Auto-Schedule feature a very efficient solution for enabling automatic revenue scheduling with ad server integrations, Salesforce CPQ and more!

RevenueCloud Schedules vs. Salesforce Standard Schedules

Feature	Salesforce Standard Schedules	RevenueCloud Schedules
Lightning Ready	Yes	Yes
Automatic scheduling	No	Yes
Quantity & sales price fields writeable on Opportunity Product	No	Yes
Integrates seamlessly with Salesforce CPQ	No	Yes
Optionally prorated by days in month	No	Yes
Supports custom fields	Yes	Yes
Schedules actually split between multiple users in API	No	Yes

To enable the RevenueCloud Auto-Schedule feature for your org, you simply enable the feature in RevenueCloud custom settings, add a couple fields to page layouts and enable Auto-Schedule for the product records of your choice.

Enable Auto-Schedule in the RevenueCloud Setup custom setting

Navigate to “Custom Settings” in Salesforce Setup. Locate the “RevenueCloud Setup” Custom Setting and click “Manage”. Then locate the Default Organization Level and click New.

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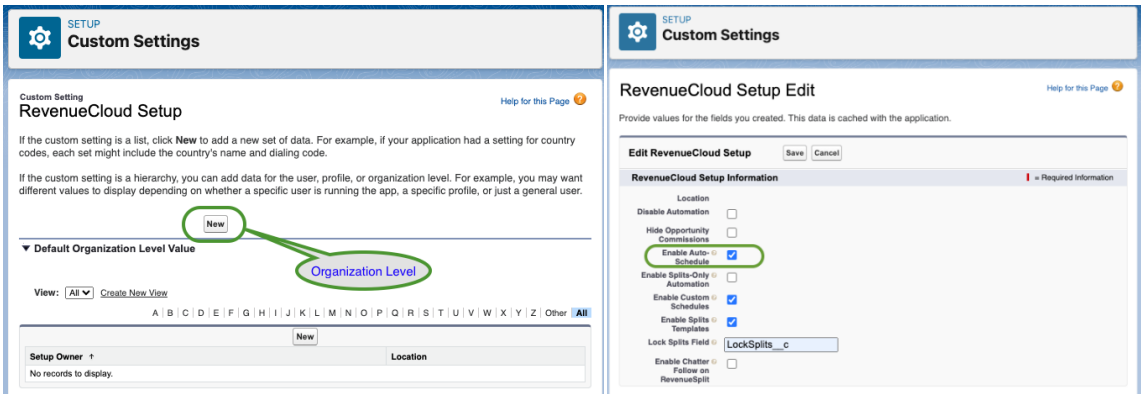
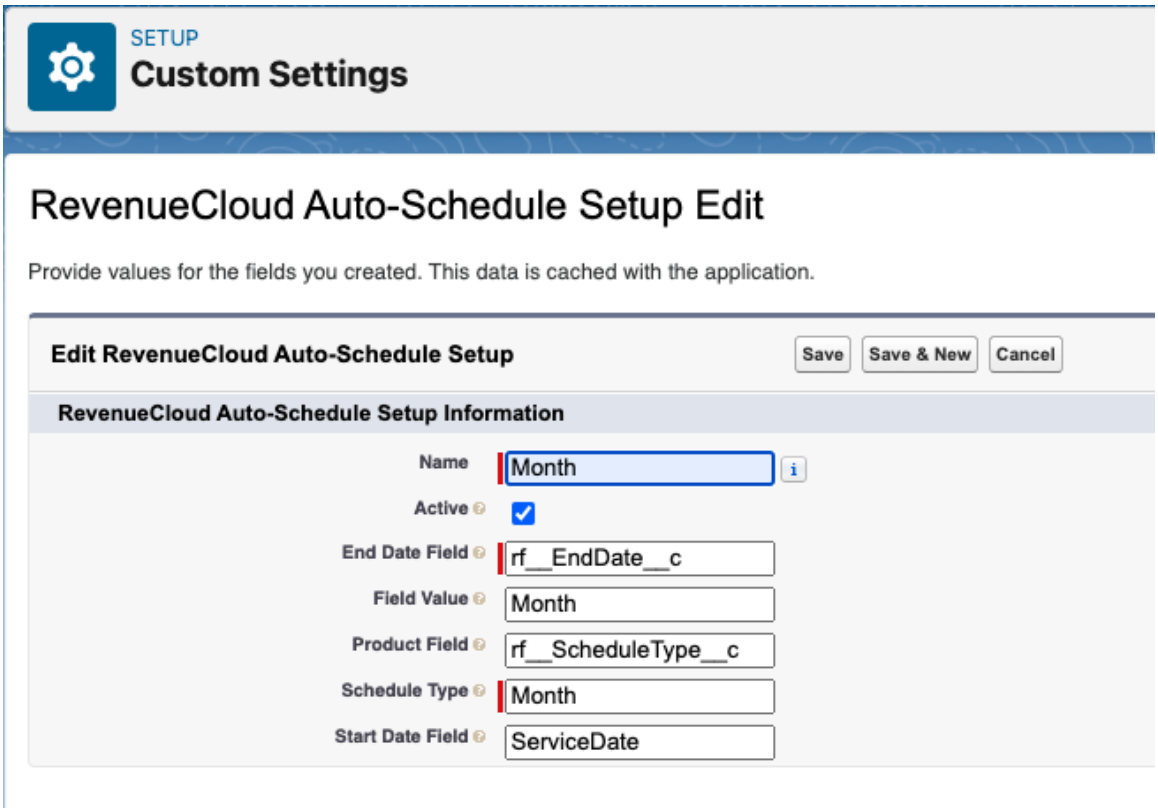


Create a RevenueCloud Auto-Schedule setup entry

The next step is to create at least one Schedule Type in the “RevenueCloud Auto-Schedule Setup” list custom setting. Navigate to “Custom Settings” in Salesforce Setup. Locate the “RevenueCloud Auto-Schedule Setup” Custom Setting and click “Manage”, then Click “New”. Populate the schedule with the API names of fields as shown in the screenshot below and according to field descriptions in the table that follows the screenshot.



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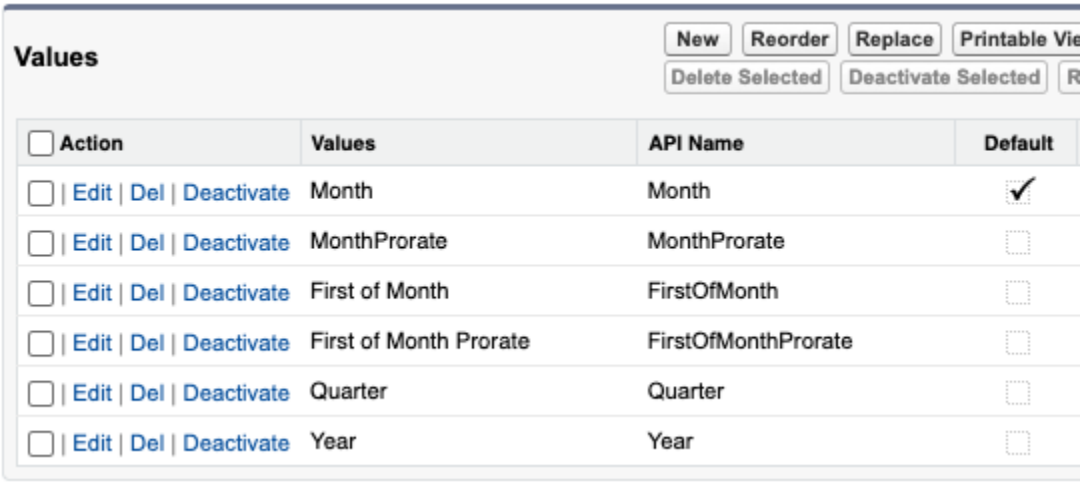
RevenueCloud Auto-Schedule Setup custom setting fields

Field	Description
Name	Name of Schedule setting entry
Active	Schedule Entry Enabled set to True
End Date Field	API Name of field on Opportunity Product to use as the Schedule End Date. If you already have an existing field, you can use that or use the field which installs with RevenueCloud rf__EndDate__c
Product Field	Field to use on Product Records to enable them for schedules of the schedule type declared in the setting entry. Enter the the API name of the included picklist field rf__ScheduleType__c. Alternatively, you can reference the API name of another custom field or “Id” for Product2 record Id.
Field Value	Value of “Product Field” declared on Opportunity Product to enable schedules of this type. If you’re using the rf__ScheduleType__c picklist, you can enter the picklist value for this entry such as “Month”. If you’re using Id for Product Field, then you would enter the Id of the Product record. If you’re using a checkbox field for Product Field, then you would enter “true”
Start Date Field	API Name of Field on Opportunity Product to use as Schedule Start Date. Enter the standard “ServiceDate” field or your own custom start date field.
Schedule Type	Accepts "Month" for evenly divided monthly schedules on same day as Start Date, "FirstOfMonth" for evenly divided schedules set on 1st day of each month, "MonthProrate", "FirstOfMonthProrate" for monthly schedules prorated by the number of days in months and accounting for partial start and end months, “Quarter” and “Year”.

Schedule Type Picklist Options

The Schedule Type picklist contains an entry for each schedule type supported by Auto-Schedule. Create your custom setting entries to the API names of the schedule type picklist entries.



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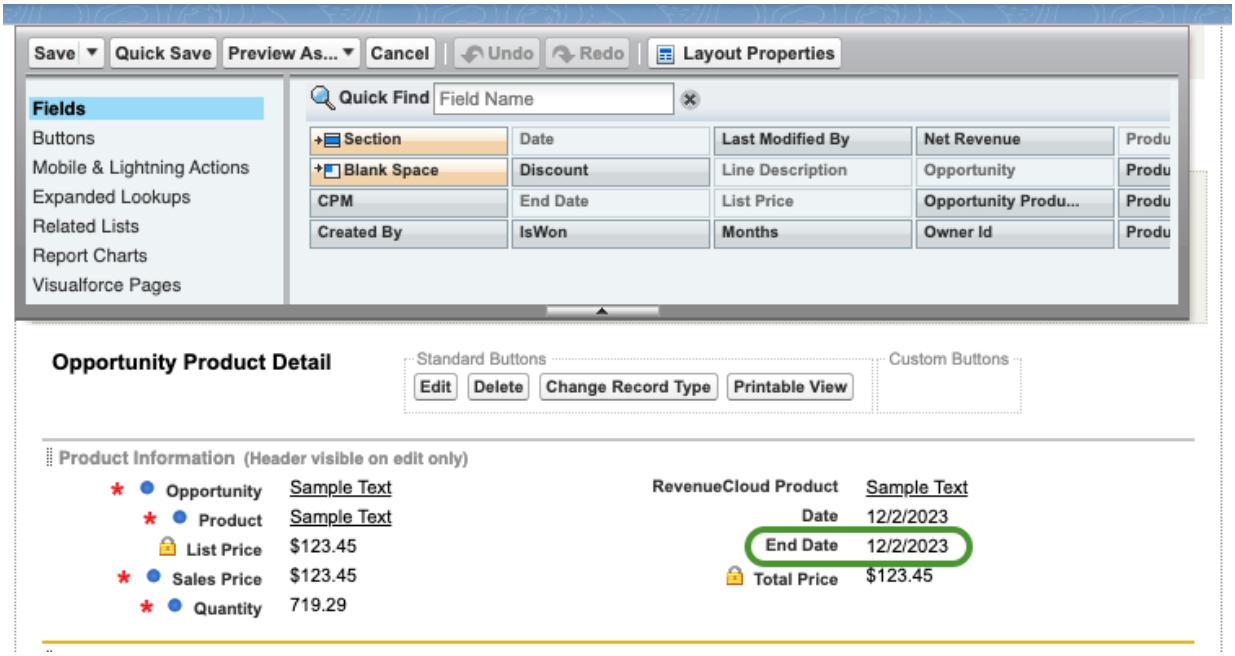
Add End Date Field to Opportunity Product page layout.

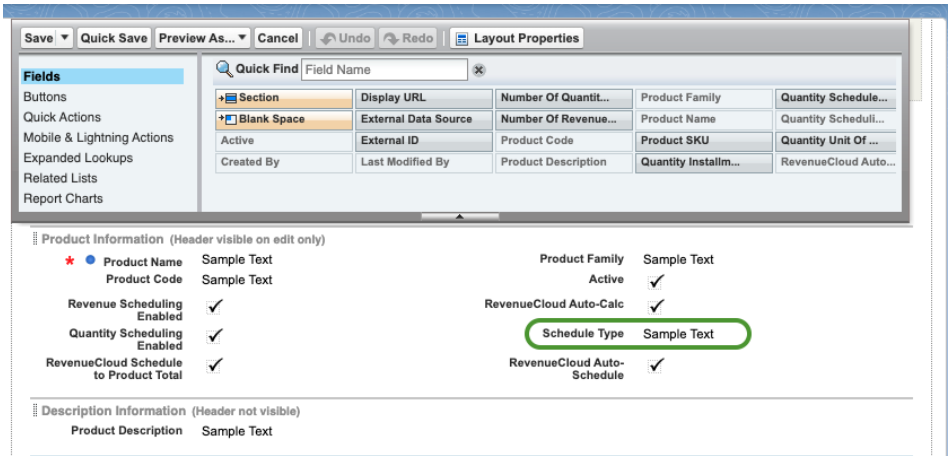
Tip: *If you already have an End Date field on Opportunity Product and you have referenced that field in your RevenueCloud Auto-Schedule Setup entry you can skip this step.*

Navigate to Opportunity Products in Salesforce Setup, select the page layout for Opportunity Products and click “Edit”. Add the End Date field that you referenced in your RevenueCloud Auto-Schedule Setup Custom Setting entry. You should also add the field to the Mini Page Layout and Multi-Line Layouts so that the End Date Field will be editable in all of the standard Salesforce editing interfaces.



Add Schedule Type picklist field to Product page layout

Navigate to the Product object in Salesforce setup, select the page layout and click “Edit”. Add the “Schedule Type” field to the page layout.



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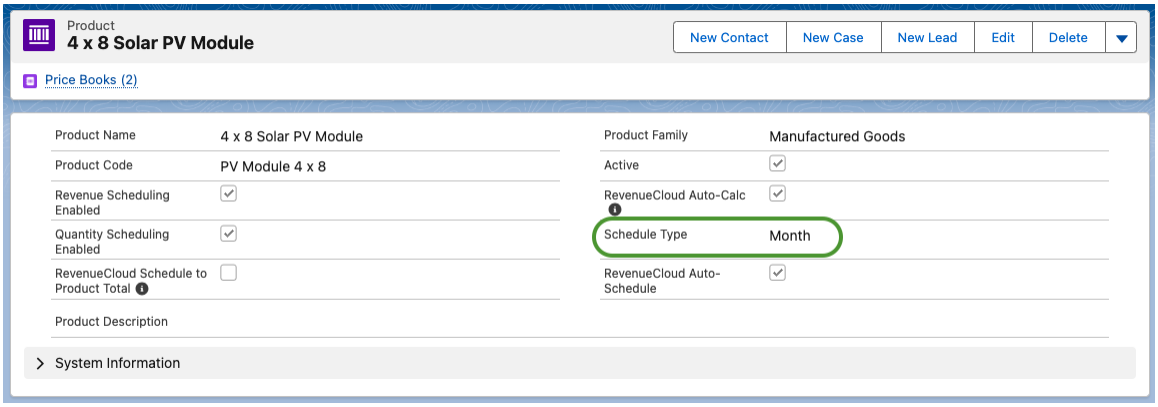
Quick Start – RevenueCloud Auto-Schedule

Enable RevenueCloud Auto-Schedule for a product

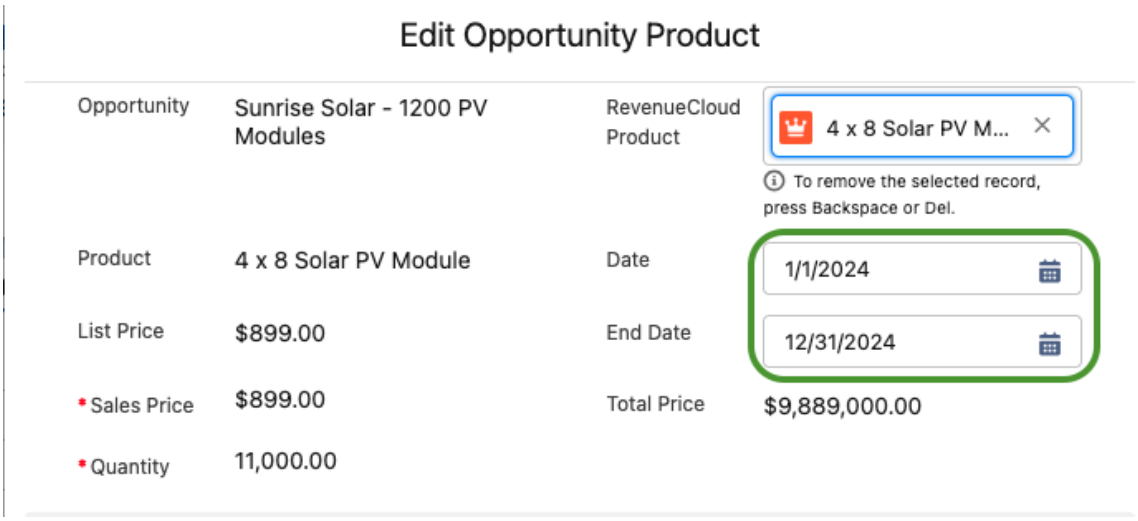
Navigate to Products, select a product and set the Schedule Type picklist field to the type of schedules you want generated for Opportunity Products that reference this Product record such as “Month”.



Generate Schedules for Opportunity Products

Tip: *Be sure that a Schedule Type is enabled on the product referenced by the Opportunity Product.*

Navigate to an Opportunity Product or create a new one. Set Quantity, Sales Price, Start Date, End Date and Save.



View Schedules in the RevenueCloud Custom Schedules Interface

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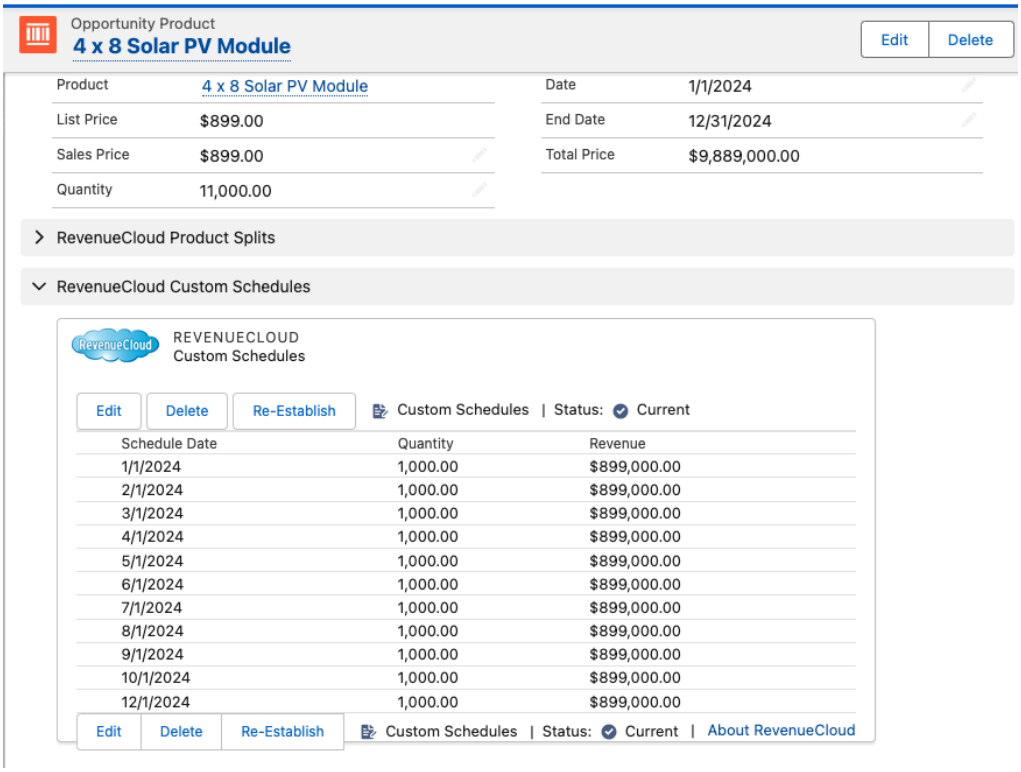
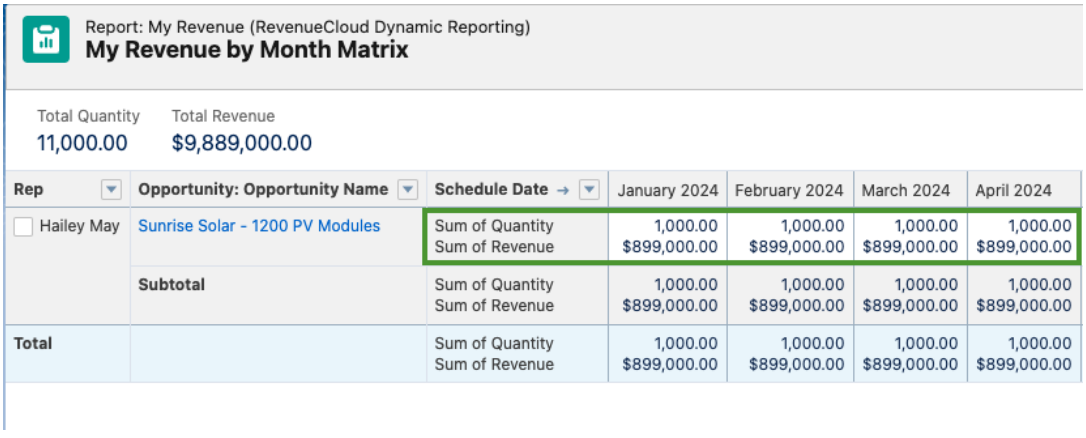
If you have the Custom Schedules Interface included on your Opportunity Product page layout, then you can view the RevenueCloud RCLIS on the Opportunity Product Page as shown in the screenshot below.



