Revenue Cloud

SALESFORCE REVENUE CLOUD

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A US-based SaaS company managing recurring subscriptions was struggling with manual billing, revenue leakage, and compliance challenges. Their sales team was already using Salesforce, but revenue operations were split across spreadsheets and disconnected tools.

CHALLENGES

- Frequent billing errors (20%+ correction rate).
- Delays in invoicing and revenue recognition.
- No automation for contract renewals or amendments.
- Difficulty scaling subscription and usage-based pricing models.
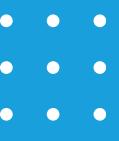
DRIVE REVENUE GROWTH ON THE #1 AI CRM FOR SALES.

Agentforce

Revenue Cloud

Catalog	CPQ	Contracts
Orders	Assets	Billing

Subscription & Consumption

Direct Sales | Channel Sales | In-Product | E-Commerce

Salesforce Platform

MY APPROACH
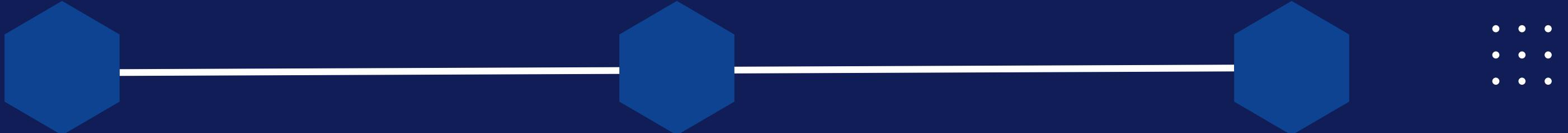
- **Audit & Strategy:** Reviewed existing revenue processes and identified gaps between Sales, Finance, and Operations.
- **Configuration & Optimization:** Implemented Salesforce Revenue Cloud (CPQ + Billing), including product catalog setup, pricing rules, and subscription models.
- **Revenue Recognition:** Automated RevRec schedules aligned with ASC 606 standards.
- **Integrations:** Connected Salesforce Billing with NetSuite for seamless financial reporting.
- **Automation & Reporting:** Built workflows for contract renewals, approvals, and designed real-time dashboards for Finance.

