

RevenueCloud Customization Guide V1.1x

Contents

RevenueCloud Customization Guide V1.1x	1
RevenueCloud App Installation.....	2
1. Before Installing App – Enable Quantity & Revenue Scheduling (Important!):.....	2
Configuration – RevenueCloud Button	3
2. Add RevenueCloud Button to Opportunity Page Layout.....	3
Configuration – RevenueCloud Fields (Professional Edition).....	4
3. Add RevenueCloud Fields to Opportunity Page Layout – (Required for Salesforce Professional Edition).....	4
Configuration – RevenueCloud Panel for Opportunity Page	6
4. Install RevenueCloud Panel – Create New Section	7
5. Install RevenueCloud Panel – Drag “RevenueCloud Panel” to your page layout.....	8
6. Install RevenueCloud Panel – Configure VisualForce Page Properties... ..	9
Configuration – Assign RevenueCloud Licenses to Users.....	10
7. Assign Licenses (Important!)	10
Quick Start – Create a Revenue Forecast for an Opportunity	11
8. Quick Start – Select an Opportunity	11
9. Quick Start - Configure Splits	12
10. Quick Start - Generate Forecast	13
Viewing RevenueCloud Reports & Forecast Data.....	14
Viewing RevenueCloud Reports & Forecast Data (cont.)	15
RevenueCloud Dashboard	16
RevenueCloud Automation.....	17
11. Navigate to RevenueCloud Custom Settings.....	17
12. Automation – Disable Specific Users or Profiles (preferred)	18
13. Automation - Set Org Default	19

RevenueCloud App Installation



Tip: Quantity and Revenue Scheduling must be enabled in Salesforce.com prior to downloading and installing the App from the AppExchange in order for the install to succeed.

1. Before Installing App – Enable Quantity & Revenue Scheduling (Important!):

Verify that both Product Quantity and Revenue Scheduling are enabled for your Salesforce org. Navigate to: Setup->Products->Schedule Setup, Populate the check boxes as shown below and click Save.



Tip: After clicking “Save”, the checks will go away in “Enable quantity scheduling for all products” and “Enable revenue scheduling for all products”. Don’t worry about this. This is the standard behavior of this screen in Salesforce.

Schedule Setup - salesforce.com - Developer Edition - Mozilla Firefox

File Edit View History Bookmarks Tools Help

salesforce.com https://na3.salesforce.com/setup/pbk/orgAnnuityEnable.jsp?setupid=Product25ct

Schedule Setup ~ salesforce.com - D...

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Home Page Components
 - Home Page Layouts
 - Custom Links
- Activities
- Campaigns
- Leads
- Accounts
- Contacts
- Opportunities
- Quotes *New!*
- Forecasts

Schedule Setup

Enable or disable the ability to create schedules on products. Enabling both schedule types will delete all existing schedule information.

Schedule Setup ! = Required Information

Quantity Schedules	<input checked="" type="checkbox"/> Scheduling Enabled
	<input checked="" type="checkbox"/> Enable quantity scheduling for all products
Revenue Schedules	<input checked="" type="checkbox"/> Scheduling Enabled
	<input checked="" type="checkbox"/> Enable revenue scheduling for all products

Save Cancel

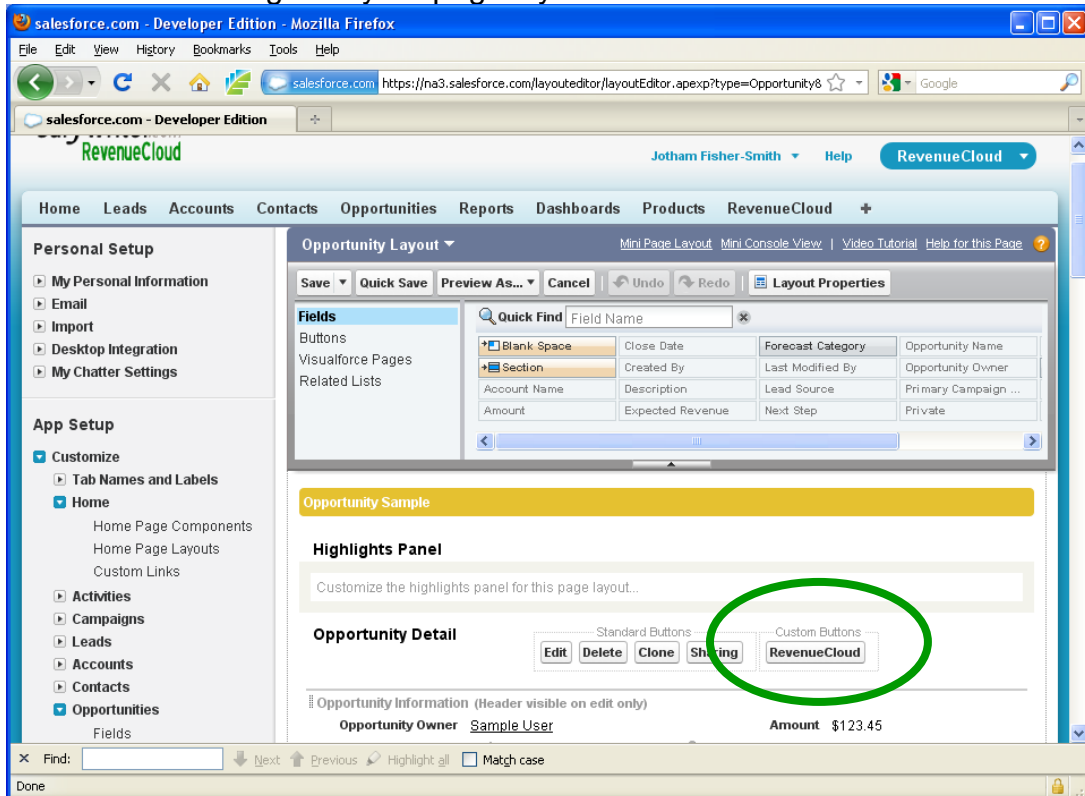
Find: [] Next Previous Highlight all Match case