View Scheduled Quantity and Revenue in Salesforce report

Open a RevenueCloud “My Revenue” report and view the scheduled revenue. In this example we’ve filtered the report to the single Opportunity. The report displays monthly amounts for Jan – Dec. The screenshot displays the first 4 months, Jan – April, in order to fit on the page.



Rep	Opportunity: Opportunity Name	Schedule Date →	January 2024	February 2024	March 2024	April 2024
Hailey May	Sunrise Solar - 1200 PV Modules	Sum of Quantity Sum of Revenue	1,000.00 $899,000.00	1,000.00 $899,000.00	1,000.00 $899,000.00	1,000.00 $899,000.00
	Subtotal	Sum of Quantity Sum of Revenue	1,000.00 $899,000.00	1,000.00 $899,000.00	1,000.00 $899,000.00	1,000.00 $899,000.00
Total		Sum of Quantity Sum of Revenue	1,000.00 $899,000.00	1,000.00 $899,000.00	1,000.00 $899,000.00	1,000.00 $899,000.00

Override Auto-Schedule with Salesforce Schedules

You can generate and edit Salesforce Schedules on Opportunity Products that

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are configured for RevenueCloud Auto-Schedule. RevenueCloud will sync to your Standard Salesforce Product Schedules instead of performing its automatic scheduling. This enables you to create schedule entries with uneven or custom amounts when required.

The Salesforce standard schedule entries will be split into RevenueCloud Line Item Schedules according to the existing RevenueCloud Opportunity Splits and Product Splits. If you delete the standard Salesforce schedules, then RevenueCloud Auto-Schedule will automatically regenerate its evenly divided or prorated RCLIS according to the Start Date, End Date and schedule type you've configured for the Opportunity Product.

Configuration – RevenueCloud Custom Schedules

The RevenueCloud Custom Schedules feature supports creating and editing Salesforce Product Schedules in Lightning and Classic with the option to add actual quantity, actual revenue and your own Custom Fields!

About RevenueCloud Custom Schedules

The RevenueCloud Custom Schedules feature extends Salesforce Product Schedules to enable you to establish and edit Salesforce Product Schedules in Lightning and Classic with support for your own custom fields and seamless integration with RevenueCloud Opportunity and Product Splits.

Custom Schedules may be established as "Quantity", "Revenue" or "Both" and may be "Divided" or "Repeated" as "Daily", "Monthly", "Quarterly" or "Yearly".

RevenueCloud Custom Schedules vs. Salesforce Product Schedules

Feature	Salesforce Standard Schedules	RevenueCloud Custom Schedules
Lightning Ready	Yes	Yes
Supports entry of actual quantity, actual revenue	No	Yes
Supports custom fields	Yes	Yes
Schedules actually split between multiple users in API	No	Yes

Why use RevenueCloud Custom Schedules?

The RevenueCloud Custom Schedules feature enables you to create product schedules that are not evenly distributed (as can be automatically generated by the RevenueCloud Auto-Schedule feature), while also populating additional fields such as actual revenue, actual quantity and your own custom fields.

Steps to enable Custom Schedules in RevenueCloud

1. Enable Salesforce Product Schedules for your org and for Products.

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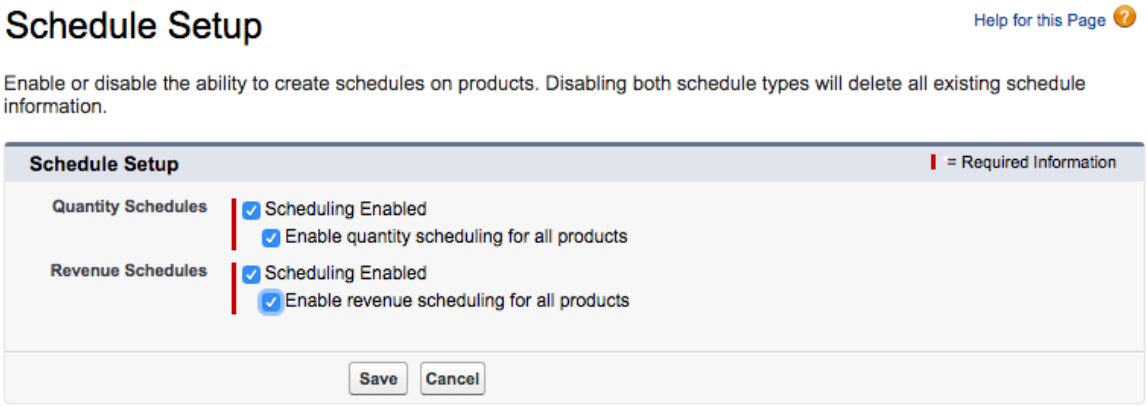
2. Enable the Custom Schedules feature in the RevenueCloud Setup custom setting.
3. Add the Custom Schedules Interface to the Opportunity Product page layout.

Enable Product Schedules for your Salesforce org

Custom Schedules extend Salesforce Product Schedules, so Salesforce Product Schedules must be enabled.

Navigate to Setup->Customize->Products-Product Schedules in Salesforce Setup. Select your choices according to your needs for schedules. If you only want to use revenue Schedules, then only select the two boxes for revenue and click “Save”.



To avoid needless confusion, it is advantageous to properly understand what the Salesforce Schedule Setup interface is controlling in your org.

The two boxes that say “Scheduling Enabled” control whether scheduling of that type (quantity or revenue) is enabled for your entire org. The two boxes that say “Enable [schedule type] for all products” are enabling the quantity and revenue scheduling fields on all products that exist in your org at that moment. So if you create new products after checking the box, they will not be enabled for scheduling.

Tip: *After you enable Product Scheduling in your org, the Enable Scheduling fields on the Product object (Product2) will be invisible to all profiles including Salesforce Administrator. To avoid confusion, adjust the visibility on the standard Salesforce Schedules Enabled fields on Product2 object!*

Adjust the visibility of Schedules Enabled fields on Product object

After you enable Product Scheduling in your org, the fields on the Product object (Product2) will be invisible to all profiles including Salesforce Administrator. This will make it exceedingly difficult to keep track of which products are enabled for scheduling and which type of schedules are enabled. To adjust this, navigate to Product (Product2) fields in Salesforce Setup. Select Revenue Scheduling

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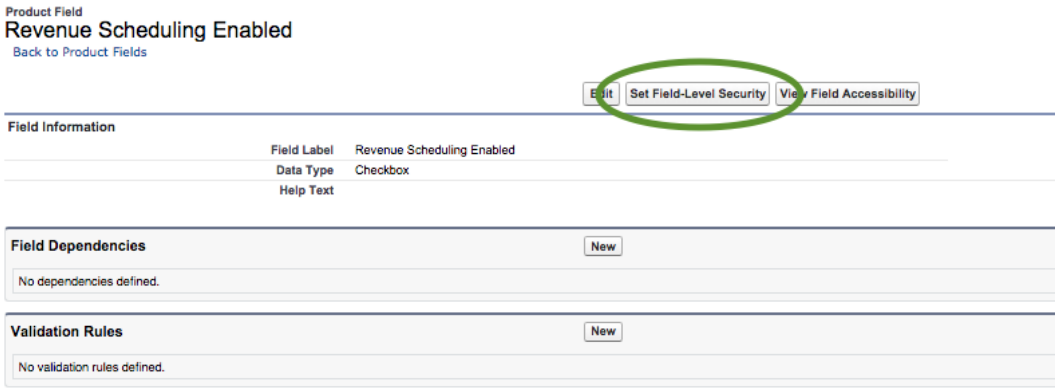
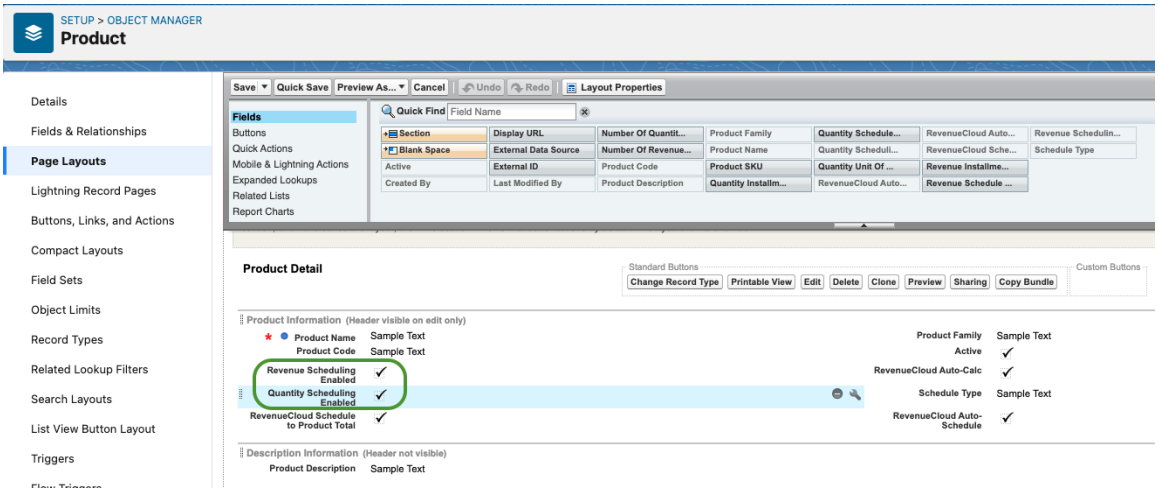
Enabled or Quantity Scheduling Enabled and update the visibility to visible for System Administrator (at a bare minimum) and additional profiles as desired.



Add Schedules Enabled fields to Product page layout

After you've enable Product Scheduling in your org and set the visibility for the Schedules Enabled fields on the Product object, drag one or both of the fields to your Product page layout so they can be set according to your needs.



After setting field visibility on the Scheduling Enabled fields and adding them to the Product page layout you'll be able to easily manage the scheduling settings for products.

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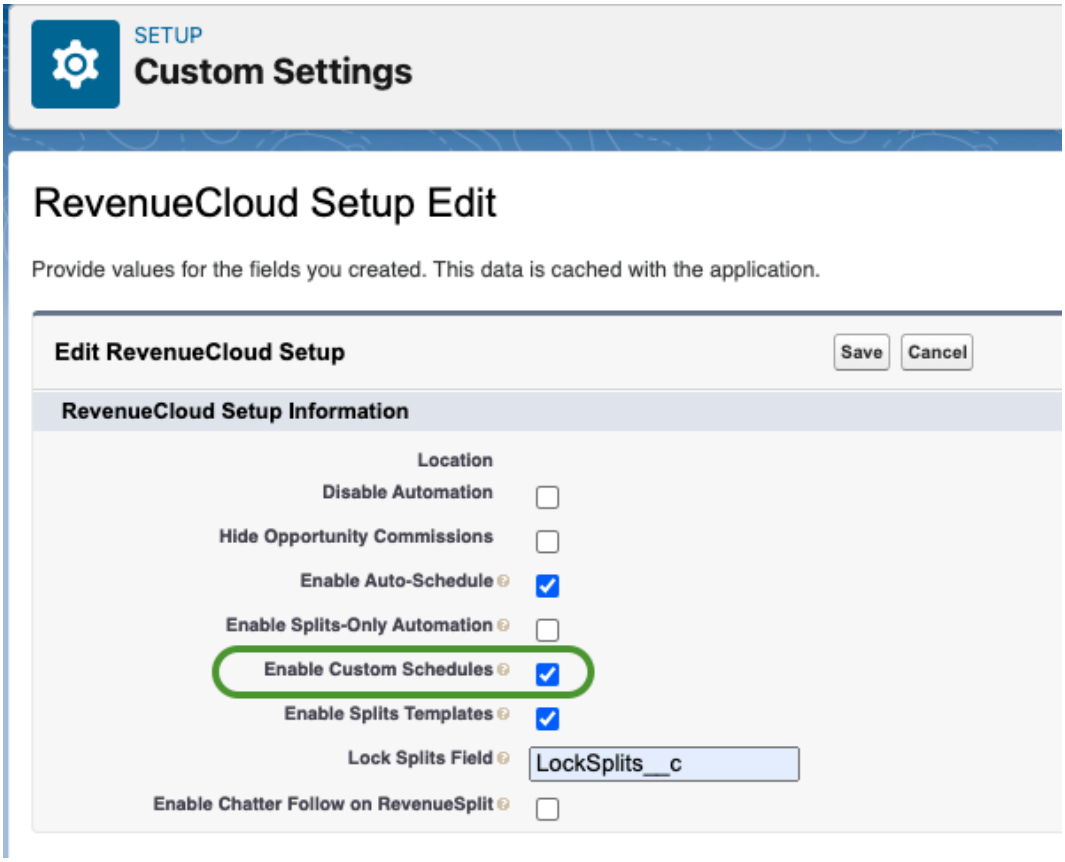
Enable Custom Schedules in the RevenueCloud Setup custom setting
Navigate to “Custom Settings” in Salesforce Setup. Locate the “RevenueCloud Setup” Custom Setting and click “Manage”. Create a new Default Organization level setting or edit the existing one if already created.



Add Custom Schedules to the Opportunity Product page layout
Navigate to your Opportunity Product page layout in setup and click “Edit”. Create a new section; name it “RevenueCloud Custom Schedules”, select “1-Column” and click “Save”.

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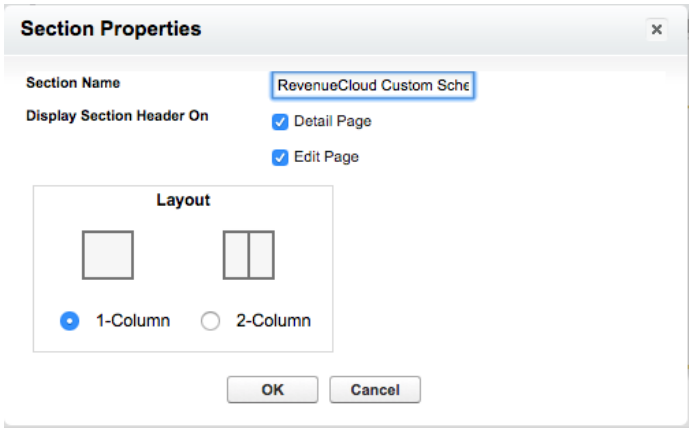
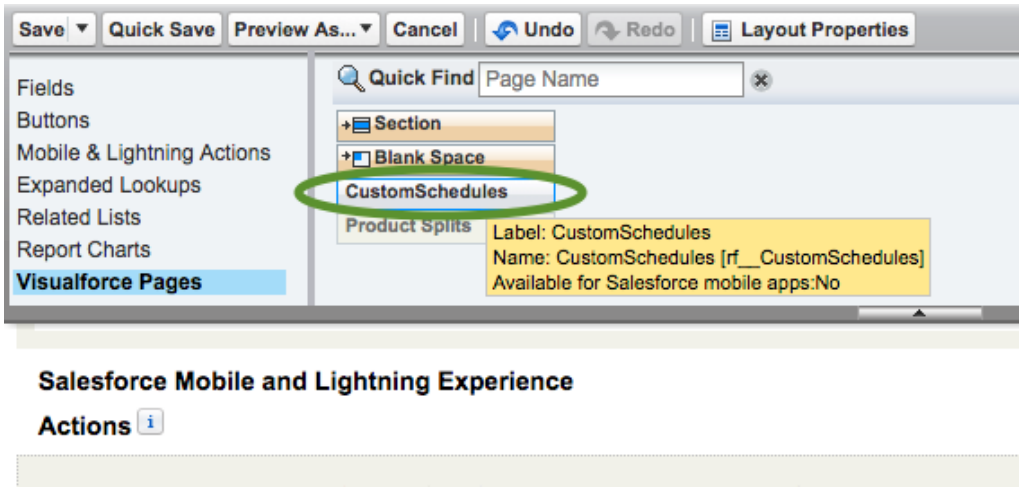
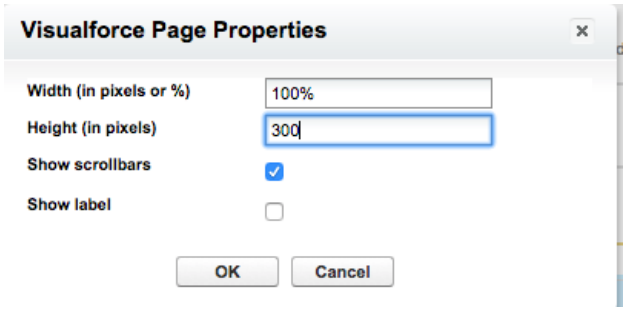


Select “Visualforce Pages” and drag the Custom Schedules page to your new section.



Click on the little wrench in the upper right corner of the Custom Schedules page in your new section to edit the page properties.
Set the properties as shown below to Width: 100%, Height: 300, Show Scrollbars: true.



If you expect to edit larger schedule terms such as 12 – 36 months, you may want to make the Height larger to make the interface taller. You can always come back to this to adjust as you become more familiar with your schedule management needs.

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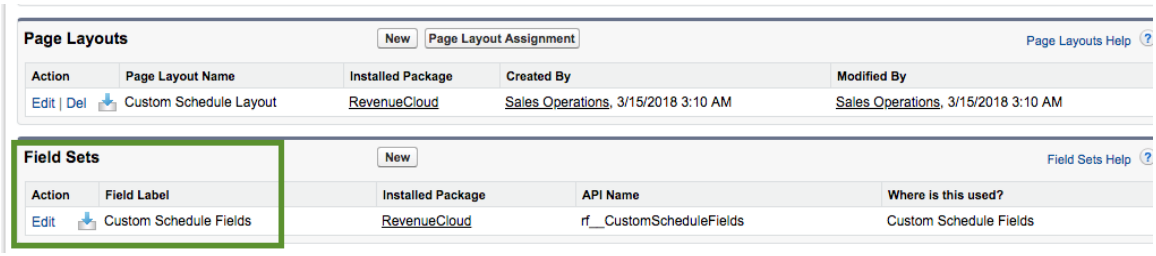
After saving the Opportunity Product page layout, you will have access to the RevenueCloud Custom Schedules interface in Salesforce Lightning and Classic.

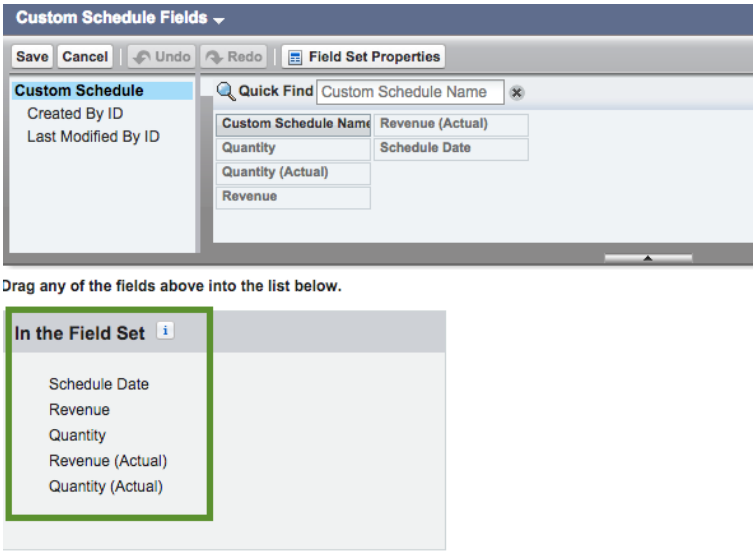
Customize the Custom Schedules Interface via field set.