CONFIGURE, PRICE AND QUOTE FROM ANYWHERE.
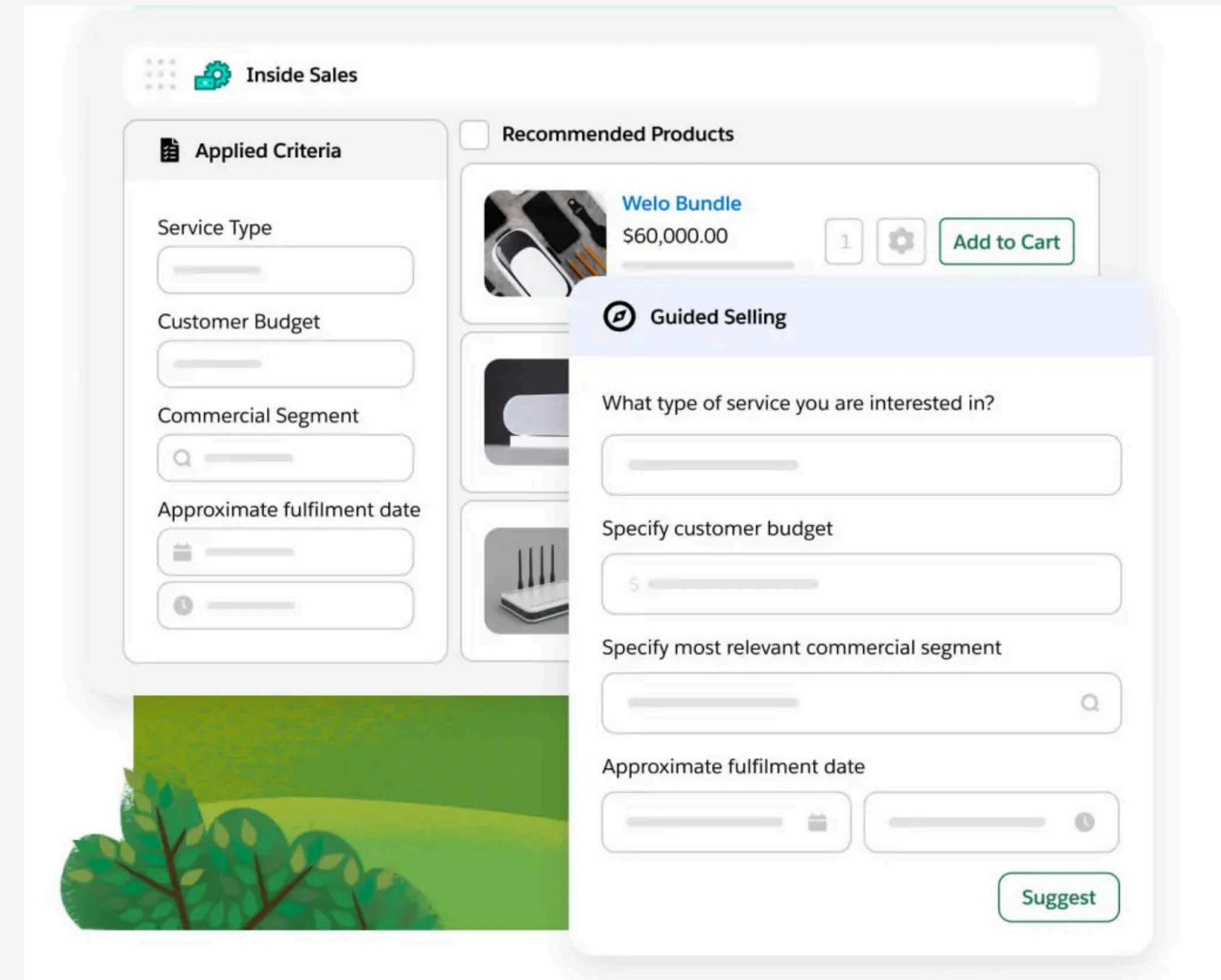
MANAGE THE ENTIRE CONTRACT