Done

Configuration – RevenueCloud Button

2. Add RevenueCloud Button to Opportunity Page Layout

Navigate to Setup->Customize->Opportunities->Page Layouts, Click “Edit” on the page layout of your choice and drag the custom button “RevenueCloud” into your Opportunity Custom Buttons as shown in the next screen shot. Click Save to save changes to your page layout.



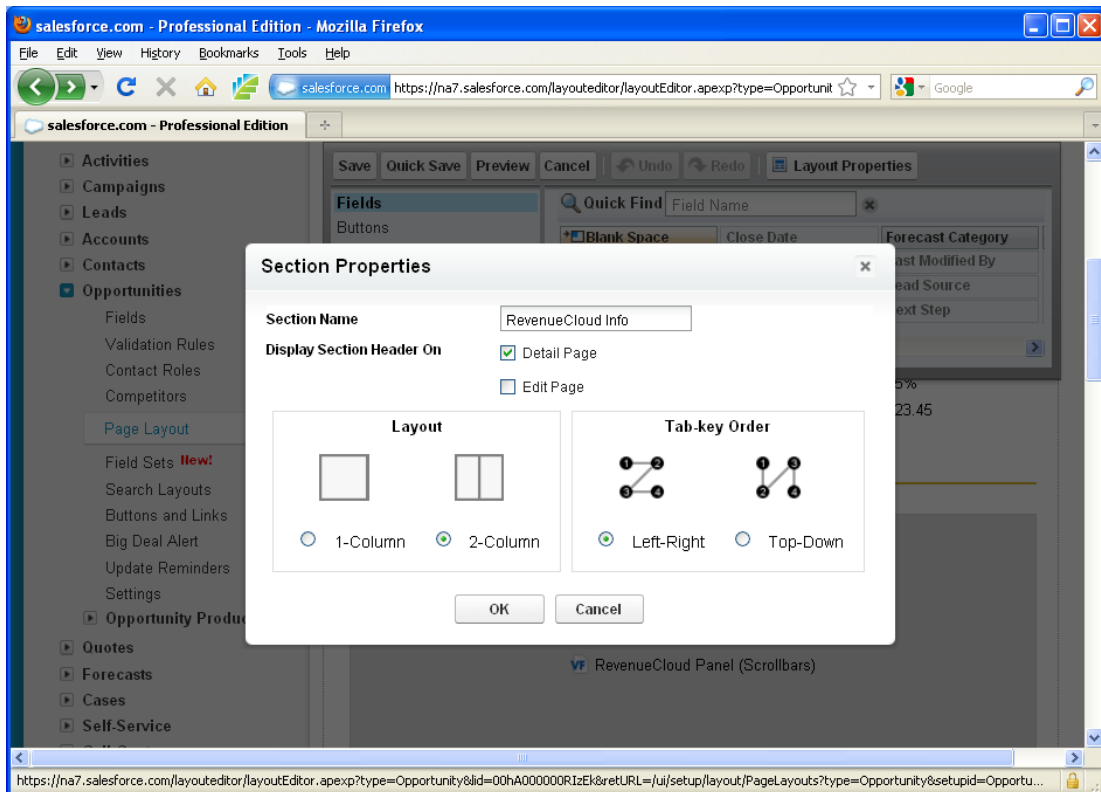
Configuration – RevenueCloud Fields (Professional Edition)

3. Add RevenueCloud Fields to Opportunity Page Layout – (Required for Salesforce Professional Edition)

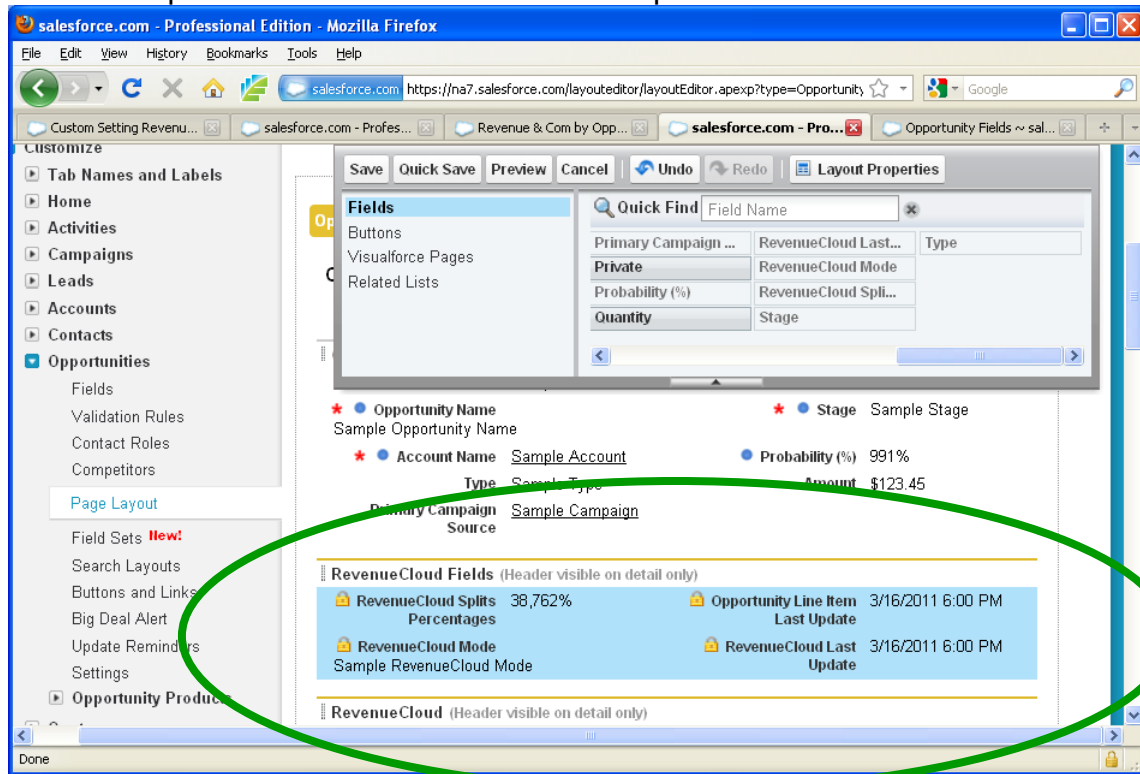
Create a new section called “RevenueCloud Info” in your Opportunity Page Layout