Salesforce field sets must be edited by Salesforce Administrators in Salesforce Classic Edition.

In Salesforce Classic setup, Navigate to Create->Objects->Custom Schedule. Locate the “Custom Schedules Fields” field set and click “Edit”.



The fields “In the Field Set” are the ones that will be in the interface. The vertical order of the fields is the horizontal order (left to right) for the interface.
If you create your own new custom fields on Custom Schedule, they will appear in the upper section and you can drag them into the “In the Field Set” section to include them in the interface.



Create Custom Fields for Custom Schedules

Tip: *The RCLIS object has a lookup field to Custom Schedule that is populated for each instance where a Custom Schedule exists. Remember to create new custom fields on RCLIS to reflect the split or constant values of your new custom*

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fields on Custom Schedule and then add them to your Custom "My Revenue" report type for use in reporting.

RevenueCloud Custom Schedules enables you to add your own custom fields to Salesforce Product Schedules. Your custom fields will be reportable in RevenueCloud reporting for all Opportunity Product records where Custom Schedules have been saved and custom fields have been populated.

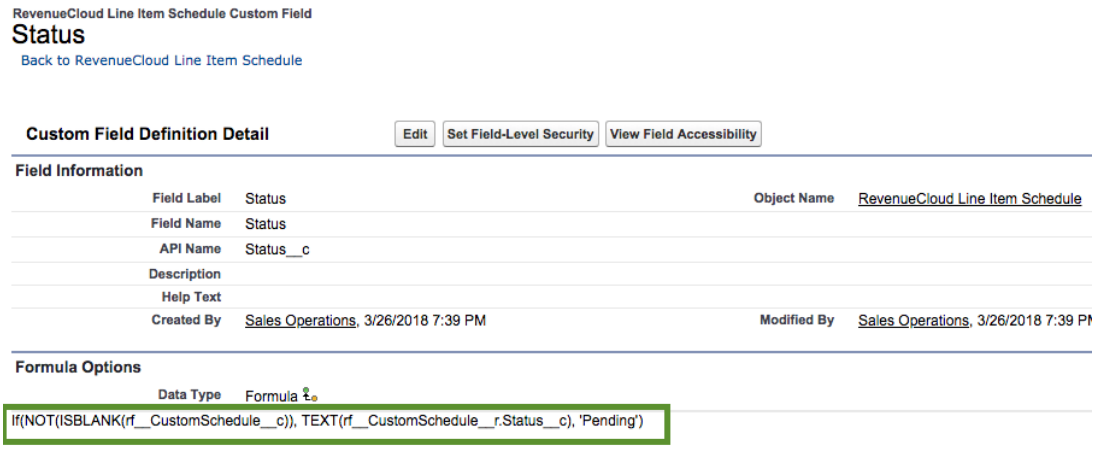
1. Navigate to the Custom Schedule object and create an editable custom field such as Currency, Number, Percent, Picklist, Text etc.
2. Add the field to the Custom Schedules field set.
3. Navigate to the RevenueCloud Line Item Schedule (RCLIS) object and create a formula field to reflect the value set by your schedule.
    a. If your custom field is a constant that should apply across all splits, such as a text value, picklist, etc, then your formula can just reflect the value for all related RCLIS via the lookup field to Custom Schedule from RCLIS.
    b. Conversely, if your field is a number or currency value which should be split between Reps according to their split percentage or overlay percentage, then construct your formula on RCLIS using the Percentage or Overlay Percentage fields to split your value.

Custom Field Example – Status Picklist

In this example, we create a picklist on Custom Schedule called Status__c.

The picklist has the choices: 'Pending',' Actualized'. The field is added to the Custom Schedules field set for display and editing in the interface.

Next, we create a formula field of type Text on RCLIS and name the field Status__c. The field displays our formula default value 'Pending' when the lookup field to Custom Schedule is null, and when the lookup to Custom Schedule is not null, we display the value that has been set for the field.



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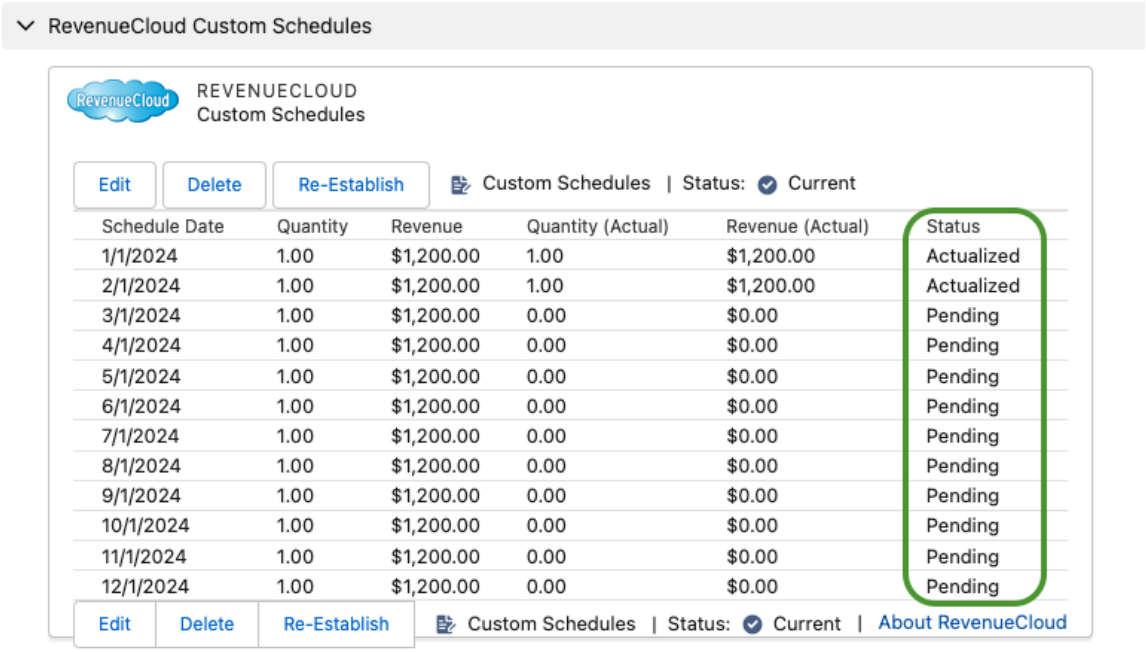
Now we can edit our custom field in the Custom Schedules interface and add the new RCLIS field to our Custom “My Revenue” report type for use in reporting.



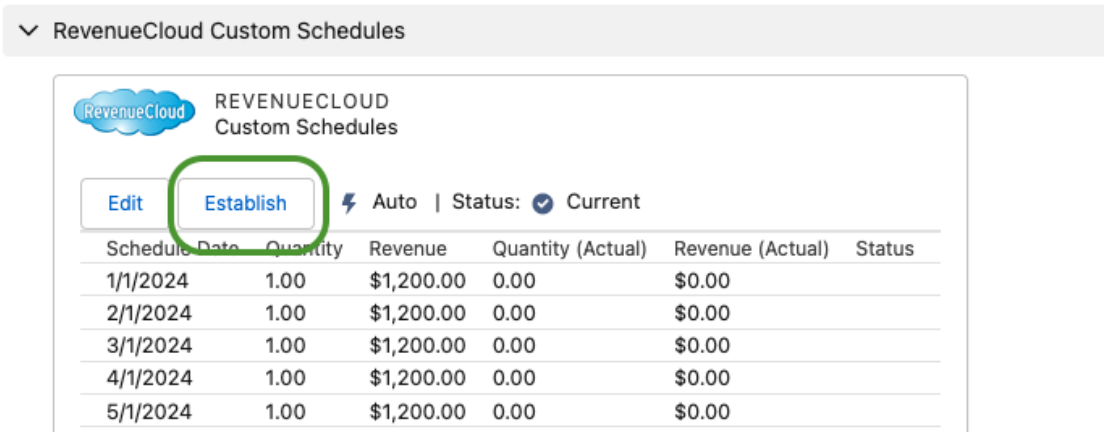
Quick Start – RevenueCloud Custom Schedules

To begin using Custom Schedules, you can either establish a new schedule by clicking “Establish”, or you can click “Edit” and add / remove rows as desired.

When Custom Schedules have not been generated, the interface will display type “Auto”. If Auto-Schedule are enabled for the Product, they will be displayed in the interface (screen shot below). If not, then the interface will display a single schedule entry representing the one-time value of the Opportunity Product.

Establish Custom Schedules

To establish schedules, click the “Establish” button.



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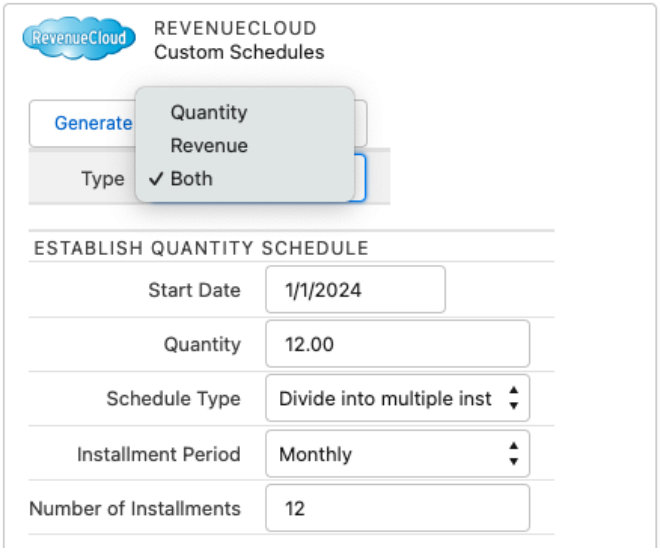
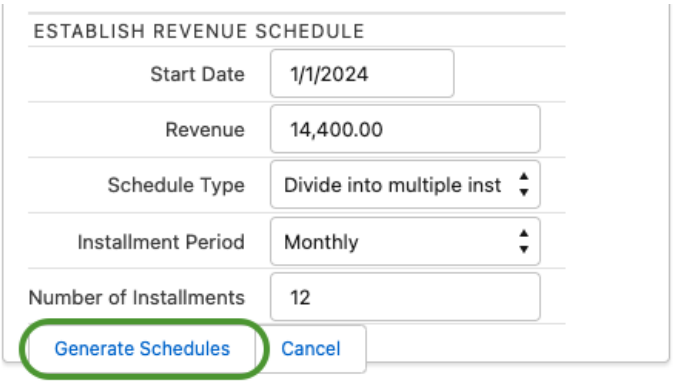
Select Schedule Type

There are three types of Schedules you can create: Quantity, Revenue and Both. The types available in the interface are driven by the schedule types enabled for the particular Product2 record referenced by your Opportunity Product. If you only want to use revenue schedules, you should only have “Revenue Schedules Enabled” on your Product2 records and then the Type will be pre-set to “Revenue” every time you establish schedules.



Set the Start Date, Quantity, Revenue, Schedule Type, Installment Period, and Number of Installments as desired and click “Generate Schedules”.



After you click “Generate Schedules”, the interface will refresh to display your new Custom Schedules. Now you can edit them, add rows, delete rows, and modify Actual Quantity, Actual Revenue or your custom fields. Salesforce Product Schedules will be synced behind the scenes according to your Quantity and Revenue entries and the Opportunity Product Quantity, Sales Price and Total Price fields will be controlled by Salesforce standard functionality. So the Opportunity Product values will be continuously synced to your Custom Schedules as you make changes (refresh your page to see the changes to the Opportunity Product standard fields). All of the values will be accessible in

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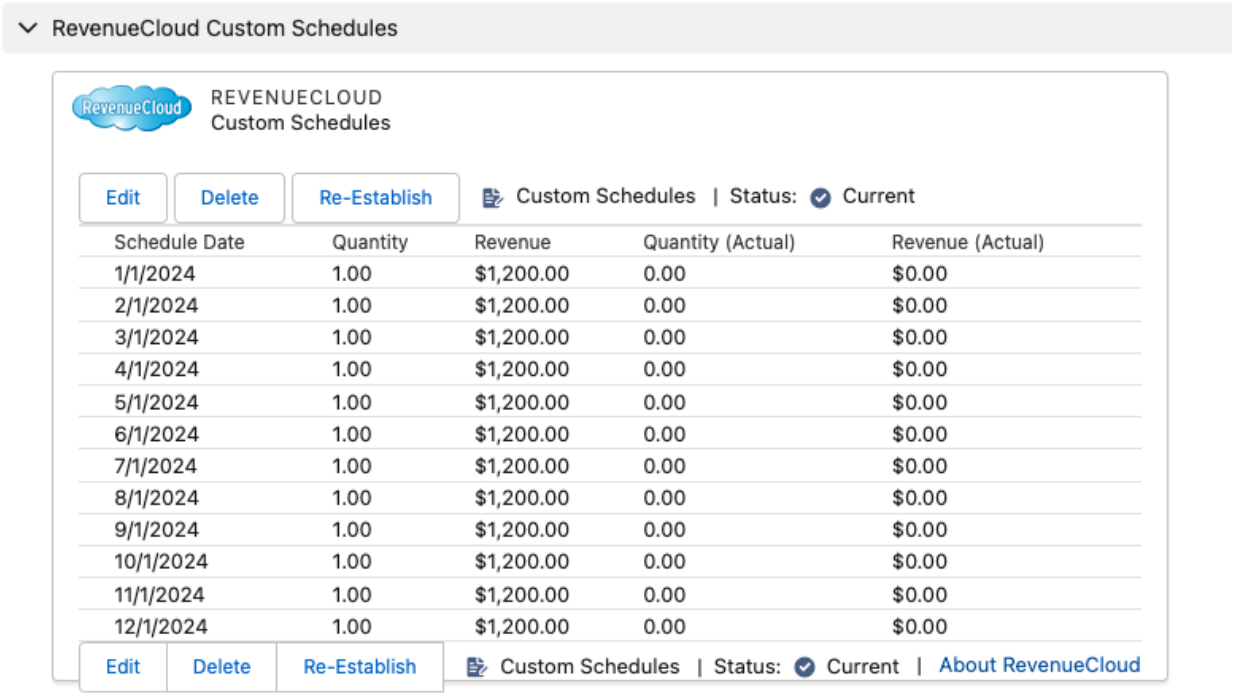
RevenueCloud Reporting (remember to add any new custom fields you've created on RCLIS or RC Product to your Customizable "My Revenue" report type).



Override Auto-Schedule with Custom Schedules

When RevenueCloud Auto-Schedule is enabled for an Opportunity Product and you have not established or saved Custom Schedules manually, the Auto-Schedule entries will be presented in the Custom Schedules Interface as type "Auto".

You can click "Edit" in the Custom Schedules interface to override the automatic Auto-Schedule Schedules values with your entries. Your manual entries will now control the Quantity, Sales Price and Total Price of the Opportunity Product accordingly (as is always the case with Salesforce Product Schedules).

In the screen shot below, the Custom Schedules interface is displaying the values of a three month schedule automatically generated by the Auto-Schedule feature according to Opportunity Product date, end date, quantity and total price. Note the schedules are displayed as type "Auto". This can serve as a starting point for Custom Schedules that you want to modify add rows and additional field values.

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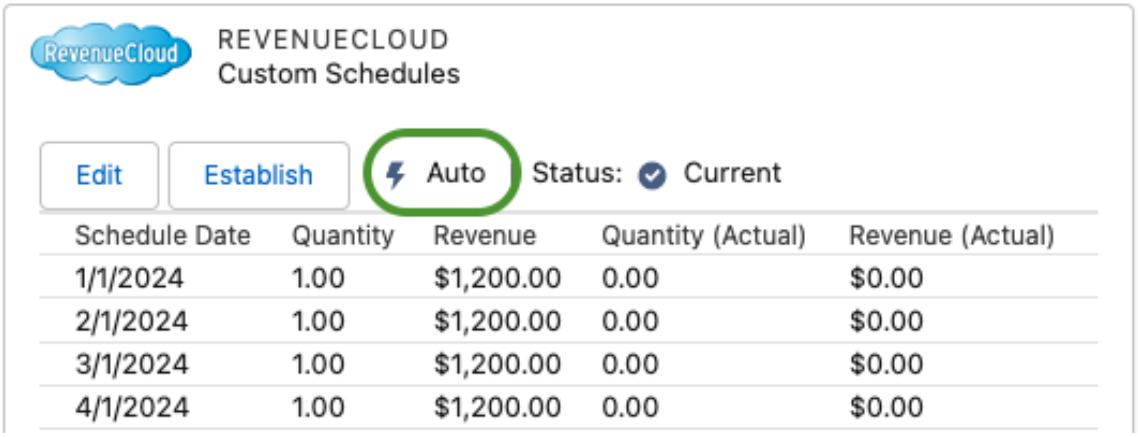
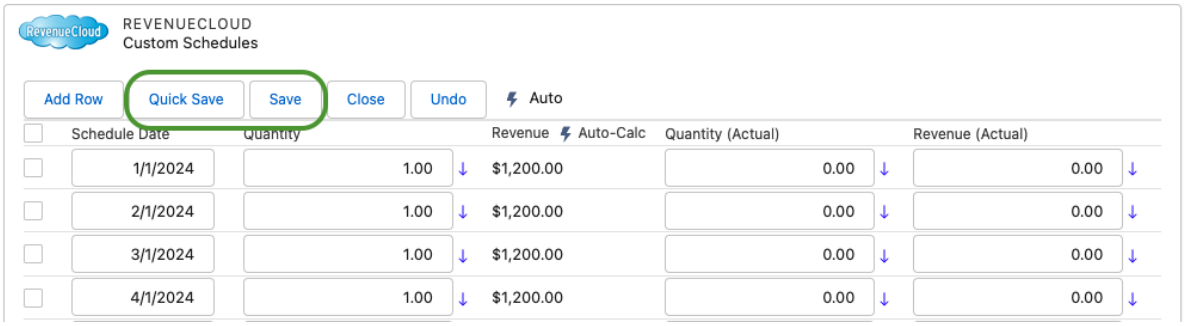
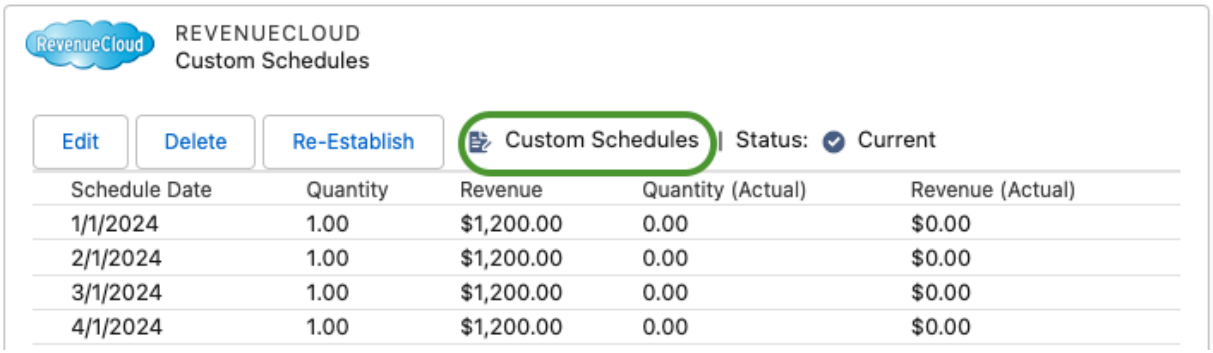


When you edit and save, you will be creating Custom Schedules for this product which will control the Quantity, Sales Price and Total Price of the Opportunity Product.