LIFECYCLE ON CRM.
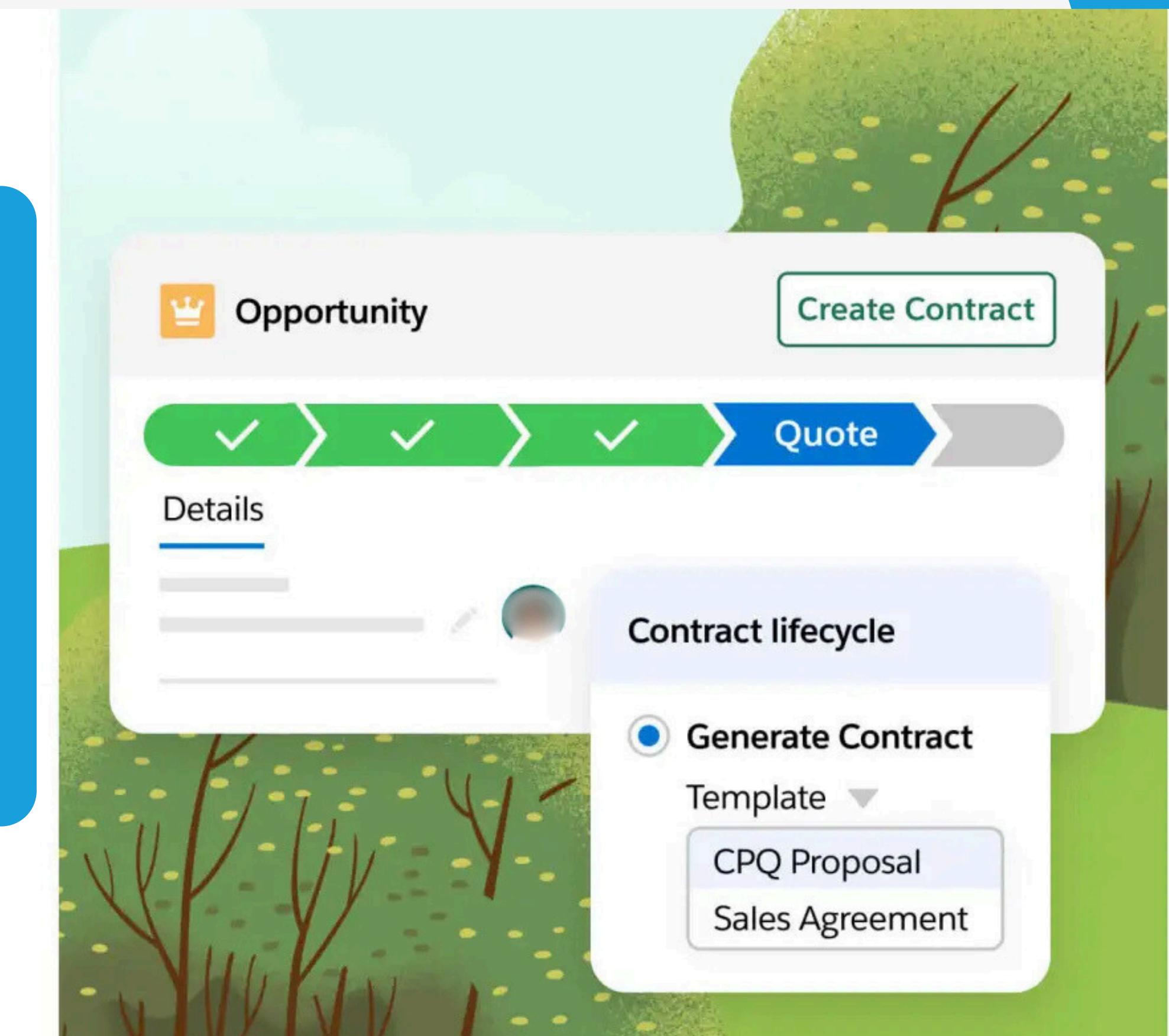
ORCHESTRATE THE PERFECT ORDER.