Tip: If you are using Salesforce Professional Edition, It is essential that these fields are on your page layout for RevenueCloud to function properly. If these fields are not on your page layout, the RevenueCloud Panel (in the Opportunity Detail Page) will not render and the Generate Forecast Button in the RevenueCloud Tab will be exposed with a message that the Forecast is not Current.



Drag the following four RevenueCloud fields to your Opportunity Page Layout: “RevenueCloud Splits Percentages”, “RevenueCloud Mode” “Opportunity Line Item Last Update” and “RevenueCloud Last Update”.



Configuration – RevenueCloud Panel for Opportunity Page



Tip: RevenueCloud also includes an inline Opportunity Detail Page Interface Component for managing your Opportunity Splits called “RevenueCloud Panel”. When used with RevenueCloud Automation (default), it will not be necessary to use the RevenueCloud Tab - all data will be updated during every opportunity update.

The screenshot shows the Salesforce interface for an Opportunity named "Apple Stores - iPad Promotion". The RevenueCloud panel is highlighted with a green oval. It displays the following details:

Opportunity Detail

Opportunity Owner	Lloyd Braun [Change]	Amount	\$722,000.00
Private	<input type="checkbox"/>	Expected Revenue	\$722,000.00
Opportunity Name	Apple Stores - iPad Promotion	Close Date	11/12/2008
Account Name	Apple	Next Step	
Type	New Customer	Stage	Closed Won
Lead Source	Purchased List	Probability (%)	100%
RevenueCloud Last Update	3/6/2011 10:53 AM	Primary Campaign Source	
RevenueCloud Splits Percentages	100%		
Opportunity Line Item Last Update	3/6/2011 10:36 AM		

RevenueCloud Opportunity Splits

OK - Revenue Splits: 2 Total: 100%

New Edit

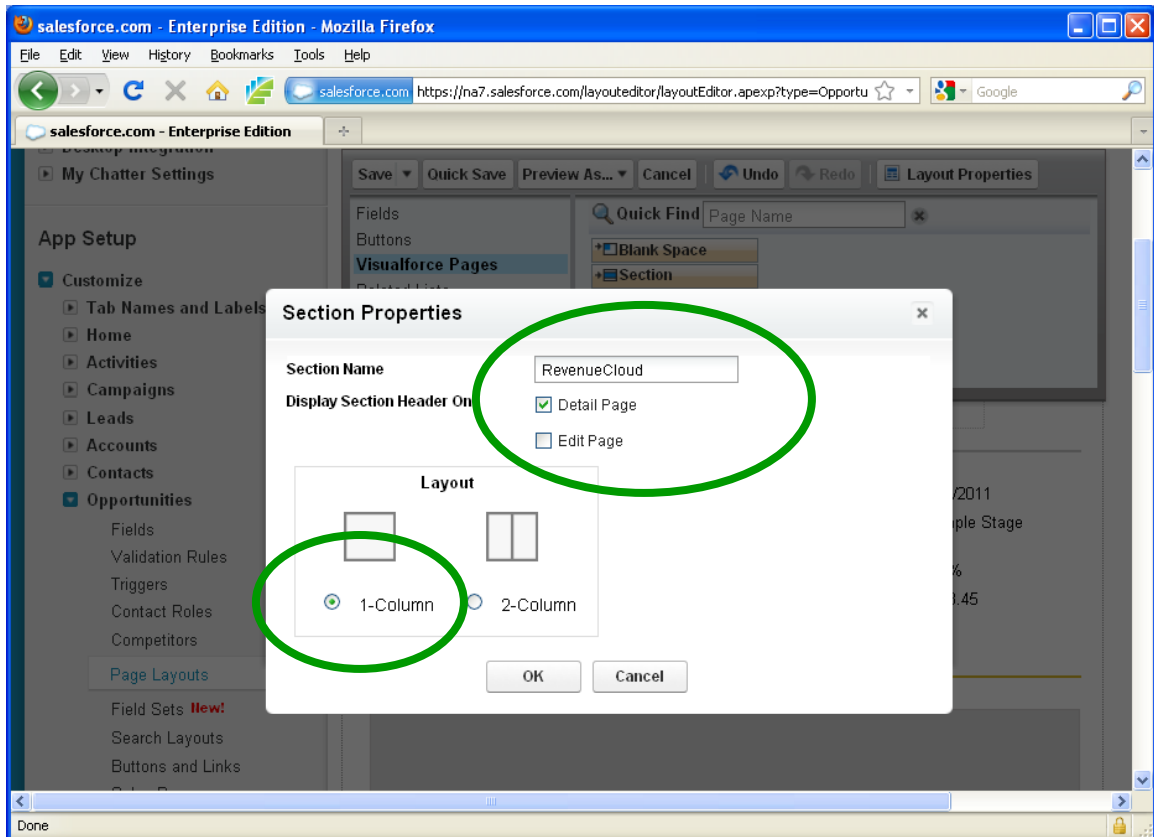
Split	Rep	Percentage	Commission
Apple Stores - iPad Promotion - Lloyd Braun	Lloyd Braun	40%	5.00% X
Apple Stores - iPad Promotion - Jotham Fisher-Smith	Jotham Fisher-Smith	60%	5.00% X
Total		100%	