After saving your Custom Schedules, the interface with display the type as “Custom Schedules”



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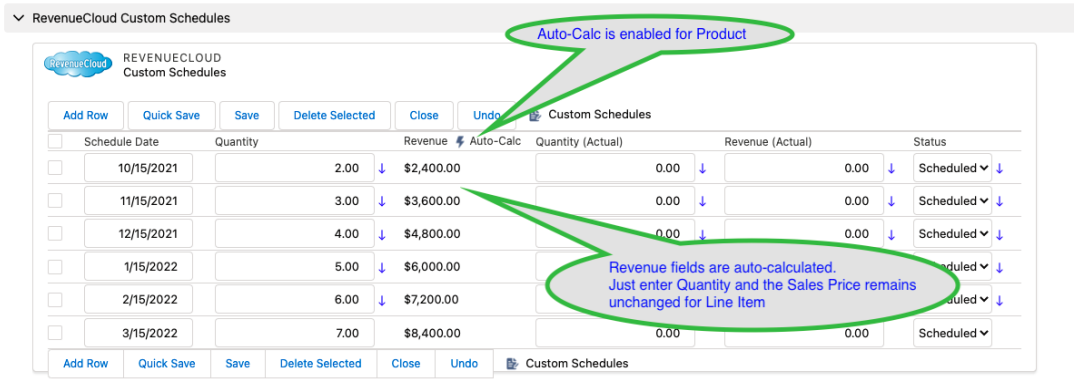
Revenue Auto-Calc – Enter Quantity, Calculate Revenue

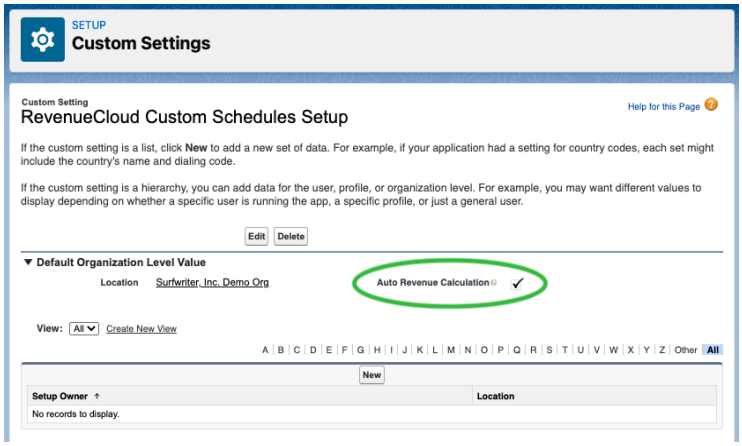
When working with Salesforce Quantity and Revenue Schedules, you may want to just enter Quantity and have the Revenue amount calculated for you automatically without having the Sales price change. The RevenueCloud Auto Revenue Calculation Feature (Revenue Auto-Calc) enables you to do this.



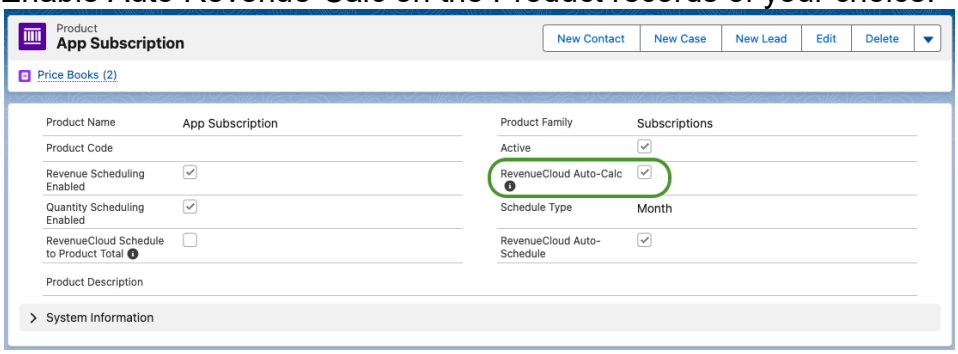
Enable Revenue Auto-Calc for Custom Schedules

To enable and use Auto Revenue-Calc:

1. Create an entry in the RevenueCloud Custom Schedules Custom Setting and check “Auto Revenue Calculation”.



2. Add the Auto Revenue-Calc field to the Product object page layout
3. Enable Auto Revenue-Calc on the Product records of your choice.



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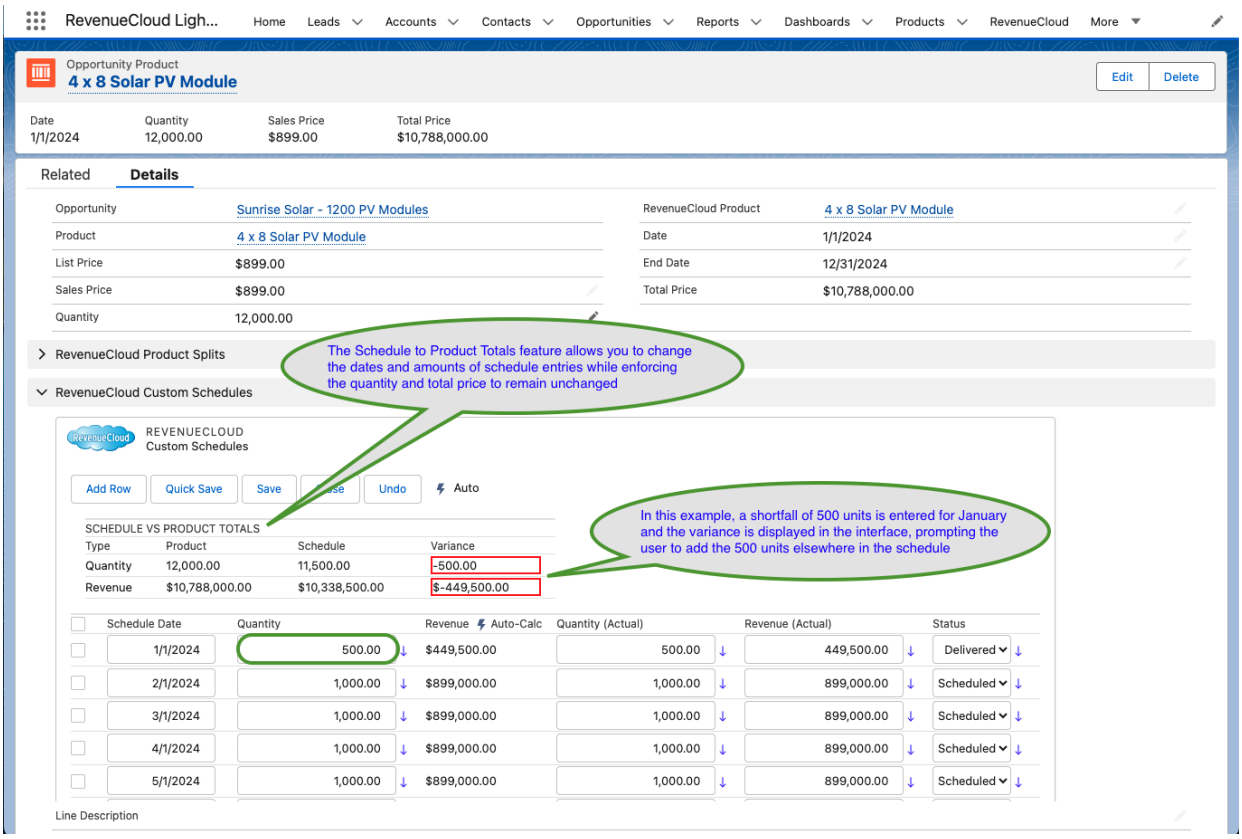
Schedule to Product Total – Prevent product total changes while editing schedules

In some sales processes, such as scheduling delivery of manufactured parts, it is desirable to change quantities and dates of revenue schedules without worrying about changing the total quantity or total price of the Opportunity Product which has already been committed to the customer.

The RevenueCloud Schedule to Product Total feature empowers you to edit your schedules however you like, including changing dates, quantities and currency amounts. You can even add or remove schedule entries. When your un-saved changes would result in a reduction or increase in the total Quantity or Total Price of the Opportunity Product, the variance between the Opportunity Product Amounts and un-saved Schedule amounts is displayed in a table at the top of the RevenueCloud Custom Schedules Interface (screenshot below).

When the variance is not zero, validation will prevent you from saving the schedule.



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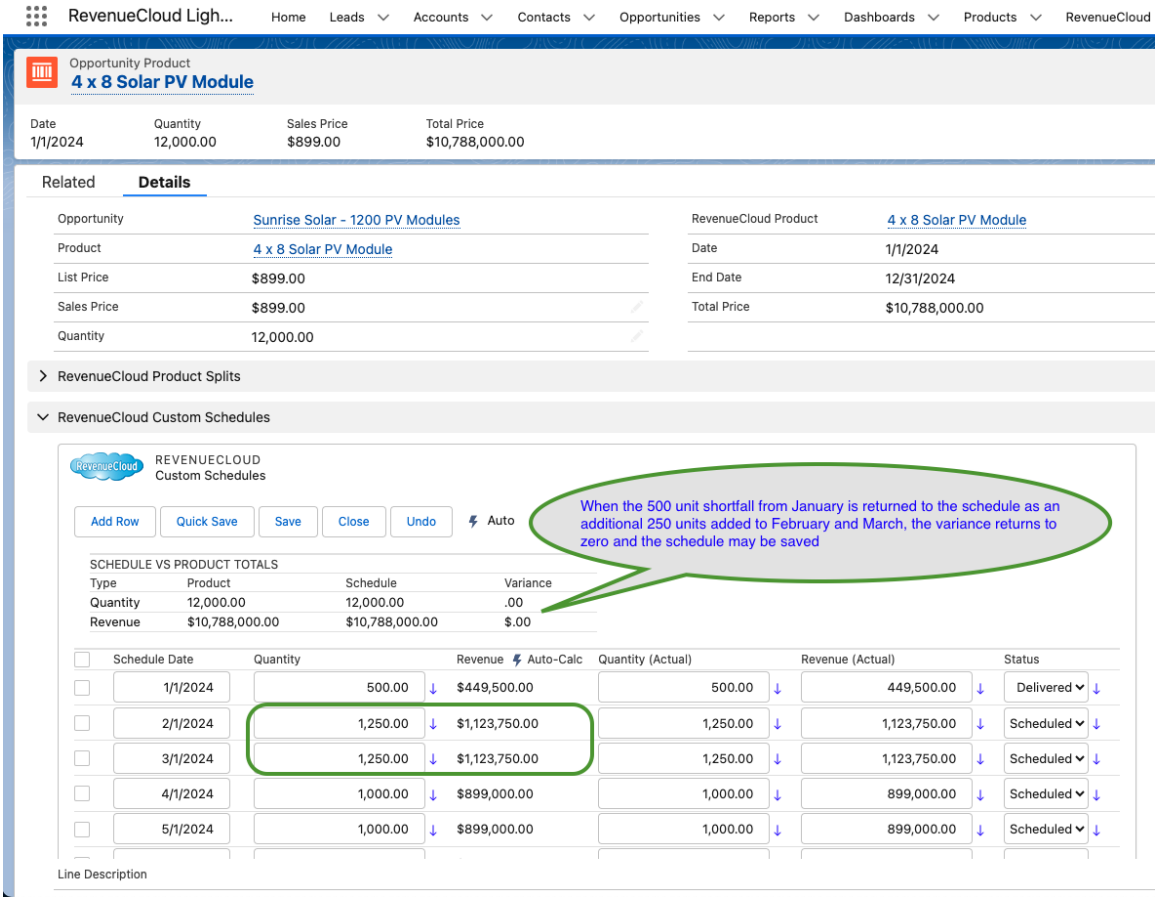
Once you rebalance your schedule to align with the Opportunity Product Amounts, then the variance displayed will return to zero and you will be able to save the schedule with your new changes (screenshot below).



Configuration – Enable Schedule to Product Total

The Schedule to Product Total feature is enabled via the RevenueCloud Setup Custom Setting and via a checkbox field on Products.

Enable Schedule to Product Total in the custom setting

1. Navigate to Setup->Custom Settings->RevenueCloud Custom Schedules Setup
2. Either navigate to your existing Organization Level setting entry or create a new one.
3. Edit the setting entry and set the Schedule to Product Total field to true (screenshot below).

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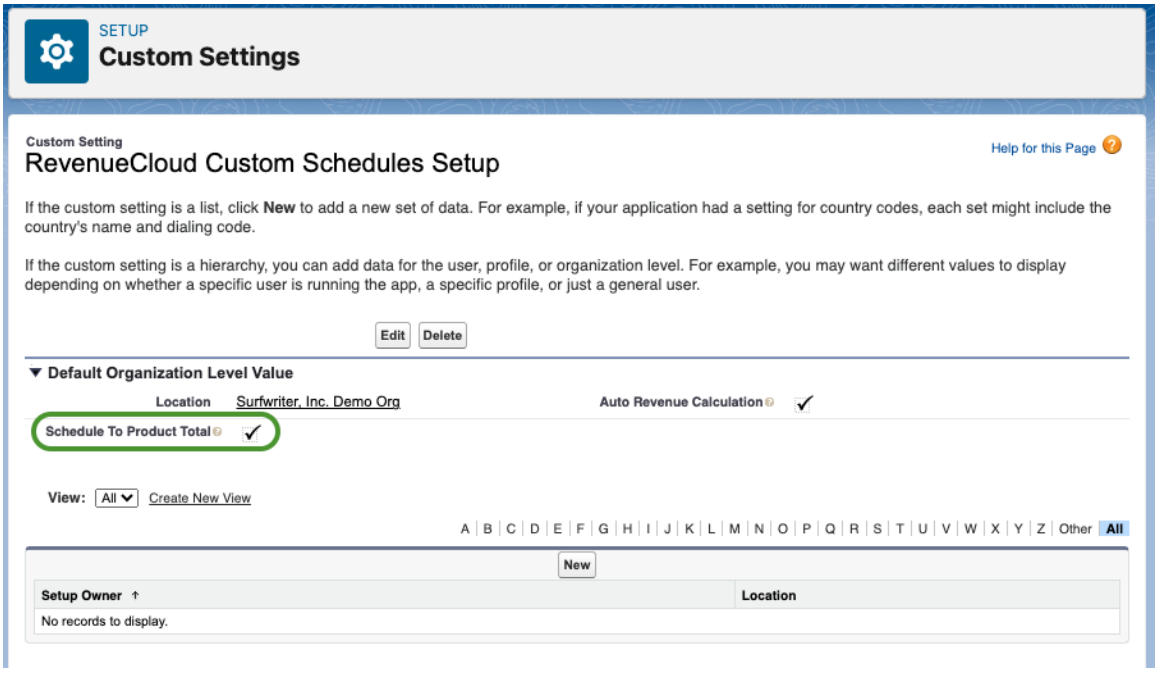
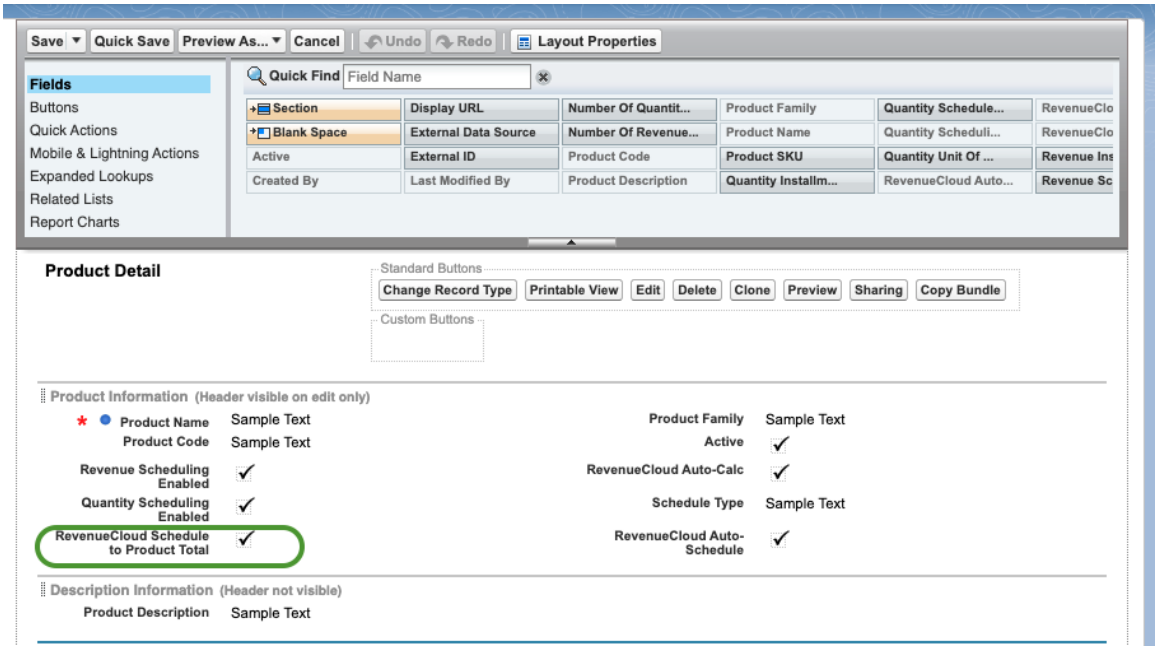


4. Navigate to Setup->Object Manager->Product->Page Layouts
5. Add the Schedule to Product Total checkbox field to the Product Page Layout (screenshot below), Save the layout.



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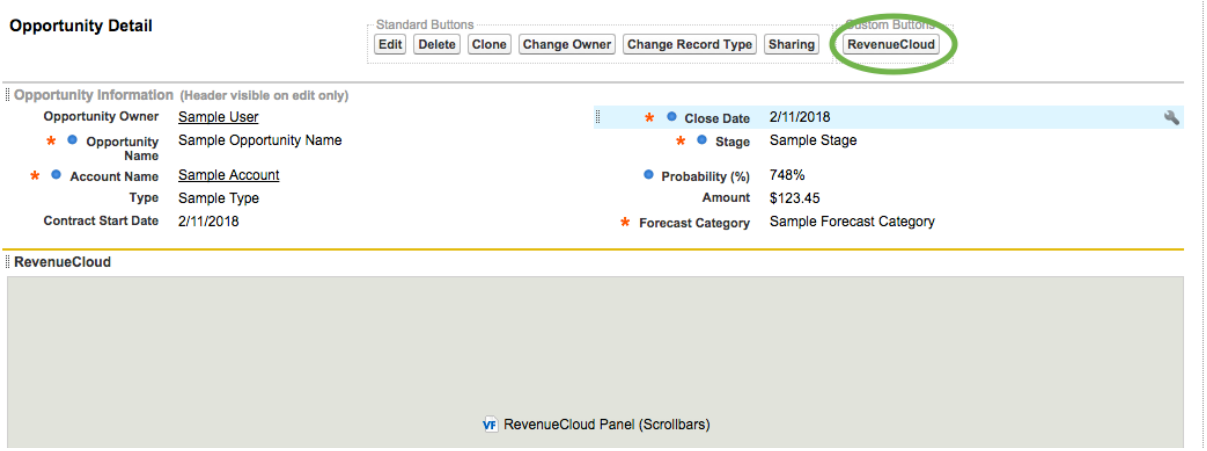
Configuration – RevenueCloud Page

About the RevenueCloud Page

The RevenueCloud Page enables an optional, alternate way of interacting with RevenueCloud Opportunity Splits, via a custom button from the Opportunity page layout. The RevenueCloud Page also supports viewing history of RevenueCloud Splits when Salesforce History Tracking has been enabled for the RevenueCloud Revenue Split object.

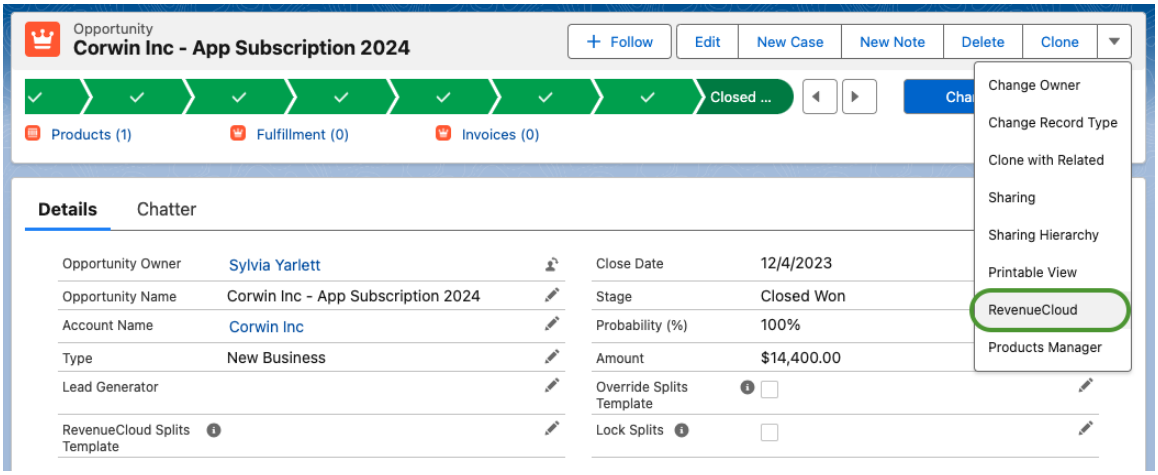
Add RevenueCloud Button to Opportunity page layout



Quick Start – RevenueCloud Page

Navigate to the RevenueCloud Page from Opportunity

Select “RevenueCloud” from the actions pull-down menu in Lightning or in Salesforce Classic, click the RevenueCloud custom button on the page layout.



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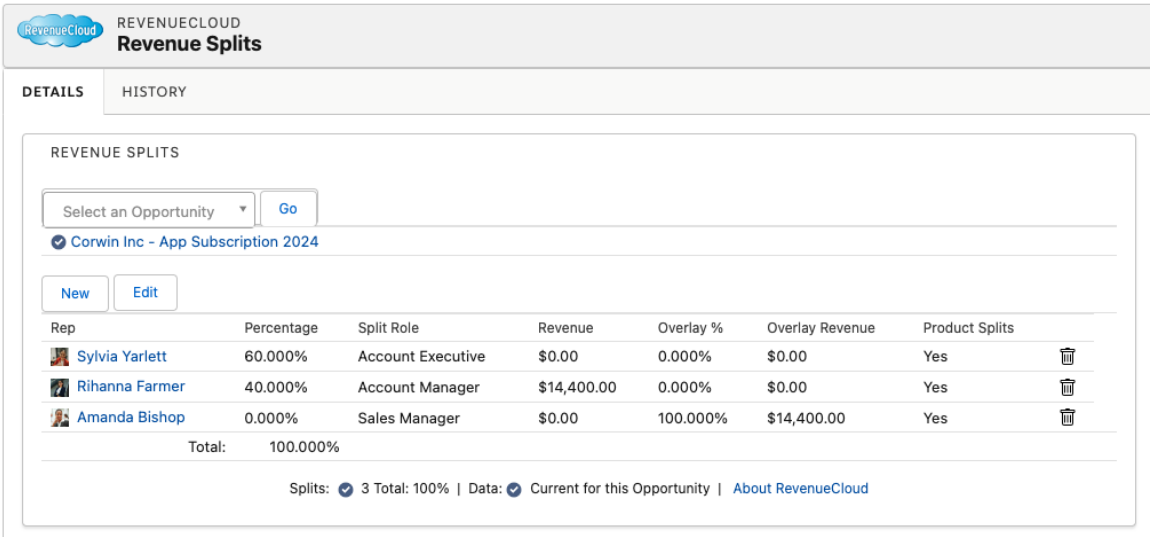
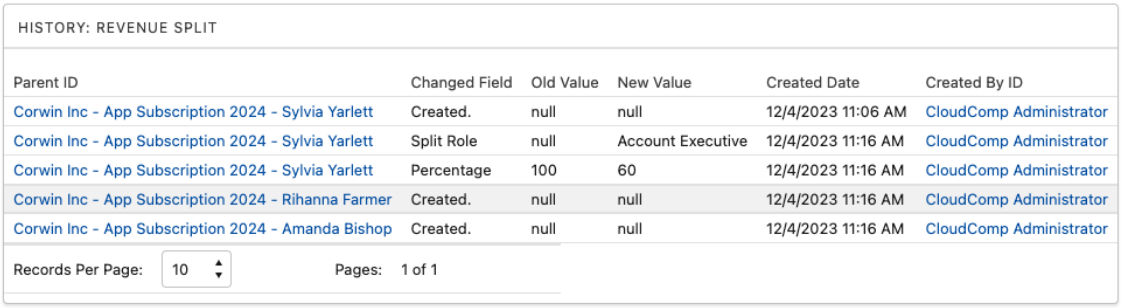
Viewing Opportunity Splits on the RevenueCloud Page

When you navigate to the RevenueCloud Page from the Action, the page will be opened within the context of the Opportunity you're working on.



Viewing Splits History on the RevenueCloud Page

Select the "History" tab on the RevenueCloud Page (History Tracking must be enabled for the Revenue Split object and fields).



RevenueCloud Splits Templates

RevenueCloud Splits Templates enables you to create Templates for sets of Opportunity splits so you can use them without having to create the sets of splits each time. With RevenueCloud Splits Templates you can configure splits for any number of scenarios such as account teams, territories, advertising regions and more.

Splits Templates – Create Splits for Reps as Users or Paths

Sales Reps can be referenced directly in Splits Templates just like in RevenueCloud Splits. But Sales Reps can also be referenced by paths, such as opportunity owner, account owner, custom lookup fields to User etc. When you

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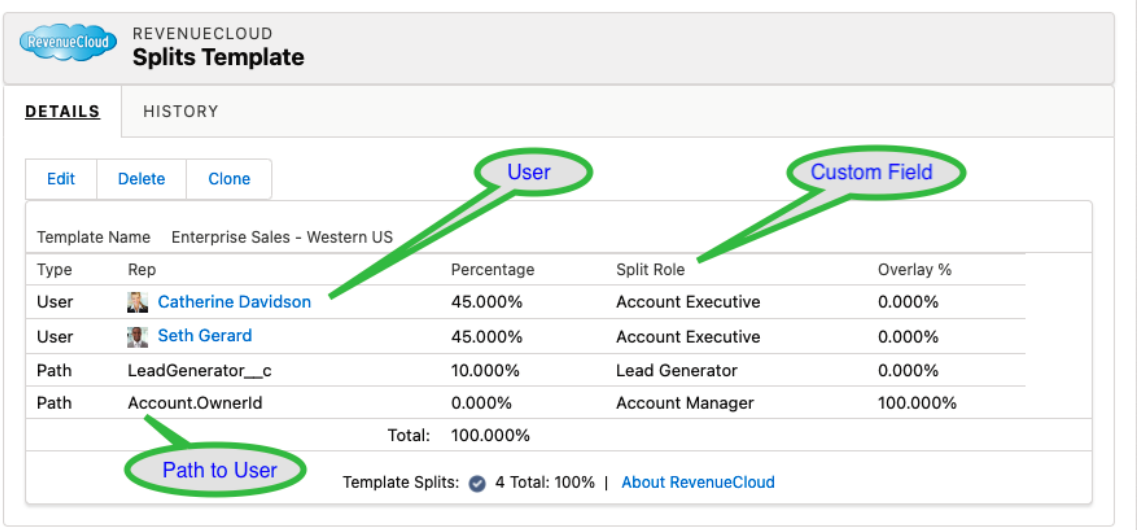
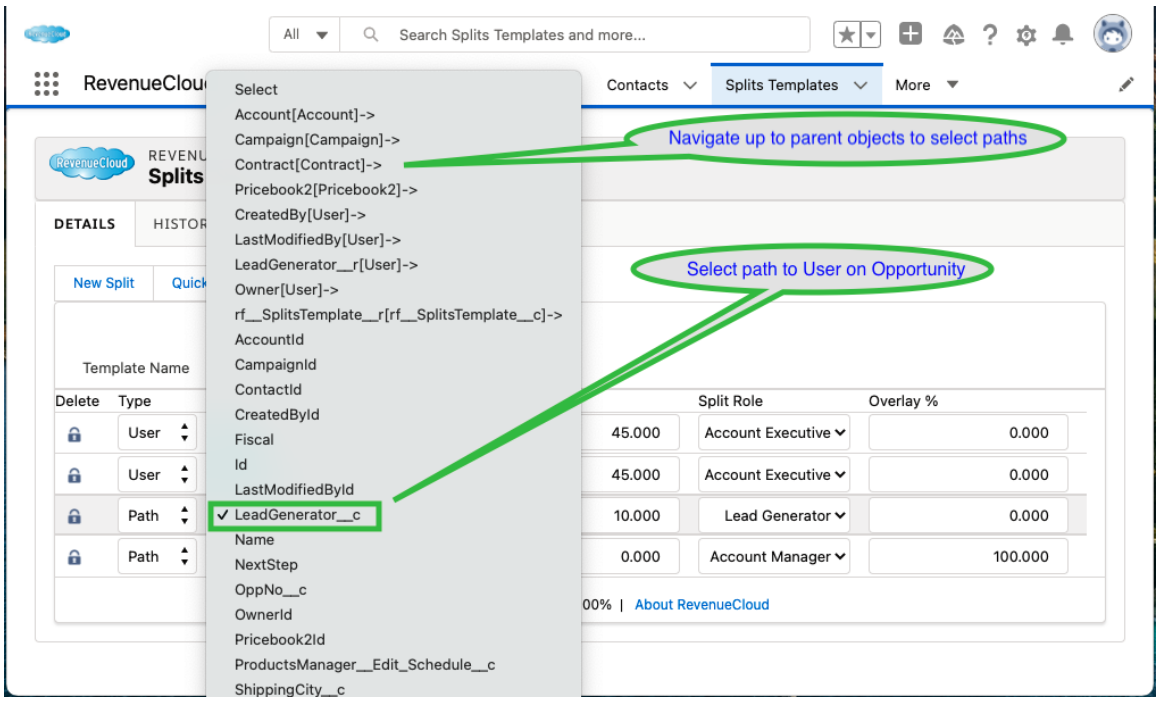
configure a Splits Template using paths, then the Users who are in those particular paths on the given Opportunity when the Splits Template is activated will be referenced by the Splits.





Splits Templates – Enter Splits Template in Opportunity

To use your Splits Template, just enter it in the Splits Template field on Opportunity.

Splits Templates – Override Splits Template in Opportunity

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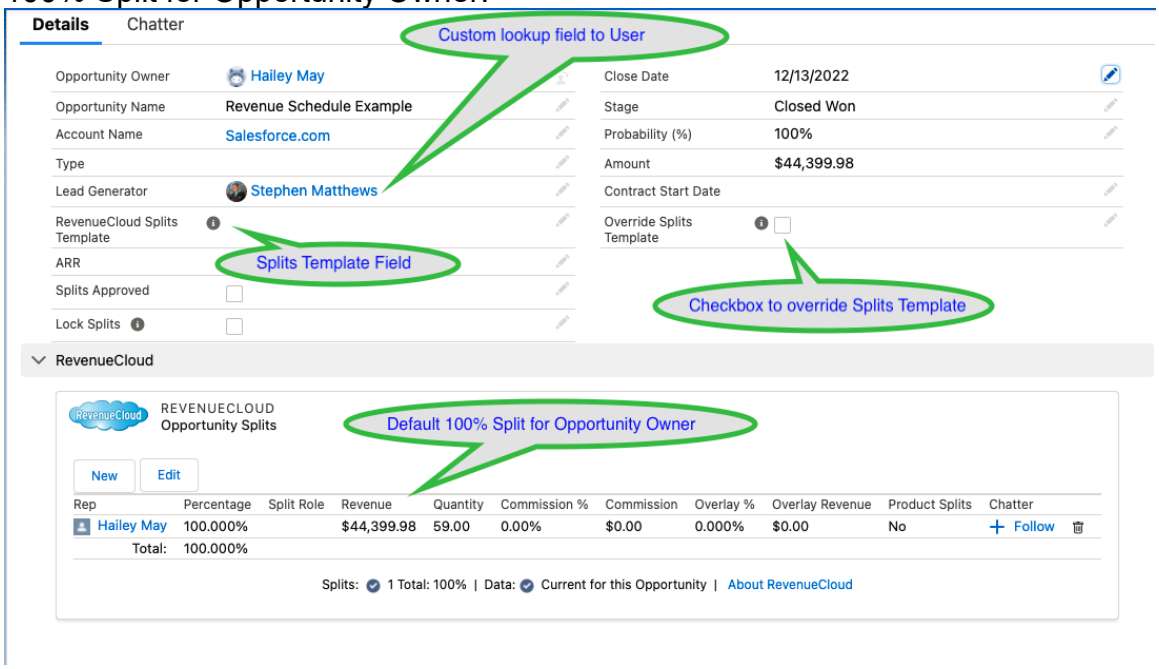
To make changes for the particular Opportunity after inserting the Splits Template, Check the Override Splits Template Checkbox.

Screenshot: Opportunity before entering the Splits Template. Note the default 100% Split for Opportunity Owner.



Screenshot: The same Opportunity after entering the Splits Template. In this example, the Opportunity owner was not included in the Template Splits, so there is no longer a Split for the Opportunity owner. Conversely, you can just as easily always have a Split for the Opportunity owner by Path.

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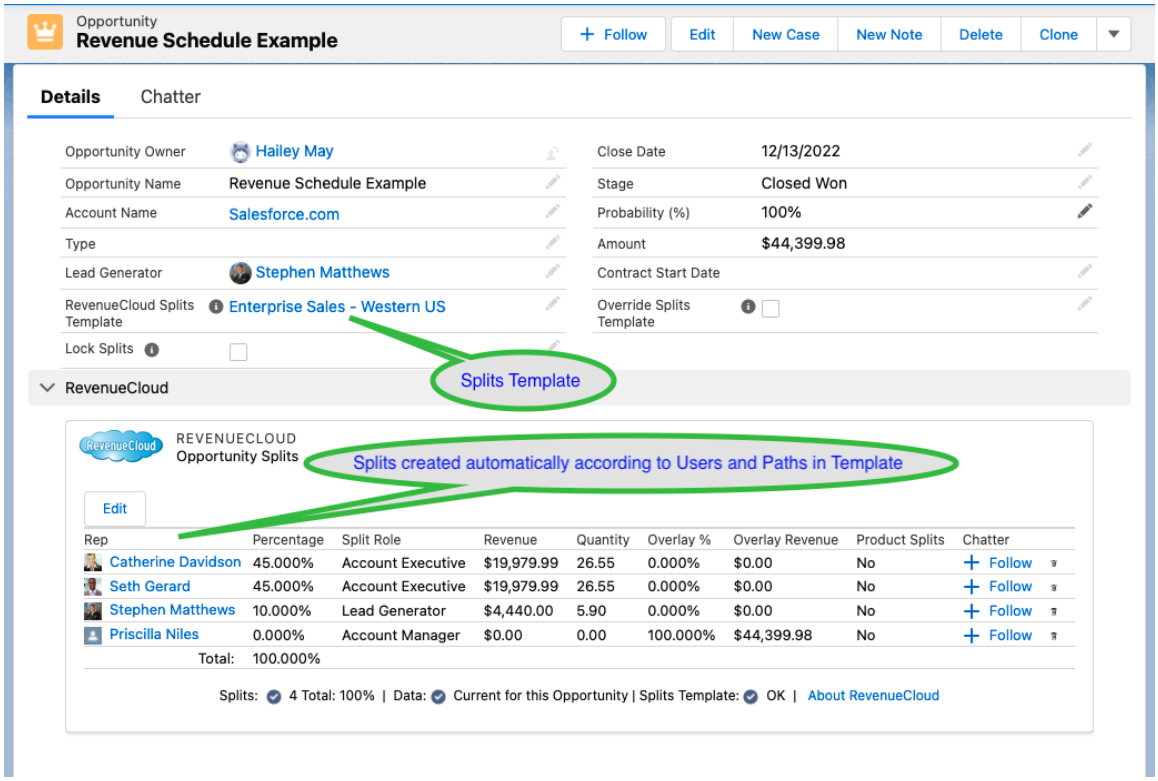

Splits Templates – Configuring Custom Fields

Splits Templates can populate any of the custom fields you've created on the Revenue Split object. To do so, just create custom fields of same type and same API Name on the Template Split Object to match your custom fields on the Revenue Split object. RevenueCloud will sync the values across from the Template Splits to the Revenue Splits when the Template is entered into an Opportunity.

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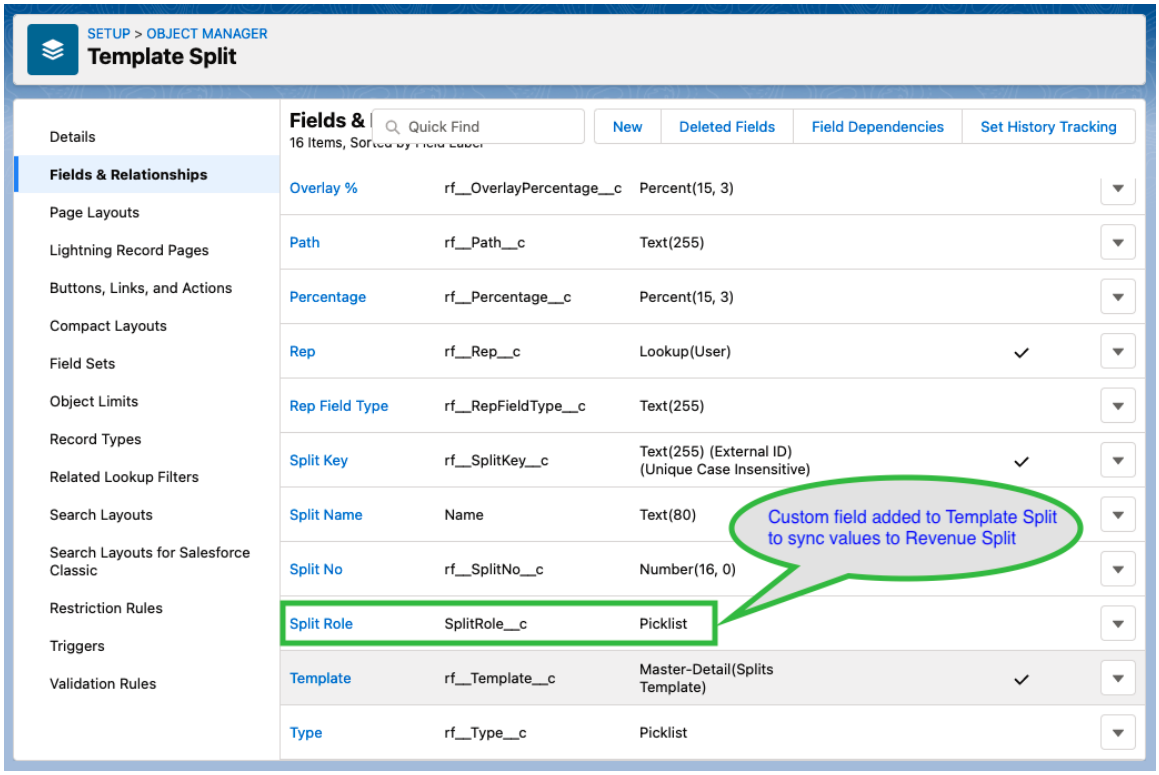
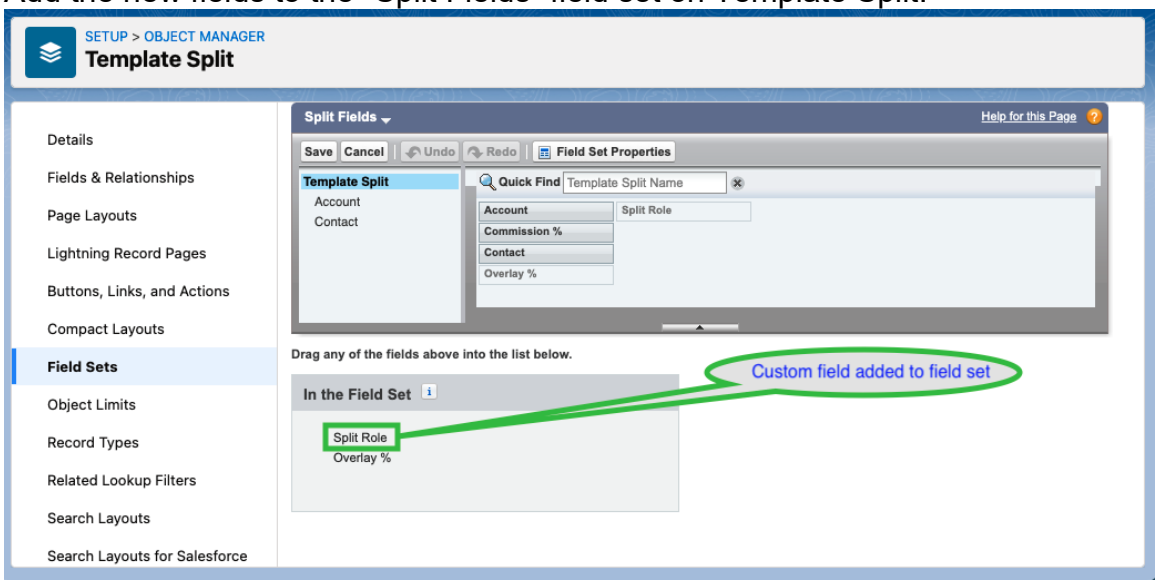


Add the new fields to the “Split Fields” field set on Template Split.