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4. Install RevenueCloud Panel – Create New Section

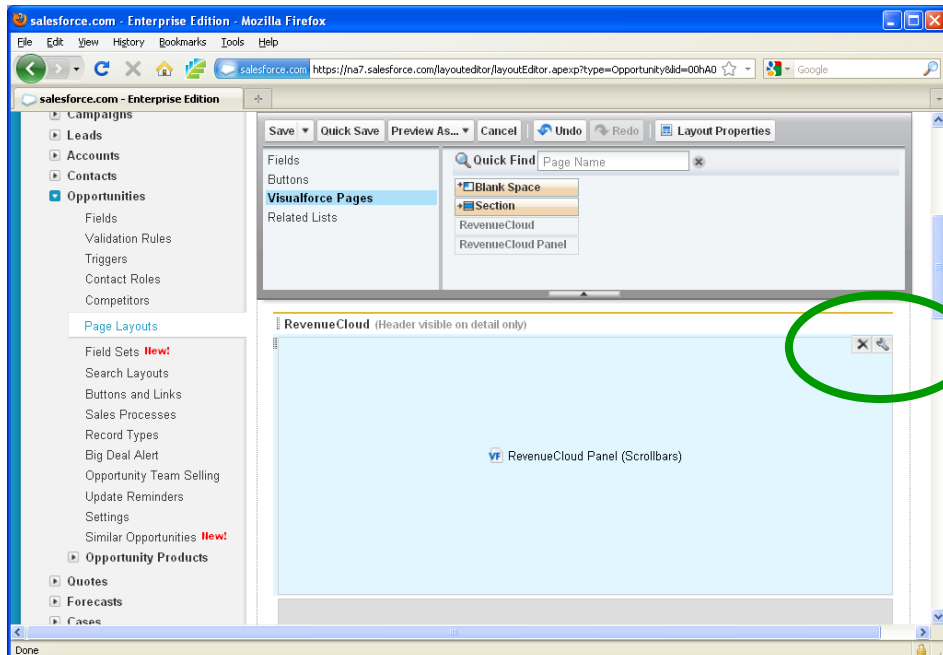
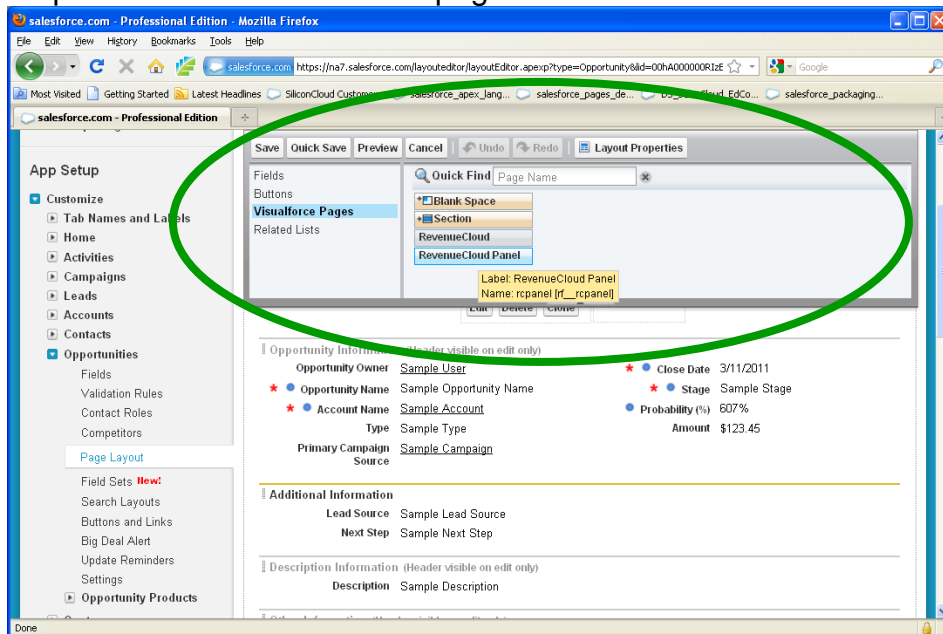
Navigate to your Opportunity Page Layout:

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.