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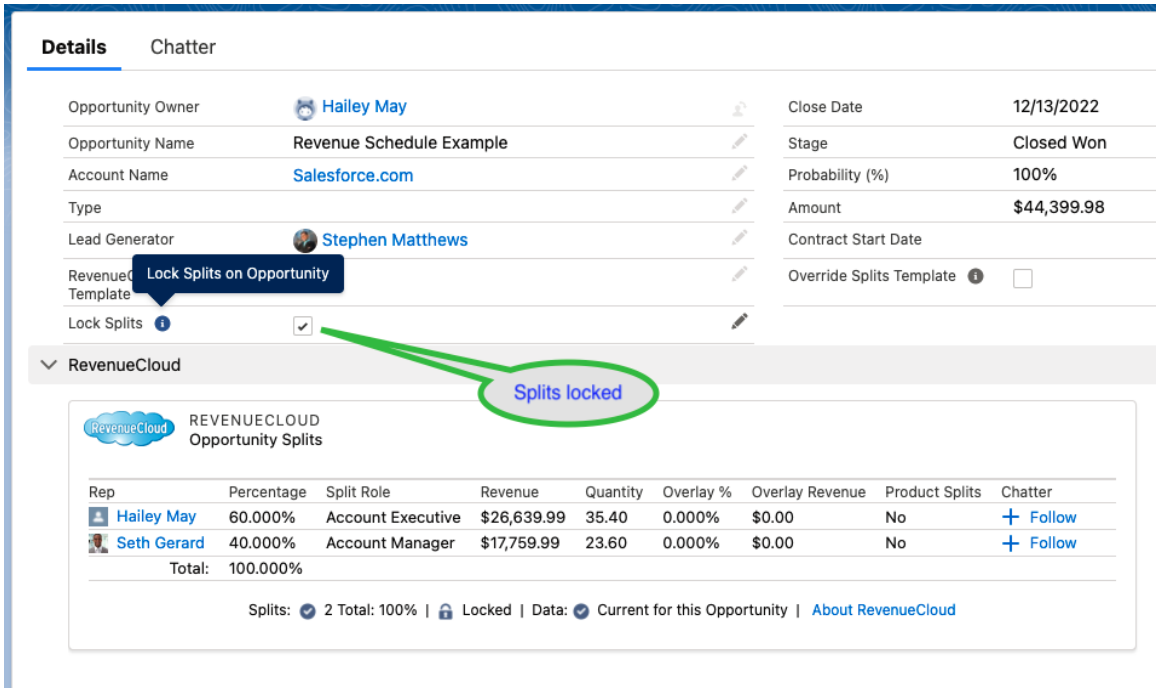
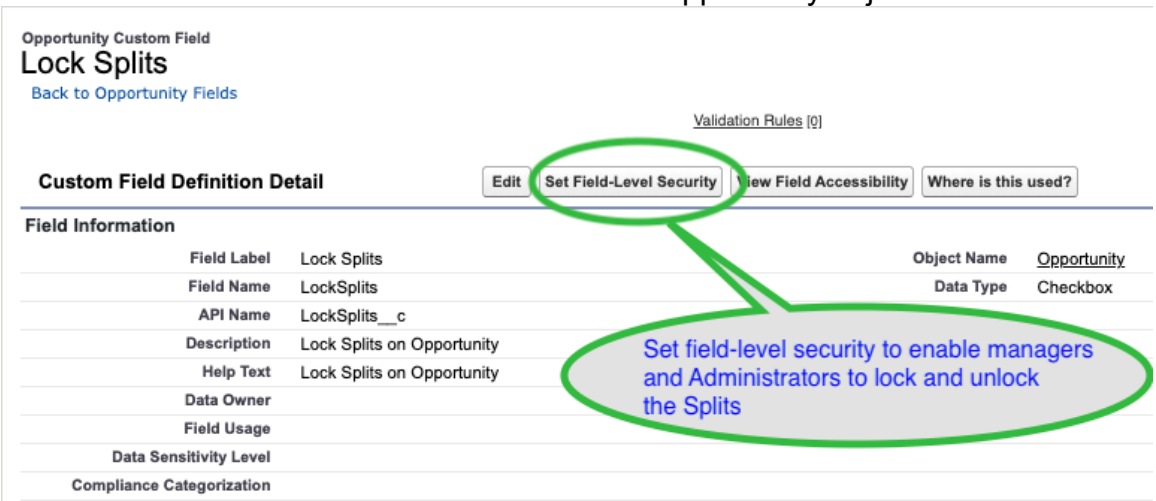
Lock Splits – Enable Locking of RevenueCloud Splits

RevenueCloud Splits can be locked down by Managers or Administrators to enable Sales Reps to work normally with Opportunities while preventing changes to the Splits. The RevenueCloud data will continue to be updated during Opportunity edits, but the Splits will be locked. The Lock Splits checkbox also empowers you to create your own workflow / approval process to allow Reps to request approval / locking / unlocking of Splits by Managers and Administrators.



Lock Splits – Configure Lock Splits Field for Opportunity

1. Create a custom Checkbox field on the Opportunity object.



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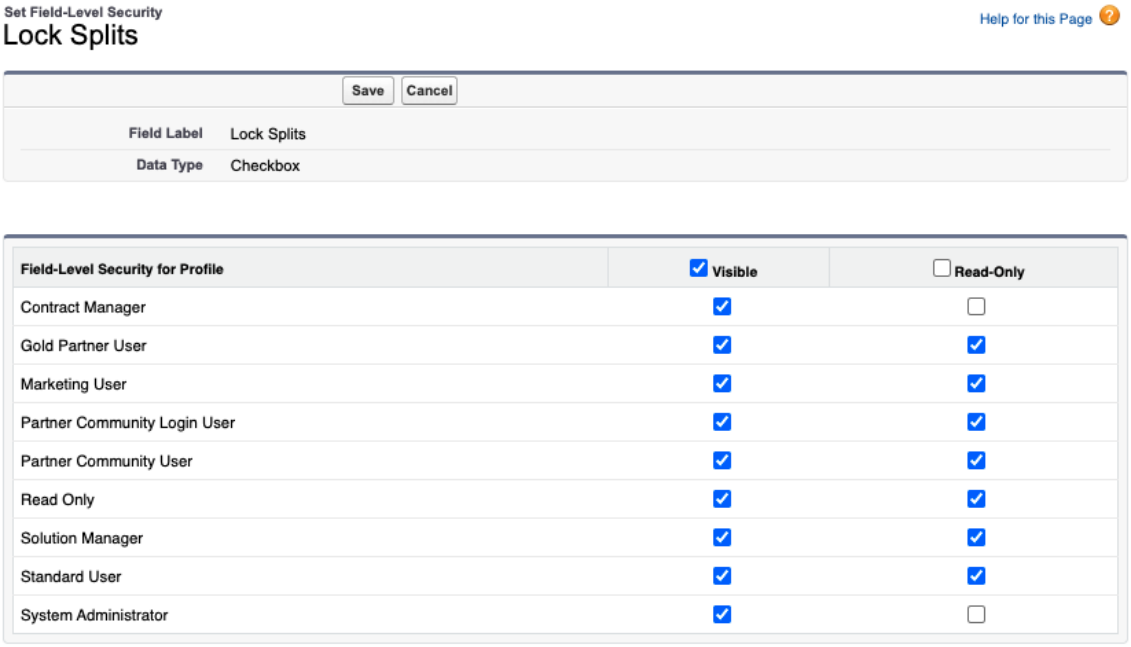
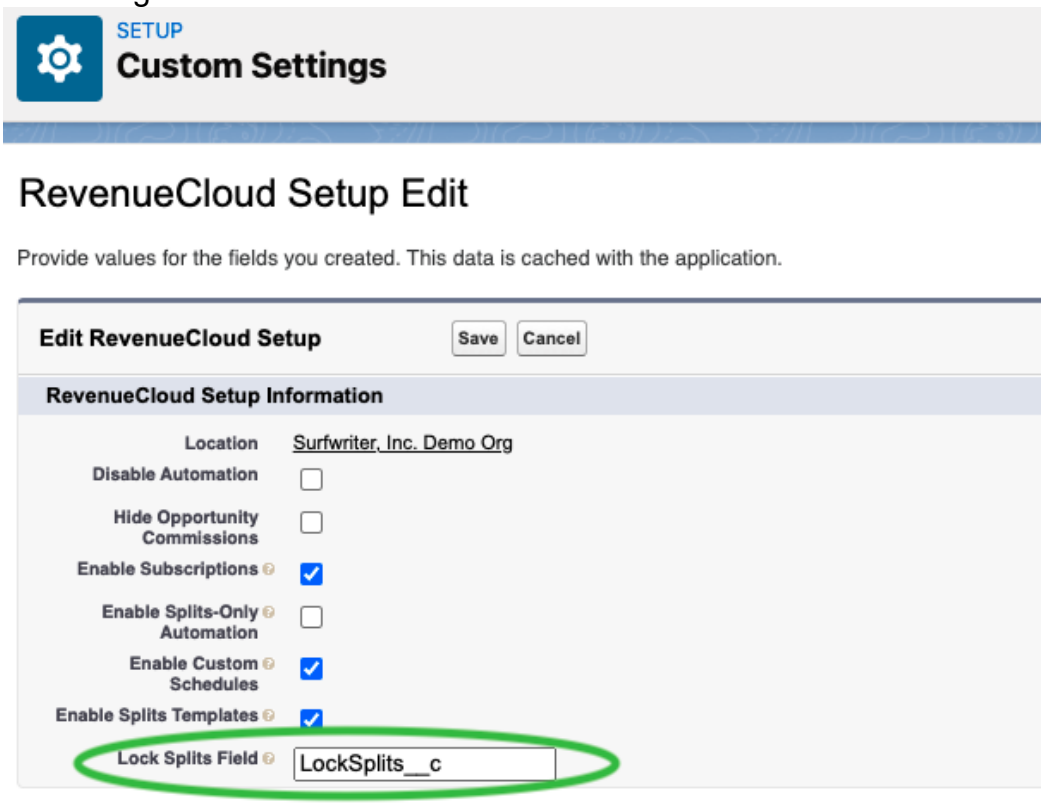
2. Set field-level security to give Read access to Sales Reps and Edit access to Managers and Administrators.



3. Enter the exact API name of the field in the RevenueCloud Setup Custom Setting.



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RevenueCloud Data Model - Understanding RevenueCloud Products and Schedules

The RevenueCloud Product object mirrors the standard Opportunity Product object and the RevenueCloud Line Item Schedule object mirrors the Standard Opportunity Line Item Schedule object. However in the RevenueCloud data model there is always at least one RevenueCloud Product and one RevenueCloud Line Item Schedule record created for each Opportunity, even if there are no Products or Schedules in the Opportunity, thereby enabling all types of Opportunities (those with or without Products and Schedules) to be compatible with a single Report Type.

The RevenueCloud Line Item Schedule object is where the granular data by Rep and Product is stored and this object is customizable (unlike the standard Line Item Schedule object) so almost infinite customization capabilities can be achieved by adding formula fields to the RevenueCloud Line Item Schedule object where you have access via cross-object formula to everything in the Revenue Split, Product Split, User, Opportunity, Account, Product and more.

Viewing RevenueCloud Line Item Schedules (RCLIS)

There is no direct data entry or user interaction required for the RevenueCloud Product or RCLIS objects. So it is advisable to not add the RevenueCloud Objects as related lists to your Opportunity Page layout as this could just needlessly confuse your users.

The RevenueCloud Product RC Product and RevenueCloud Line Item Schedule (RCLIS) records are automatically generated by RevenueCloud for use in reporting and integration via API. You can think of the RevenueCloud App like a little data warehouse within the Salesforce Sales Cloud.

As a Salesforce Administrator or Power Salesforce User, you may find it very useful to view the RC Products and RCLIS so you can gain a better understanding of how your RevenueCloud data is structured. This will be especially useful if you choose to extend the RevenueCloud objects with your own custom fields, which is a significant strength of the RevenueCloud data model.

To view the RC Products and RCLIS associated with your Salesforce Opportunity Products, edit the Opportunity Product Page layout and drag the RevenueCloud Product lookup field onto your layout. This will enable you to easily browse and explore the RevenueCloud data. Again, this would only be for development and inspection purposes, so you may wish to only make this change on your Administrator page layout.

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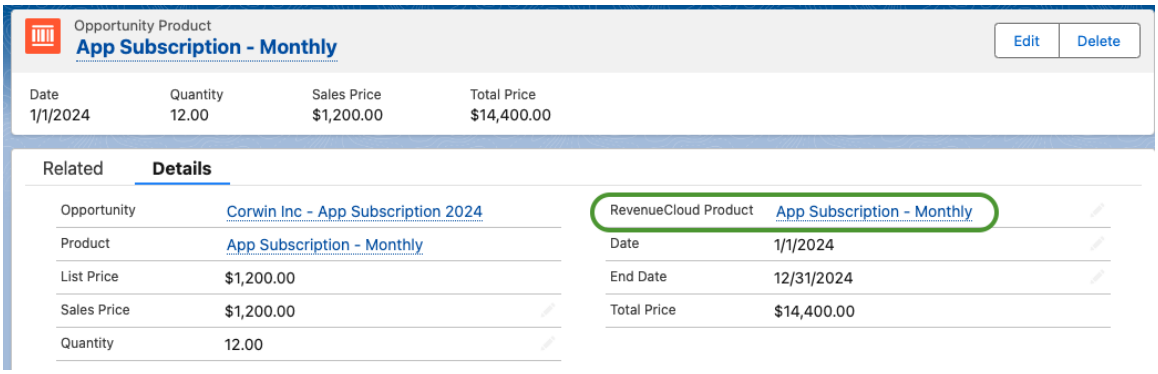
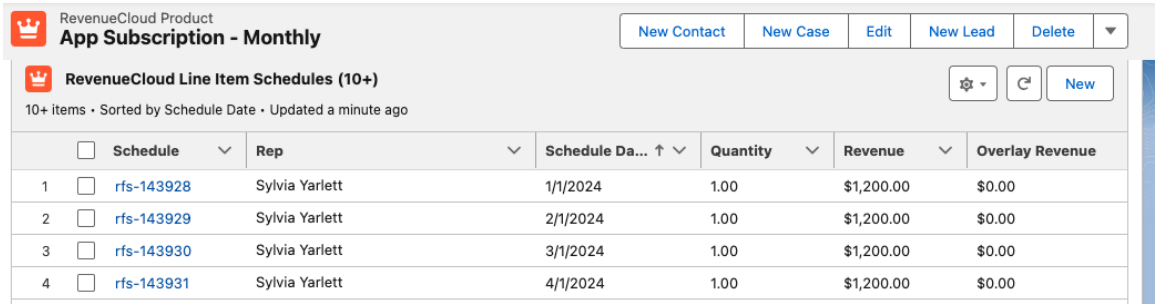
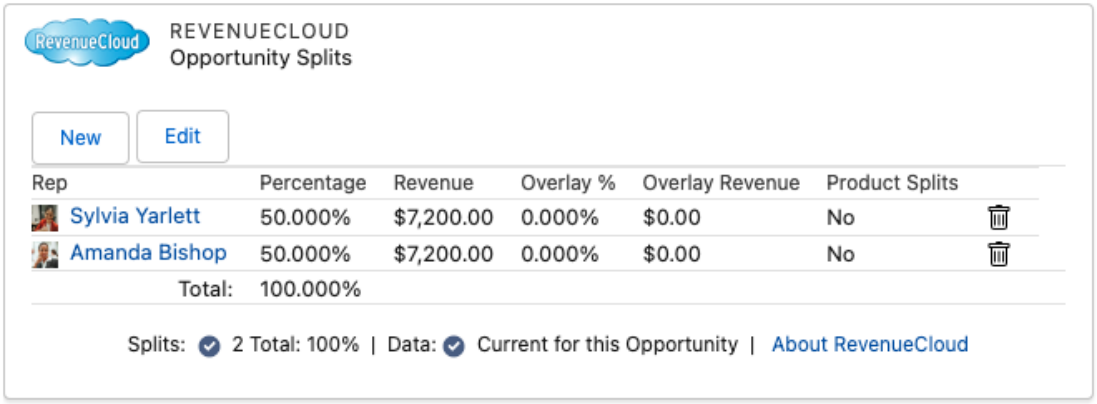


After saving your Opportunity Product page layout, you may now click on the RC Product field on any Opportunity Product to view the RC Product and RCLIS associated with all of your Opportunity Products. Sylvia has a 100% default split on the Opportunity. The screenshot below displays the first 4 of the 12 monthly schedule entries.



Now we will update the splits on our Opportunity to be a 50/50 split between Sylvia and Amanda



Now if we navigate to the RC Product to view the RCLIS entries again, we will see 24 entries. 12 for each rep, for the 12 month schedule:

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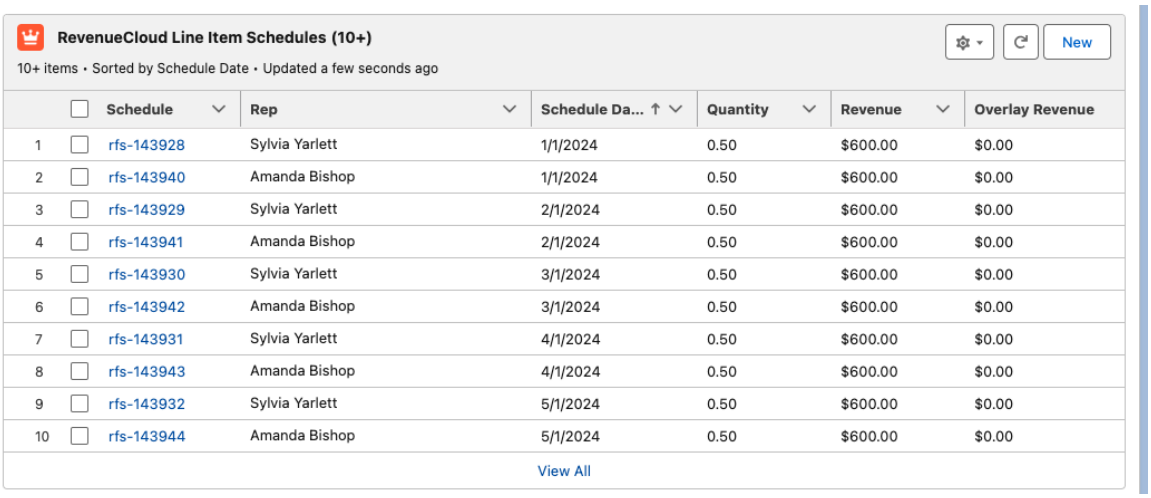


RevenueCloud Line Item Schedules (10+)

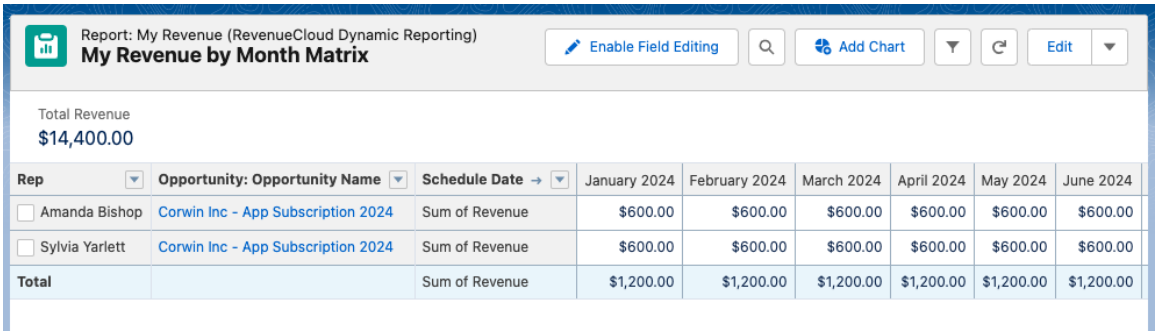
10+ items • Sorted by Schedule Date • Updated a few seconds ago

New

	Schedule	Rep	Schedule Da...	Quantity	Revenue	Overlay Revenue
1	rfs-143928	Sylvia Yarlett	1/1/2024	0.50	$600.00	$0.00
2	rfs-143940	Amanda Bishop	1/1/2024	0.50	$600.00	$0.00
3	rfs-143929	Sylvia Yarlett	2/1/2024	0.50	$600.00	$0.00
4	rfs-143941	Amanda Bishop	2/1/2024	0.50	$600.00	$0.00
5	rfs-143930	Sylvia Yarlett	3/1/2024	0.50	$600.00	$0.00
6	rfs-143942	Amanda Bishop	3/1/2024	0.50	$600.00	$0.00
7	rfs-143931	Sylvia Yarlett	4/1/2024	0.50	$600.00	$0.00
8	rfs-143943	Amanda Bishop	4/1/2024	0.50	$600.00	$0.00
9	rfs-143932	Sylvia Yarlett	5/1/2024	0.50	$600.00	$0.00
10	rfs-143944	Amanda Bishop	5/1/2024	0.50	$600.00	$0.00

View All

Now our RevenueCloud “My Revenue” report viewed as “All Revenue” and drilled down to our example Opportunity, displays our 12 month revenue schedule split 50/50 between Sylvia and Amanda.