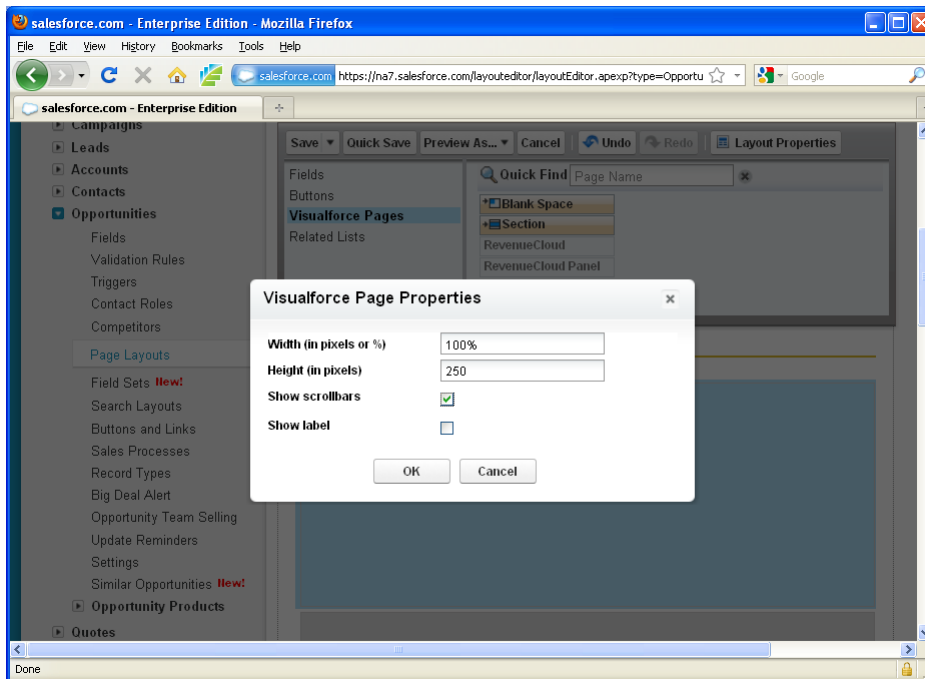
5. Install RevenueCloud Panel – Drag “RevenueCloud Panel” to your page layout

Select VisualForce Pages and drag “RevenueCloud Panel” to your new section created in previous step. Click on the little wrench icon to set Properties for the VisualForce page: “RevenueCloud Panel”



6. Install RevenueCloud Panel – Configure VisualForce Page Properties

Accept the default of 100% width and set the height to 250 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

7. Assign Licenses (Important!)

Users must be provisioned with licenses in order to use the App or view RevenueCloud Forecast Data.

Navigate to Setup->View Installed Packages->RevenueCloud and click on “Manage Licenses”. Assign licenses to the users that you want have access to RevenueCloud.

The screenshot shows the Salesforce interface for the 'RevenueCloud (Managed)' package. The 'Manage Licenses' button is circled in green. The package details table is as follows:

Installed Package Detail	
Package Name	RevenueCloud
Language	English
Version Name	1.1
Namespace Prefix	rf
Publisher	Surfwriter, Inc.
Status	Trial
Expiration Date	1/19/2011
Description	Opportunity revenue splits and split rep commissions made easy!
Version Number	1.1
First Installed Version Number	1.1
Package Type	Managed
Allowed Licenses	5
Used Licenses	2
API Access	Unrestricted [Enable Restrictions]
Modified By	Jotham FisherSmith, 12/31/2010 7:36 AM

Quick Start – Create a Revenue Forecast for an Opportunity



Tip: Be sure you've selected the RevenueCloud App from the Force.com App Menu in the upper right hand corner of Salesforce.com.

8. Quick Start – Select an Opportunity

On the RevenueCloud tab, enter a few letters of your Opportunity name, click "Go" and then click on your Opportunity in the search results to select (or alternatively, from within an Opportunity, you may click the "RevenueCloud" button to open RevenueCloud at Step 2 with the Opportunity already selected).

salesforce.com - Developer Edition - Mozilla Firefox

force.com <https://rf.na3.visual.force.com/apex/revenuecloud?sfdc.tabName=01r5000c>

RevenueCloud

Jotham Fisher-Smith Help RevenueCloud

Home Leads Accounts Contacts Opportunities Reports Dashboards Products RevenueCloud

Surfwriter
RevenueCloud - Select an Opportunity

Step 1 - Select Opportunity

Select Opportunity (keyword search)

Name	Stage	Amount	Close Date
Apple Stores - iPad Promotion	Closed Won	\$642,000.00	11/12/2008

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Find: Match case

Done

9. Quick Start - Configure Splits

Once an Opportunity is selected, it will be listed in the top of the RevenueCloud page, and “Step 2 – Configure Splits” will be visible. Click “New”. The first Revenue Split will be automatically populated with the Opportunity Owner as the Rep, and the split percentage will be set to 100%. If you don’t wish to split the revenue for this Opportunity between multiple Reps, simply click “Save”. Alternatively, if you wish to split the Opportunity revenue between multiple Reps, then you can click “New” again to add additional Revenue Splits. You may distribute the Split Percentages however you like, but the total of the percentages must always equal 100% in order to save your Revenue Splits. You may also add (optional) commission percentages to the splits if you wish to calculate Commissions for each Revenue Split.

The screenshot shows the Salesforce RevenueCloud interface in a Mozilla Firefox browser window. The page title is "RevenueCloud - Apple Stores - iPad Promotion". The navigation bar includes "Home", "Leads", "Accounts", "Contacts", "Opportunities", "Reports", "Dashboards", "Products", and "RevenueCloud". The "RevenueCloud" menu item is circled in green. Below the navigation bar, the page displays "Step 1 - Select Opportunity" and "Step 2 - Configure Splits". The "Step 2 - Configure Splits" section shows "OK - Revenue Splits: 2 Total: 100%". There are "New" and "Edit" buttons. A table lists the splits:

Split	Rep	Percentage	Commission	
Apple Stores - iPad Promotion - Jotham Fisher-Smith	Jotham Fisher-Smith	60%	3.50%	X
Apple Stores - iPad Promotion - Lloyd Braun	Lloyd Braun	40%	3.50%	X
		Total	100%	

The table and the "New" button are circled in green. The browser's search bar at the bottom shows "Find:" and "Done".

10. Quick Start - Generate Forecast

Once one or more Revenue Splits have been created for your Opportunity in Step 2, "Step 3 – Generate Forecast" will now be visible on the page and will already be completed by RevenueCloud Automation. If automation has been disabled (see RevenueCloud Automation), click the "Generate" button to refresh the RevenueCloud Forecast Data.

Step 1 - Select Opportunity

OK - Opportunity selected: [Adobe - 10,000 Impressions](#)

Select Opportunity (keyword search)

Step 2 - Configure Splits

OK - Revenue Splits: 2 Total: 100%

Split	Rep	Percentage	Commission
Adobe - 10,000 Impressions - Jotham Fisher-Smith	Jotham Fisher-Smith	80%	5.00% <input checked="" type="checkbox"/>
Adobe - 10,000 Impressions - Lloyd Braun	Lloyd Braun	40%	5.00% <input checked="" type="checkbox"/>
Total		100%	<input checked="" type="checkbox"/>

Step 3 - Generate Forecast

Forecast Status: OK - RevenueCloud Forecast Data is Current for this Opportunity

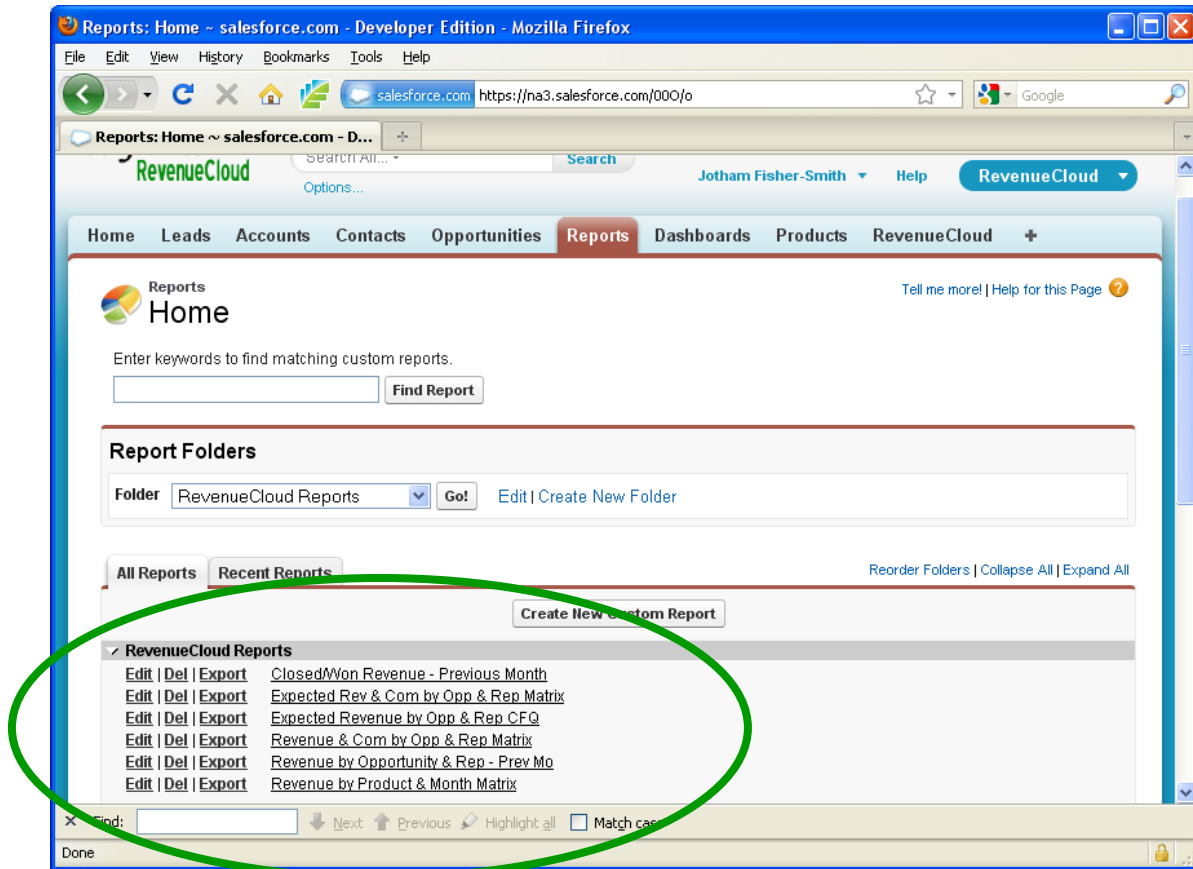
RevenueCloud Mode: Auto

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That's it! Your revenue forecast with Splits and Commissions has now been generated. You can now navigate to one of the RevenueCloud Reports to view or download your data to Excel (next screen shot).

Viewing RevenueCloud Reports & Forecast Data

To view your new revenue forecast, navigate to the Reports Tab and view one of the monthly matrix reports included in the reports folder “RevenueCloud Reports”.



Viewing RevenueCloud Reports & Forecast Data (cont.)