Report: My Revenue (RevenueCloud Dynamic Reporting)

My Revenue by Month Matrix

Enable Field Editing | Add Chart | Edit

Total Revenue

$14,400.00

Rep	Opportunity: Opportunity Name	Schedule Date	January 2024	February 2024	March 2024	April 2024	May 2024	June 2024
Amanda Bishop	Corwin Inc - App Subscription 2024	Sum of Revenue	$600.00	$600.00	$600.00	$600.00	$600.00	$600.00
Sylvia Yarlett	Corwin Inc - App Subscription 2024	Sum of Revenue	$600.00	$600.00	$600.00	$600.00	$600.00	$600.00
Total		Sum of Revenue	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00

If we want to create a weighted pipeline report for open Opportunities, we can simply add and summarize the Expected Revenue and Expected Quantity from RCLIS to our report.

Configuration - Sync Custom Opportunity Product Fields to RevenueCloud Product Object

Sync custom Opportunity Product fields to RevenueCloud Product

If you have custom Opportunity Product fields that you would like to utilize in RevenueCloud reports, then you need to add these fields to the RevenueCloud Product object (RC Product) to enable RevenueCloud to automatically sync them. To accomplish this, simply follow these steps:

1. Navigate to Setup->Create->Objects->RevenueCloud Product.
2. For each of your Custom Opportunity Product fields, create a matching field on the RC Product object. The fields must be created as the exact same field type and exact same API name, so please double check that you have spelled the API names of the fields in precisely the same way

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and have selected the exact same field type for each one. You can make the field labels whatever you like.

3. If you would like to apply splits to any of your custom Opportunity Product fields, you can create new cross-object formula fields on the RevenueCloud Line Item Schedule (RCLIS) object and multiply Split or Overlay Percentages from the parent Revenue Split record to the value from your custom Opportunity Product fields.
4. If you have not already created a clone of the included RevenueCloud "My Revenue" (Managed) Report type, do so now to create a customizable report type to include your Opportunity, RC Product, Product and RCLIS fields.
5. Add your custom fields from all objects to your customizable report type for use in your production RevenueCloud reports.

Reporting - Viewing RevenueCloud Reports & Data

Tip: Clone the managed report types to create your own customizable RevenueCloud report types*: To add your custom fields to RevenueCloud reports, simply create clones of the RevenueCloud (managed) report types that installed with the managed RevenueCloud App. Now you will have fully customizable RevenueCloud Report Types that can be edited to include your custom fields. Use these customizable report types to create your production RevenueCloud reports. New custom fields you create in the future will also be able to be added.*

My Revenue Report

To view RevenueCloud data, navigate to Reports, choose the "RevenueCloud Reports" folder and select the report "My Revenue by Month Matrix".

The "My Revenue" report type in RevenueCloud provides personalized dynamic reporting that displays any RevenueCloud user's splits regardless of Opportunity Ownership.

Choice	Description
My revenue	Displays only the running user's splits
My team's revenue	Displays all splits in the user's team according to role hierarchy settings in Salesforce
All revenue	Displays all splits summarized by user

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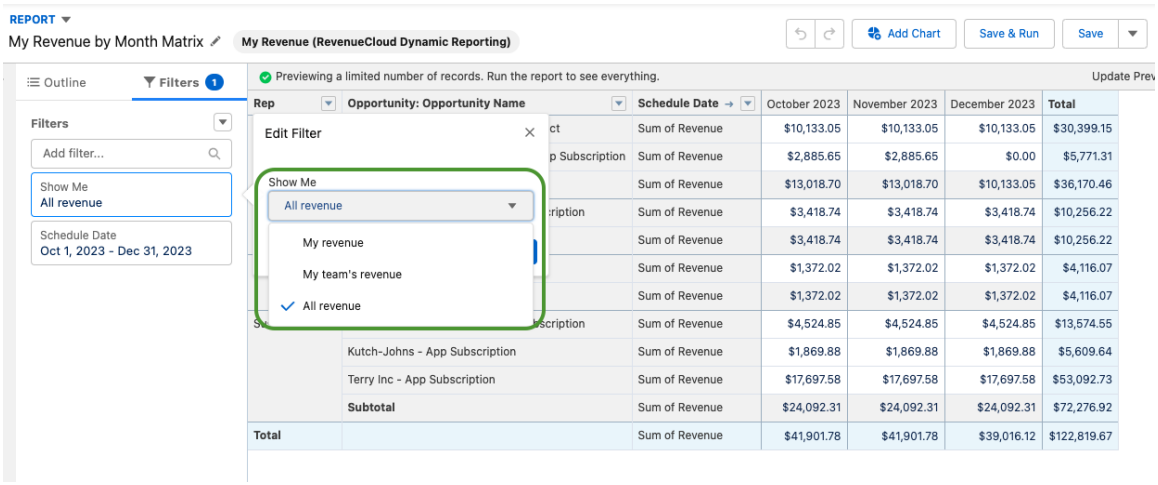

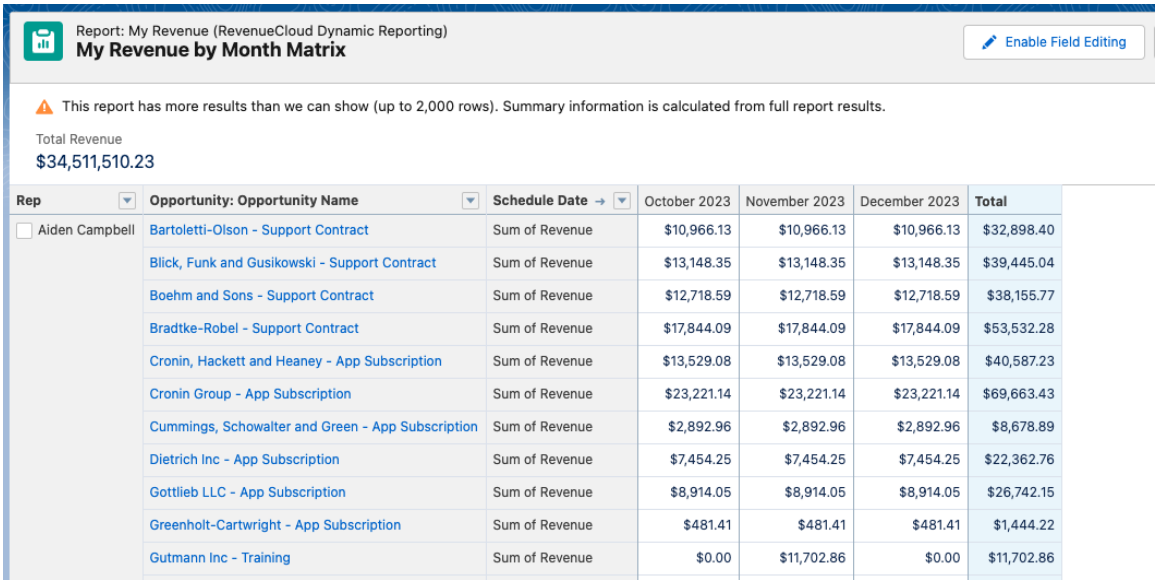

RevenueCloud Dashboards

The RevenueCloud example Dashboard demonstrates running dashboards from RevenueCloud reports. This example dashboard is intended to serve as a starting point and may of course be customized and / or extended as you see fit in order to support the specific visibility, sharing and security requirements of your organization.

Remember when constructing reports and dashboards for your production use, that you should always use customizable report types as the basis for your reports. You can make your customizable report types by cloning the managed report types that installed with RevenueCloud. This will enable including your custom fields from your org into RevenueCloud reports.

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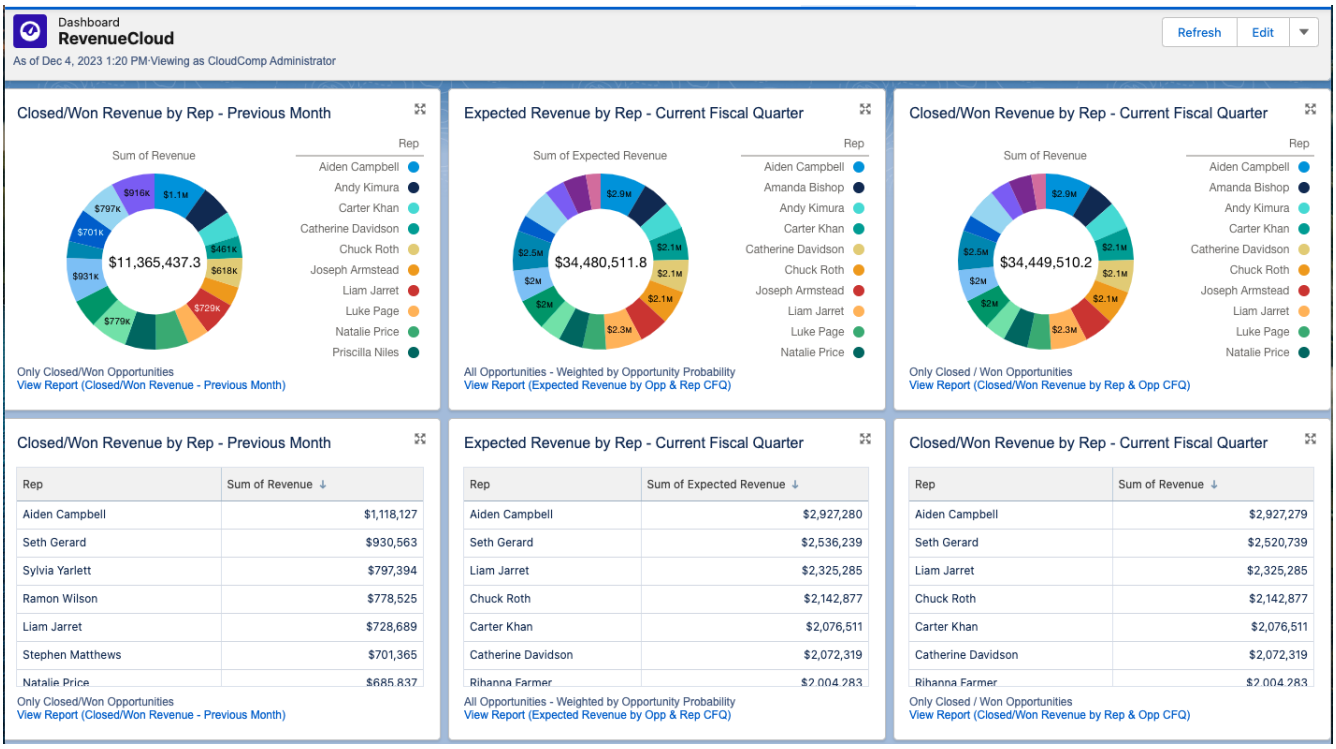

Configuration – RevenueCloud Field Sets

About field sets

Field sets on the two splits objects, rf__RevenueSplit__c, rf__ProductSplit__c the Template Split object rf__Split__c and the Custom Schedule object rf__CustomSchedule__c, enable you to control which fields are displayed in the RevenueCloud Interfaces, the order in which the fields are displayed and also enable you to add your own custom fields for viewing and editing by your users in RevenueCloud.

Configuring field sets

Salesforce field sets are only accessible in Salesforce Classic setup. From Salesforce Classic Setup: Go to Setup->Create-Objects->[object]. Scroll down to the field set and click “Edit”. You can adjust the order of the fields in the section called “In the Field Set”, remove existing fields by dragging them out of the section or drag your own new custom fields in.

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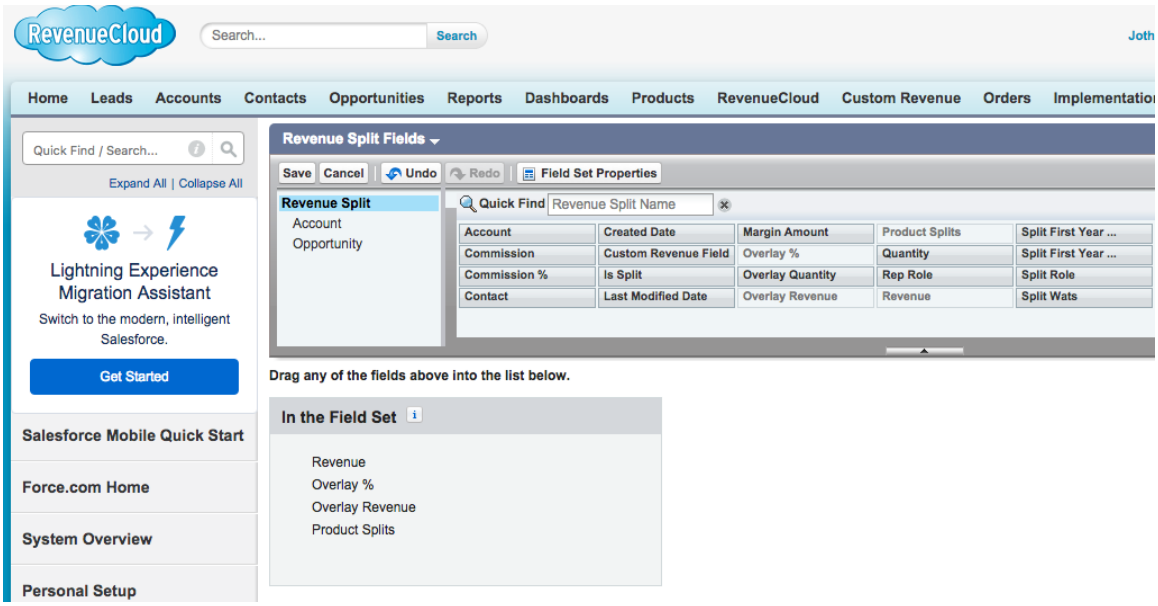

Configuration - RevenueCloud Automation

RevenueCloud is automated with Apex triggers to enable RevenueCloud data to be maintained as Opportunities are created and edited by your Sales Team.

RevenueCloud Automation is enabled by default when you install the App. Your data will be immediately updated whenever any RevenueCloud Licensed User creates or edits an Opportunity or creates or edits RevenueCloud Opportunity or Product Splits on an Opportunity.

If a situation were to occur in your org where you had a problem with a custom developed Apex Trigger in your org which was looping or throwing errors, or you were performing high volume Opportunity data imports or edits via the Salesforce API, then you may wish to temporarily disable the RevenueCloud triggers. This is easy to do.

How to Disable RevenueCloud Triggers

RevenueCloud Automation may be disabled in the Custom Settings of your Salesforce.com Org. This enables your Salesforce Administrator to turn off all RevenueCloud Triggers for specific Users and / or Profiles. For example, users engaged in development and debugging of Apex Triggers, users performing mass data loading or other resource-intensive tasks.

Navigate to RevenueCloud Custom Settings

Go to: Setup->Develop->Custom Settings->RevenueCloud Setup, Click “Manage”.

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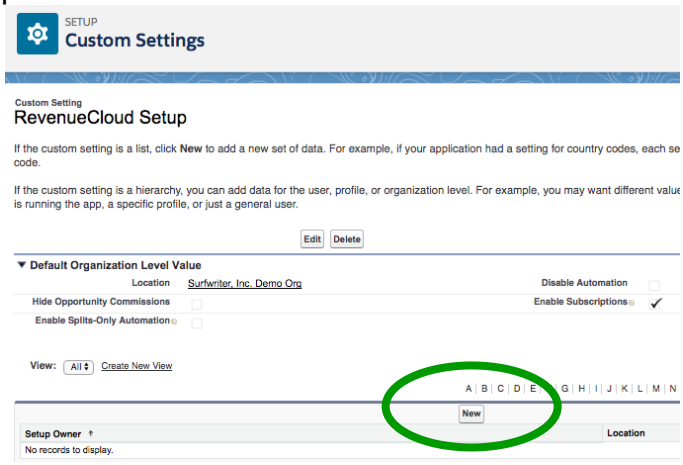
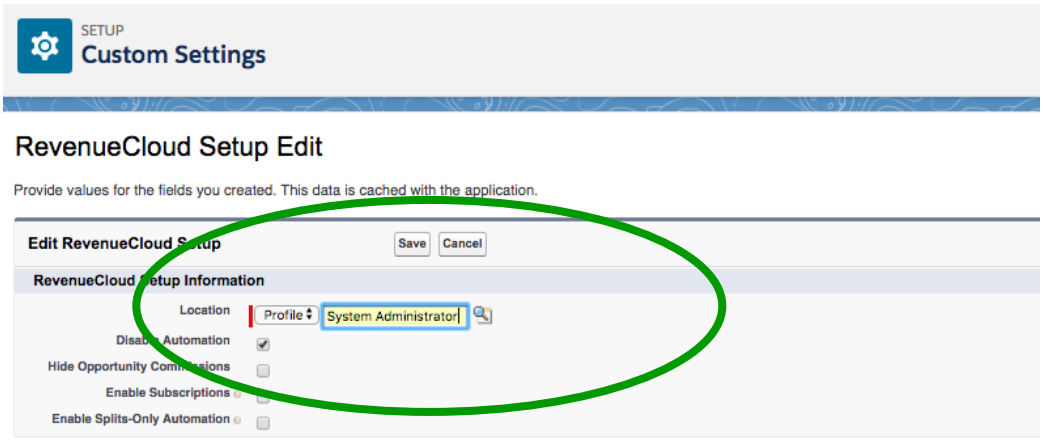
Disable Automation for Specific Users or Profiles

To disable RevenueCloud Automation (Apex triggers) for specific users or profiles: Click on the lower “New” button in RevenueCloud Setup.



Browse to a specific User or Profile, select “Disable Automation” and click “Save”.



Automation - Set Org Default

To quickly disable all RevenueCloud triggers for all RevenueCloud-licensed users, click on “New” above “Default Organization Level Value” (see screen shot),
Check the box for “Disable Automation” and click “Save”.

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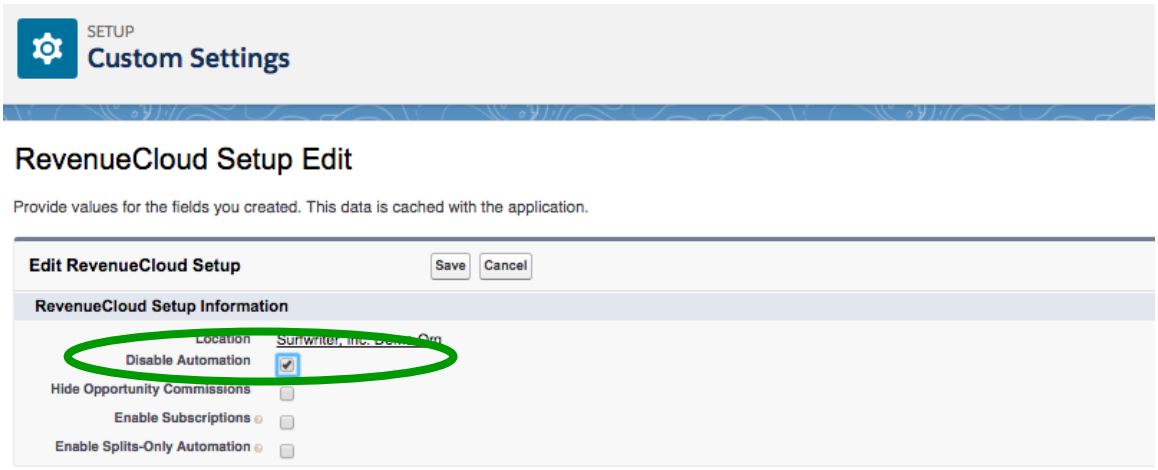

Configuration - Advanced Currency Management with Dated Exchange Rates

RevenueCloud includes support for Dated Exchange Rates and it can detect whether you have them enabled in your Salesforce Org.

Salesforce actually only supports its Dated Exchange Rate functionality on standard Opportunity currency fields. Salesforce parenthetical conversions on all custom objects will always only be static exchange rates. RevenueCloud has an elegant solution for this built in, which enables conversion of all currency values to your Corporate Currency according to your dated exchange rates.

The RevenueCloud Line Item Schedule (RCLIS) object includes a field called Exchange Rate (rf__ExchangeRate__c). If you have enabled and populated Dated Exchange Rates in your Salesforce Org, RevenueCloud will be automatically populating the Exchange Rate field on each RCLIS record each time the record is updated by RevenueCloud, with the appropriate static or dated exchange rate to the corporate currency according to the date in the RCLIS Schedule Date field (rf__ScheduleDate__c).

Convert Split Revenue Currency Amounts using Dated Exchange Rates
To perform currency conversions using dated exchange rates on RevenueCloud Line Item Schedule:

1. Create custom Formula Fields of type: Number, to multiply rf__Revenue__c and any other currency fields on RCLIS by the rf__ExchangeRate__c (percentage) field to get converted values.
   Note: Number fields are used instead of currency fields because otherwise Salesforce will convert them using the non-dated, default exchange rates.
2. Add your new converted fields to your customizable RevenueCloud Report Types and you will now have all your currencies converted to corporate currency according to your exchange rates.

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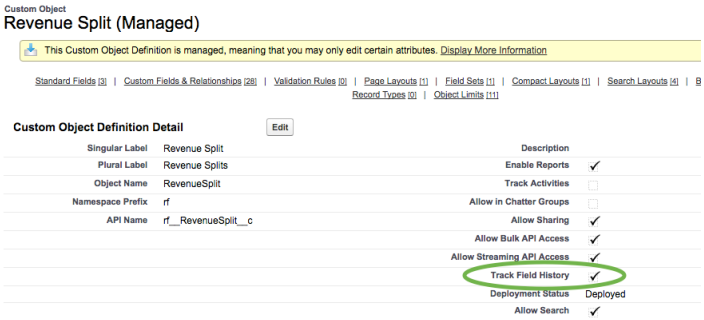
Configuration – Enable History Tracking for Revenue Split object

Salesforce History Tracking can maintain an audit trail of changes made to RevenueCloud Opportunity Splits. To use History Tracking, it must be enabled on the Revenue Split object and the fields you wish to track must be selected. You can view the History Tracking records via the RevenueCloud Page (see section on RevenueCloud Page for more information).

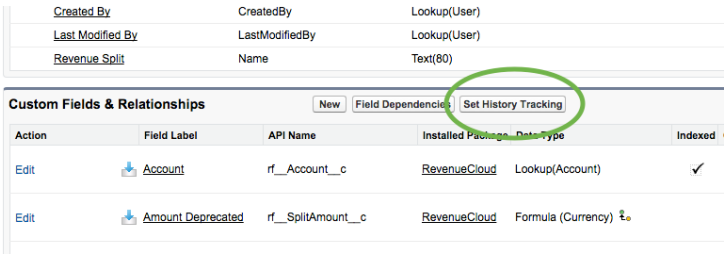
Enable History Tracking for the Revenue Split Object

Edit the Revenue Split object and set “Track Field History” to true



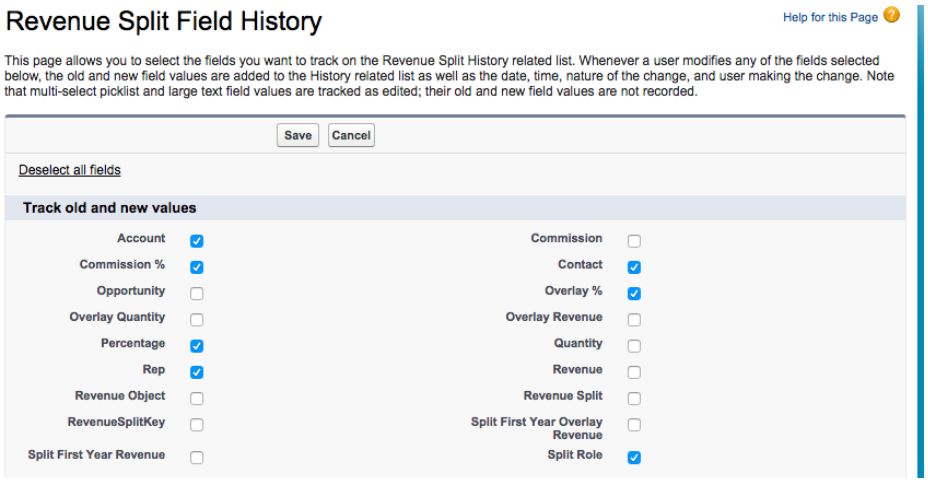
Set History tracking for the Revenue Split fields

Click the “Set History Tracking” button on the Revenue Split object to select fields to track.



Set History tracking for the Revenue Split fields

Select the fields to include in History Tracking and click “Save”.



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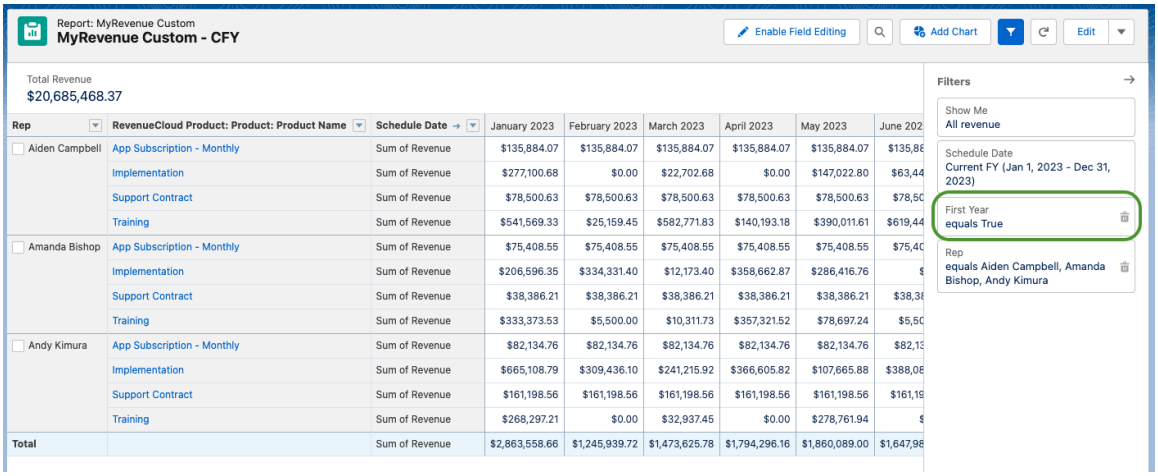
Customization – Add Custom Fields to RevenueCloud Objects

The ability to add custom fields to the RevenueCloud Objects enables a wide array of solutions with minimal button-click admin work.

Customization Example – Capture First Year of Scheduled Revenue
A formula on RevenueCloud Line Item Schedule (RCLIS) records can identify each schedule entry as either in or out of the first year of contract by comparing the schedule date of the RCLIS entry to the Close Date, or better yet, to a custom Contract Start Date field on each Opportunity.

Example First Year formula:
IF(rf__ScheduleDate__c >=rf__RevenueSplit__r.rf__Opportunity__r.Contract_Start_Date__c && rf__ScheduleDate__c <= rf__RevenueSplit__r.rf__Opportunity__r.Contract_Start_Date__c + 364, TRUE, FALSE)

A My Revenue Report can now be filtered for “First Year equals true” to capture the first 365 days of scheduled Revenue from contract start dates in all Opportunities (remember to add the new formula field to your customizable report type so you can include it in your reports).



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Customization Example – Create a Custom Rollup of First Year Revenue on the Revenue Split Object

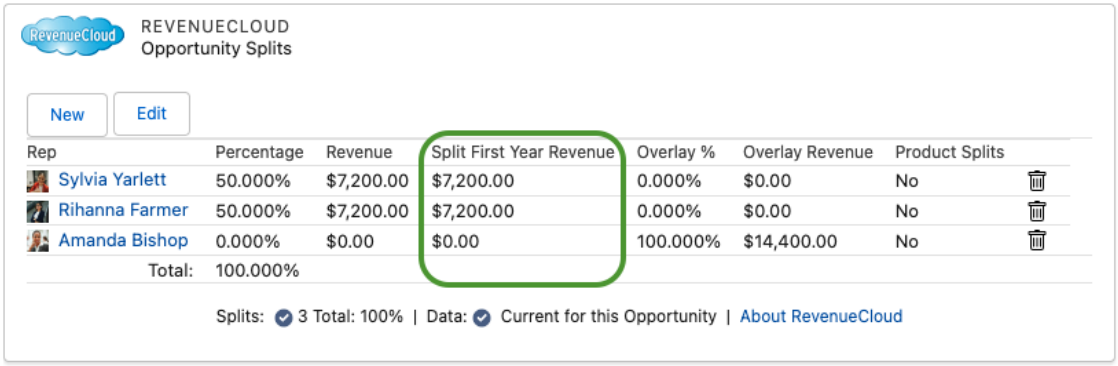
RevenueCloud supports creation of custom rollup fields on the Revenue Split Object to summarize amounts from RevenueCloud Line Item Schedules.

In this example we're going to roll up the value of a custom formula field on RevenueCloud Line Item Schedule called FirstYearRevenue__c. The formula displays the value of the RevneueCloud Line Item Schedule (RCLIS) Revenue field when FirstYear__c formula is true and zero when false.

Here is the formula: IF(FirstYear__c == true, rf__Revenue__c,0.00)
To enable the rollup on the Revenue Split object we're going to perform the following steps.

1. Create a new field on the Revenue Split object that is the exact same API name and exact same type as the field on RevenueCloud Line Item Schedule that you want to roll up. The label can be whatever you want. We set the API name of the field to FirstYearRevenue__c the type to Currency and the label to "Split First Year Revenue"
2. Add the new field on Revenue Split to the Revenue Split Fields field set
3. Add the formula field on RCLIS to the "Line Item Schedule Summary Fields" field set.

Here we see the FirstYearRevenue__c field Labeled "Split First Year Revenue" displayed in the RevenueCloud Panel.



Customization Example – Create a Custom Picklist field on the Revenue Split object

In some organizations it is useful to be able to track splits by custom roles. This is easy to do by simply adding a picklist field to the Revenue Split object and populating it with the roles you wish to use on splits.

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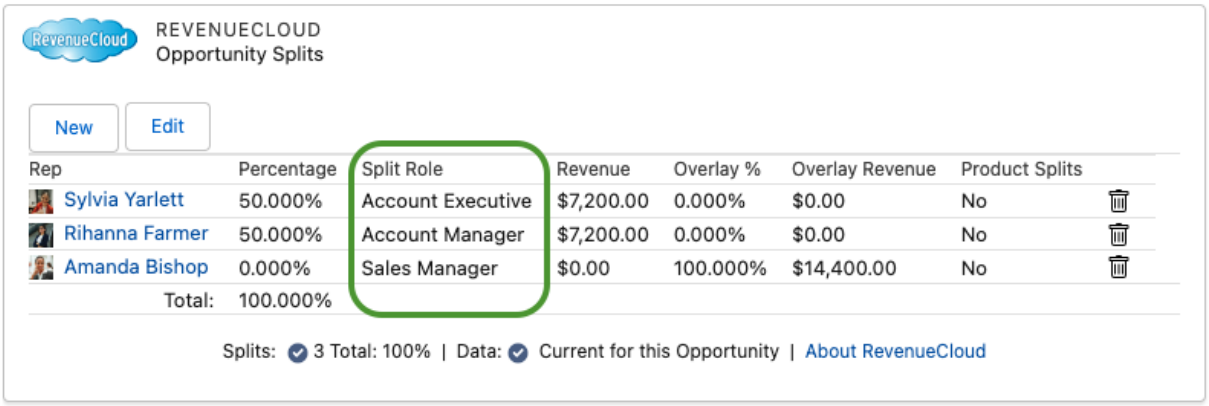

Implementation – RevenueCloud Data Import

Tip: the RevenueCloud Data Import App is intended for trained and experienced Salesforce Administrators only*. If you have any questions please contact Surfwriter for more information.*

Before running the RevenueCloud Data Import App, as with any mass-update operation, you should always test in your sandbox prior to running in production.

Please be certain that you have disabled any workflow rules or apex triggers that may perform any processes upon Opportunity Saves that you do not wish to perform during your RevenueCloud Data Import.

Why perform a data import into RevenueCloud?

When you first install RevenueCloud into your Sandbox or Production Salesforce Org, none of your Opportunity Data will have been imported into RevenueCloud, so if you view any of the RevenueCloud Example Reports prior to editing any Opportunities, you will not see any records.

Now, if you navigate to any Opportunity and click “Edit” and “Save”, you will see that RevenueCloud will insert a default 100% Revenue Split and for the Opportunity Owner and behind the scenes, all of the RevenueCloud Objects will have been populated with the current data for this Opportunity. Next, if you return to a RevenueCloud Example Report, set the date range to be appropriate for your Opportunity and run the report, you should see the Opportunity that you just edited displayed in the report.

Editing a few Opportunities manually is certainly fine for trying out the functionality of RevenueCloud, however when you deploy RevenueCloud to production, you’re going to want to have all of your Opportunities reflected in your RevenueCloud reporting.

Once you’ve imported all your Opportunity data into RevenueCloud, your RevenueCloud reporting will be able to agree with any other Opportunity report

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even though your RevenueCloud data will contain far greater granularity than your standard Opportunity data.

How to import your Opportunity data into RevenueCloud

To import all of your Opportunity Data into RevenueCloud, you can use the API data loading tool of your choice to simply edit and save each Opportunity (***in order to comply with Salesforce Governor Limits, please be sure to set your batch size to 10***), or you may install and use our **Free RevenueCloud Data Import App**.

The RevenueCloud Data Import App will update all of your Opportunities or those within specific Close Date Ranges according to the settings you choose. RevenueCloud will not change any data in any of your standard or custom Opportunity fields, it will only populate data to its own fields; however, since it will save each Opportunity in the process, the last update field of each Opportunity will reflect the date that you ran the data import.

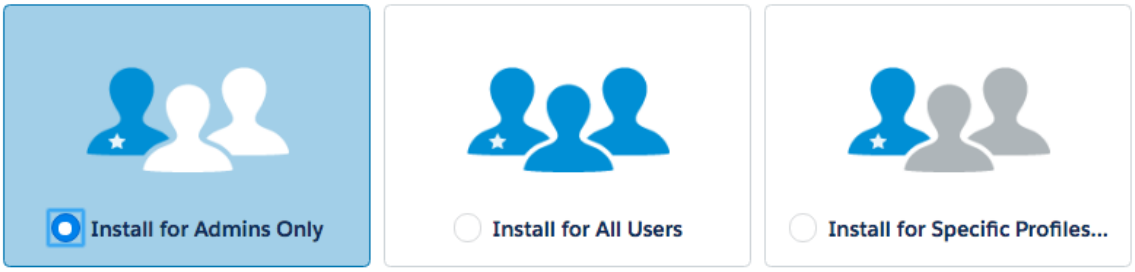
IMPORTANT! Before running the RevenueCloud Data Import App, please be certain that you have disabled any Workflow rules or triggers that may perform any processes upon Opportunity Saves that you do not wish to perform during your RevenueCloud Data Import. Such unwanted processes may include creation of tasks, field updates, sending out of emails, chatter posts, etc.

Install the Free RevenueCloud Data Import App

1. Use this URL to install the package into any Production organization:
   https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0P000000QvZP
   Use this URL for any Sandbox organization:
   http://test.salesforce.com/packaging/installPackage.apexp?p0=04t0P000000QvZP

   Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with http://test.salesforce.com

2. Select “Install for Admins Only”.



Running the Free RevenueCloud Data Import App

To open the RevenueCloud Data Import App in Lightning, navigate to the App Launcher and select RevenueCloud Import. In Classic, select RevenueCloud

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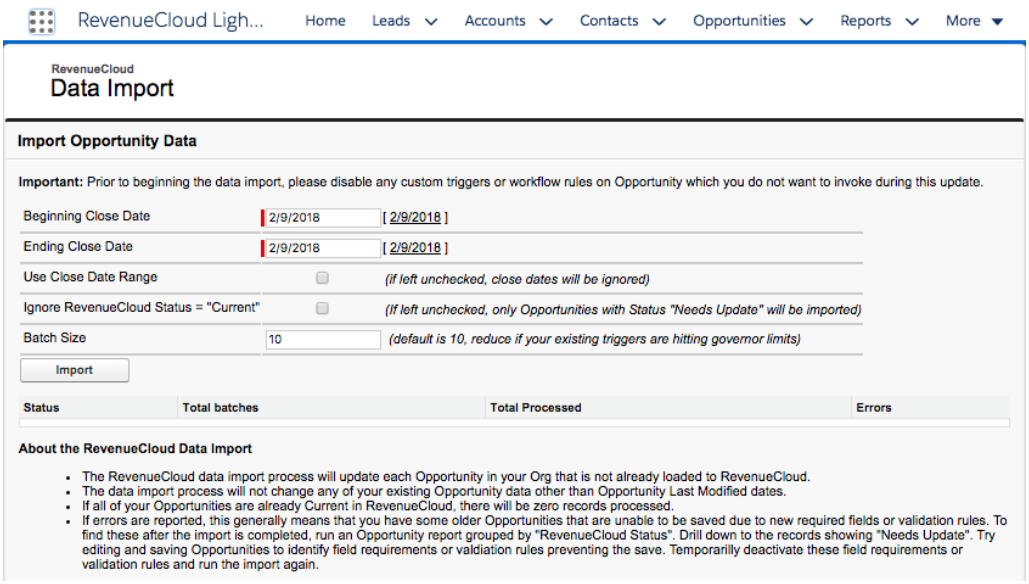
Import from the App Menu or click on the “+” to the right of your Salesforce Tabs to view All Tabs, and then click on the Tab called “RevenueCloud Import”.

To run a standard RevenueCloud Data Import, choose the Close Date Range of your choice, select “Use Close Date Range to enable import by Close Date Range, and click “Import” once. A few moments after you click “Import”, the page will begin to update and will display the number of batches to be processed, the number processed successfully and any batches where errors were encountered.



An error will be thrown and a batch will be skipped for any instance of an Opportunity that is unable to be edited and saved. This is usually caused by unsatisfied validation rules or required fields. These records can be updated manually to satisfy the unsatisfied conditions, or you can disable the validation rules and run the RevenueCloud Data Import App again.

How to Abort a RevenueCloud Data Import Job

The RevenueCloud Data Import App runs as an Apex Batch Job. To stop it once it’s been started, navigate to setup and enter “apex jobs” into the setup search field as shown. If your job is still running, there will be a link called “Abort”. To stop the job, click on the “Abort” link.

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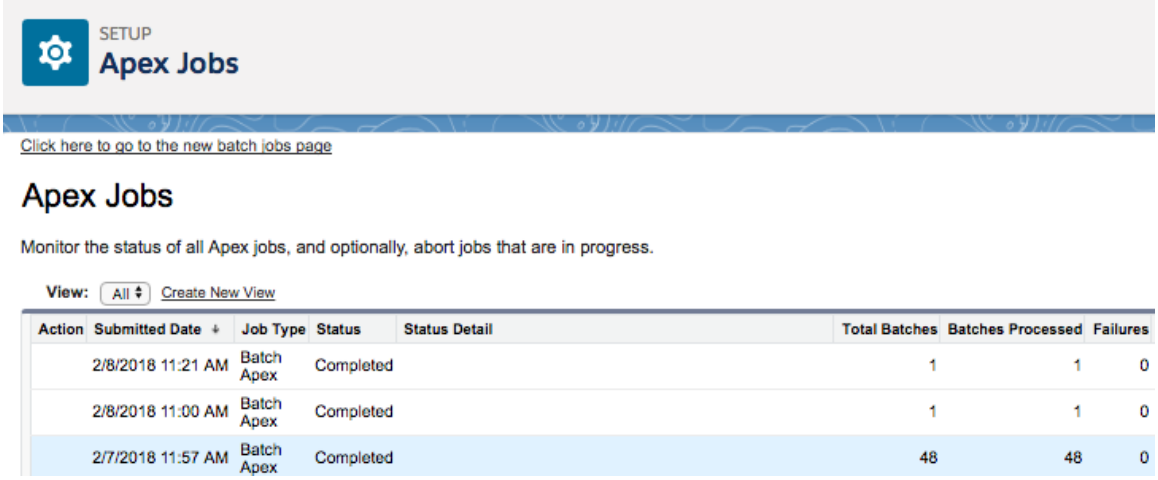

Viewing the Status of your RevenueCloud Data

To view the status of your RevenueCloud data, navigate to the RevenueCloud Reports Folder and open the report called “All Opportunities by RevenueCloud Status”, set the Close Date range on the report to associate with the Close Date Range you used for your import and click “Run Report”. The report is summarized by the RevenueCloud field “RevenueCloud Status”. All of the Opportunities which have been successfully imported into RevenueCloud will be grouped under the heading “Current” and any that have not been imported will be grouped under the heading “Needs Update”.

To discover the cause of Opportunities in status “Needs Update”, simply navigate to those Opportunities in your report and try clicking “Edit” and “Save”. You should be able to easily discover the unsatisfied validation rules or required fields that caused the Opportunities to be unable to be edited by the RevenueCloud Import App or your API data loading tool. Remember, however that if you’re using a batch size of 10, it only takes 1 non-editable Opportunity to prevent a batch of 10 from being imported, so you may want to reduce your batch size to 1 to be sure that the only Opportunities which will show up as “Needs Update” will be those which were unable to be edited.

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