Tip: This Example Opportunity contains Salesforce.com Quantity and Revenue Schedules. This is a standard feature in Salesforce.com that creates payment and delivery cycles for products. RevenueCloud may be used to calculate splits and commissions on any of your Opportunities (with or without Products or Schedules), however if you desire a monthly revenue forecast for a given Opportunity (as displayed below) you should add products and schedules to the Opportunity and then use RevenueCloud to calculate your splits and commissions. For more information on using products and schedules, see Salesforce.com help.

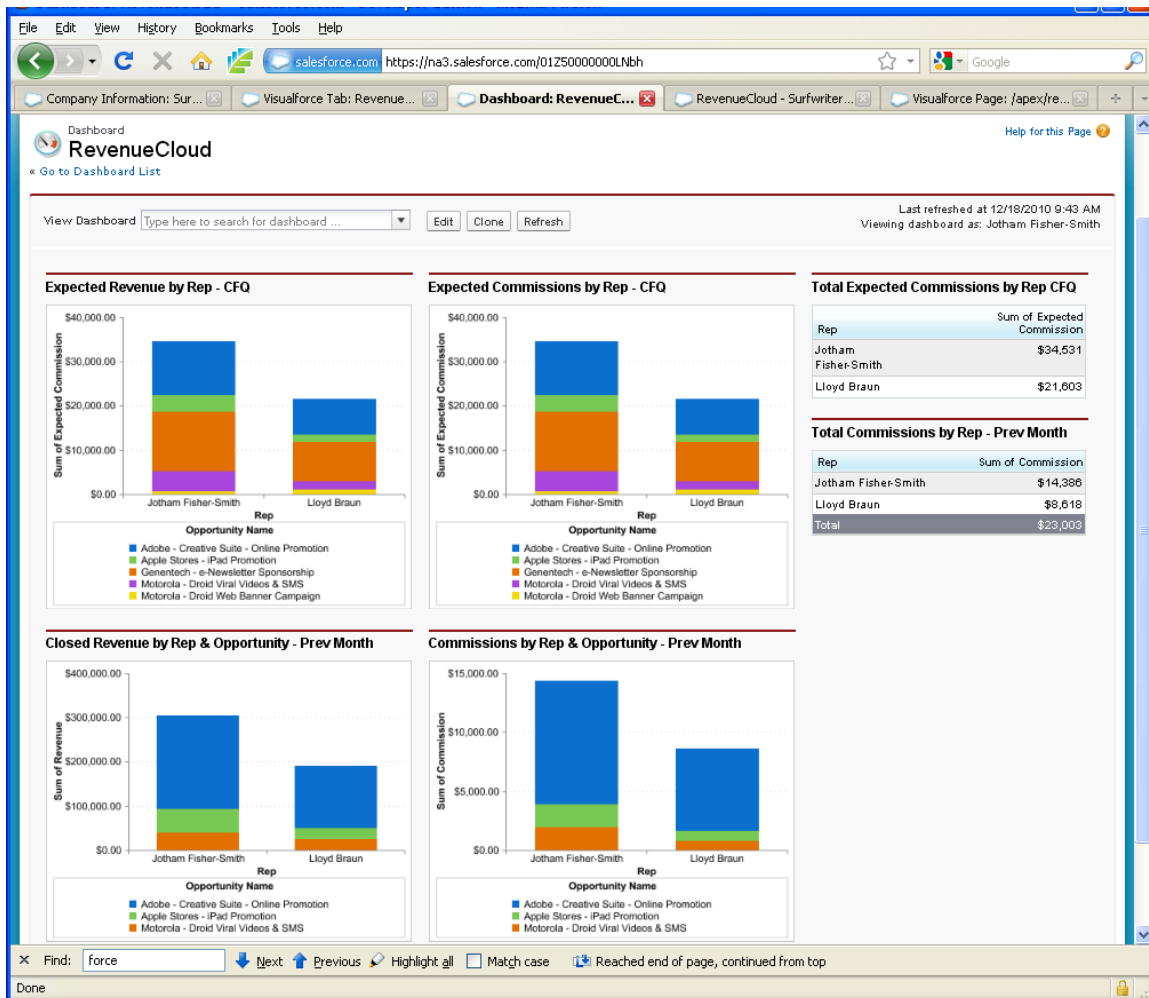
The report below displays our new RevenueCloud Forecast with Revenue Splits and Commissions applied. Note that the Monthly Revenue and Commissions for the Opportunity are now broken out and assigned to separate Reps.

RevenueCloud has generated an entirely new and separate set of forecast data in the cloud within the Salesforce org. The RevenueCloud Forecast and Commissions data will remain unchanged regardless of changes made to the Opportunity until either the Revenue Splits are edited or the the Forecast is updated for this Opportunity by clicking the "Generate" button in RevenueCloud with this Opportunity selected .

Opportunity Name	Rep	Sum of Quantity	Sum of Revenue	Sum of Commission	November 2010	December 2010	January 2011	February 2011	March 2011	April 2011	May 2011	June 2011	July 2011	August 2011	September 2011	October 2011	Grand Total	
Apple Stores - iPad Promotion	Jotham Fisher-Smith	72.10	\$55,300.00	\$1,935.50	72.10	\$55,300.00	\$1,935.50	72.10	\$55,300.00	\$1,935.50	72.10	\$55,300.00	\$1,935.50	70.70	\$19,600.00	\$686.00	70.70	\$556.80
	Lloyd Braun	30.90	\$23,700.00	\$829.50	30.90	\$23,700.00	\$829.50	30.90	\$23,700.00	\$829.50	30.30	\$8,400.00	\$294.00	30.30	\$8,400.00	\$294.00	30.30	\$367.20
	Sub Total	103.00	\$79,000.00	\$2,765.00	103.00	\$79,000.00	\$2,765.00	103.00	\$79,000.00	\$2,765.00	103.00	\$79,000.00	\$2,765.00	101.00	\$26,000.00	\$900.00	101.00	\$1,224.00
Grand Total		103.00	\$79,000.00	\$2,765.00	103.00	\$79,000.00	\$2,765.00	103.00	\$79,000.00	\$2,765.00	103.00	\$79,000.00	\$2,765.00	101.00	\$26,000.00	\$900.00	101.00	\$1,224.00

RevenueCloud Dashboard

The RevenueCloud Dashboard displays Expected* Split Revenue and Commissions for the Current Fiscal Quarter (*weighted according to Opportunity probability) and Closed Revenue and Commissions for the Previous Month. This 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 revenue visibility, sharing and security requirements of your organization.



RevenueCloud Automation

RevenueCloud includes seamless Automation to enable all RevenueCloud Forecast Data to be maintained without any extra clicks by your Sales Team.

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

With RevenueCloud Automation, the “Generate Forecast” button will generally not be visible as your RevenueCloud Forecast data will be updated automatically as you make changes. Your RevenueCloud Forecast data will be maintained automatically and your reports will always be up to date according to all the latest changes to Opportunities (and line items and schedules if you use them).

Advanced Administration: RevenueCloud Automation may be disabled in the Custom Settings of your Salesforce.com Org. This enables your Salesforce Administrator to turn off RevenueCloud Automation for specific Users and / or Profiles which may be performing data loading or other resource-intensive tasks.

11. Navigate to RevenueCloud Custom Settings

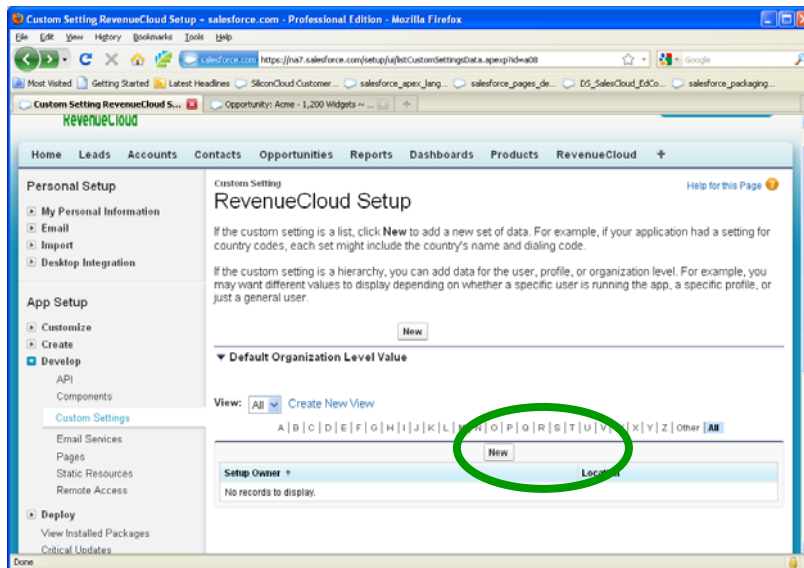
Navigate to: Setup->Develop->Custom Settings->RevenueCloud Setup, Click “Manage”.

The screenshot shows the Salesforce Custom Settings page for RevenueCloud. The left sidebar contains navigation menus for Personal Setup, App Setup, and Deploy. The main content area shows a table of custom settings. A green circle highlights the 'Manage' link for the 'RevenueCloud Setup' custom setting.

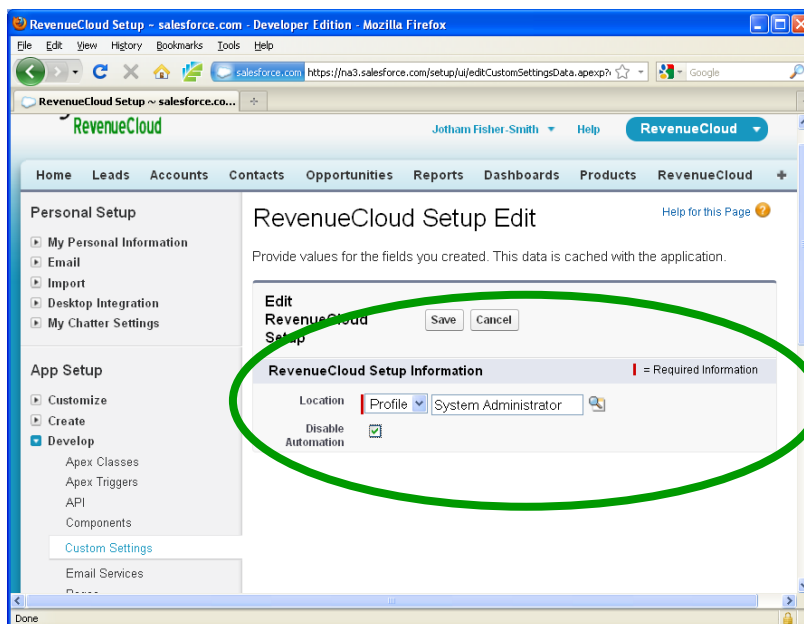
Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	RevenueCloud Setup	Public	Hierarchy	rf		110	0	0

12. Automation – Disable Specific Users or Profiles (preferred)

To enable RevenueCloud Automation for specific users or profiles: Click on the lower “New” button in RevenueCloud Setup.



Now you may browse to a specific User or Profile, select “Disable Automation” and click “Save” as needed.



13. Automation - Set Org Default

To quickly disable Automation 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”.