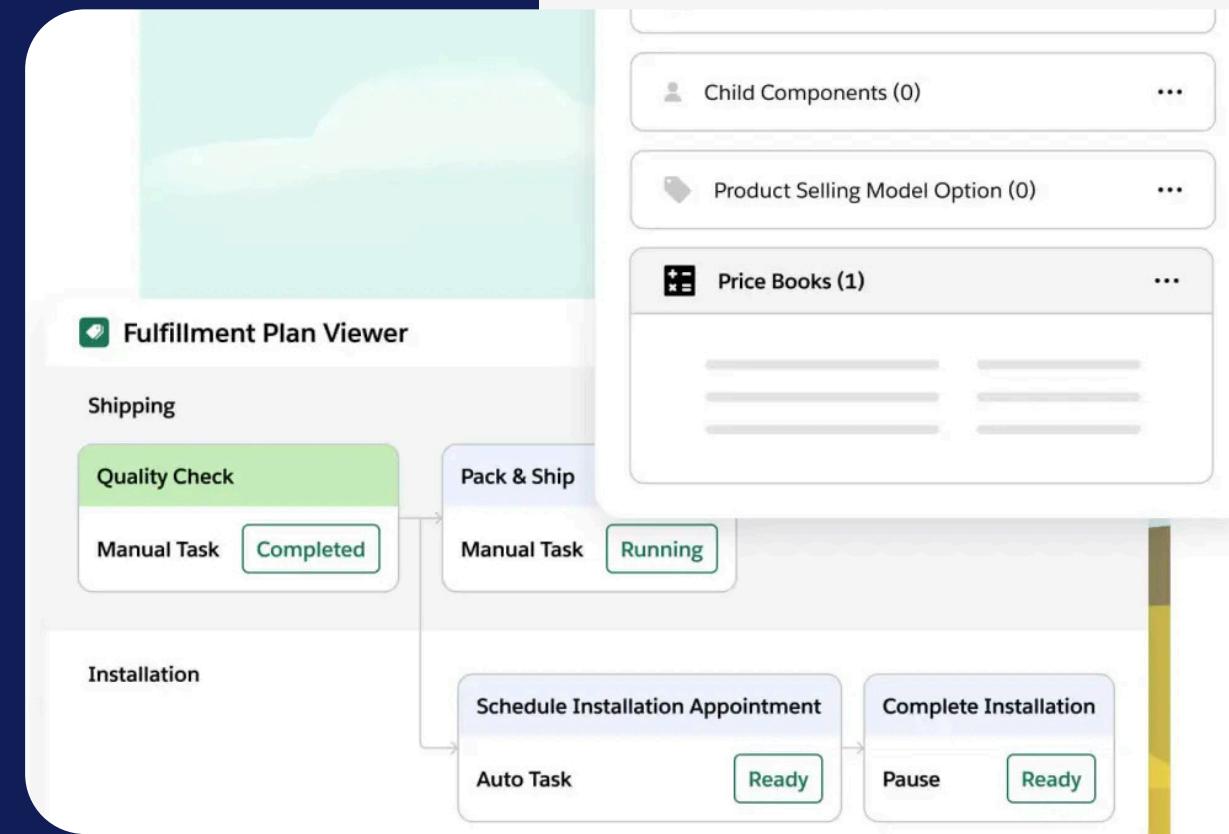
Order Automation
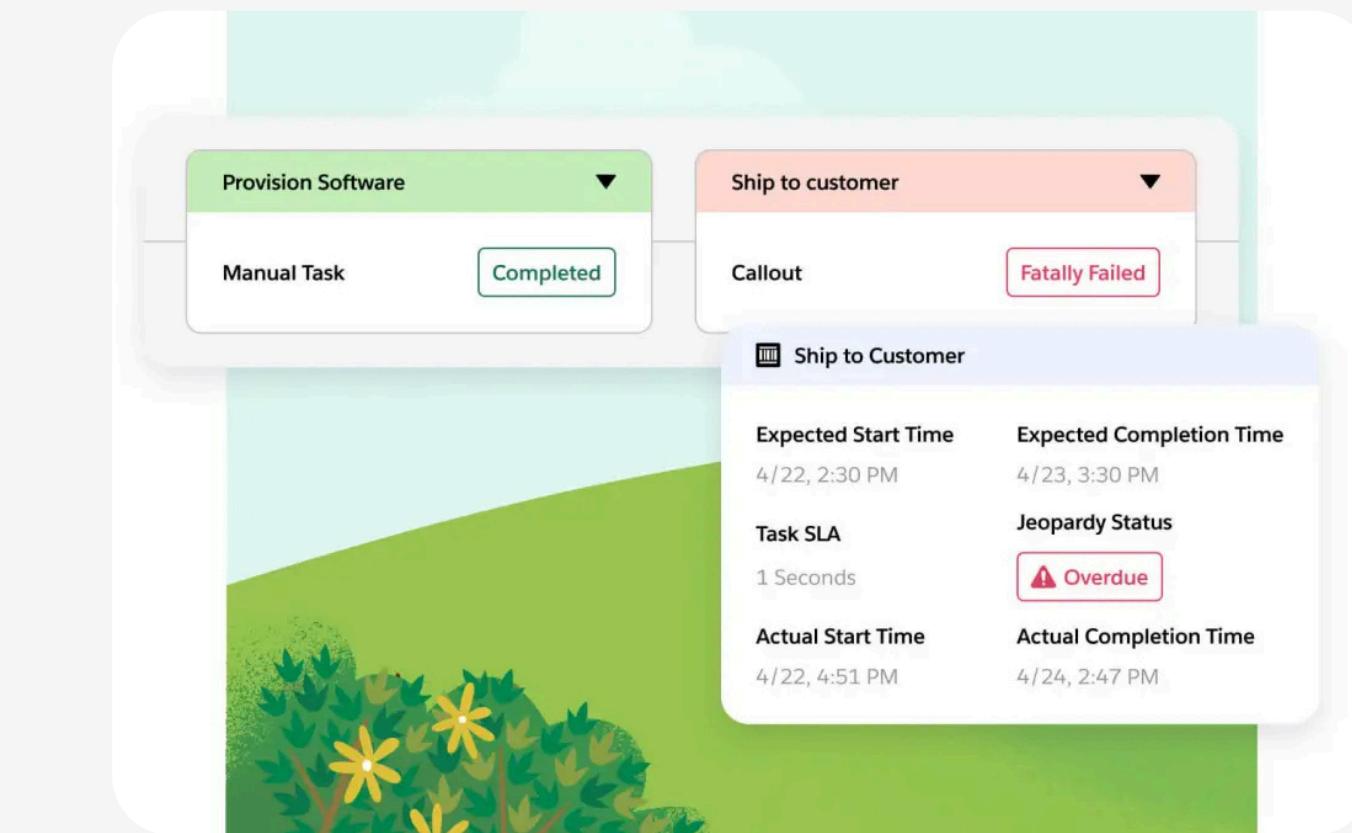
Reduced Order Fallout
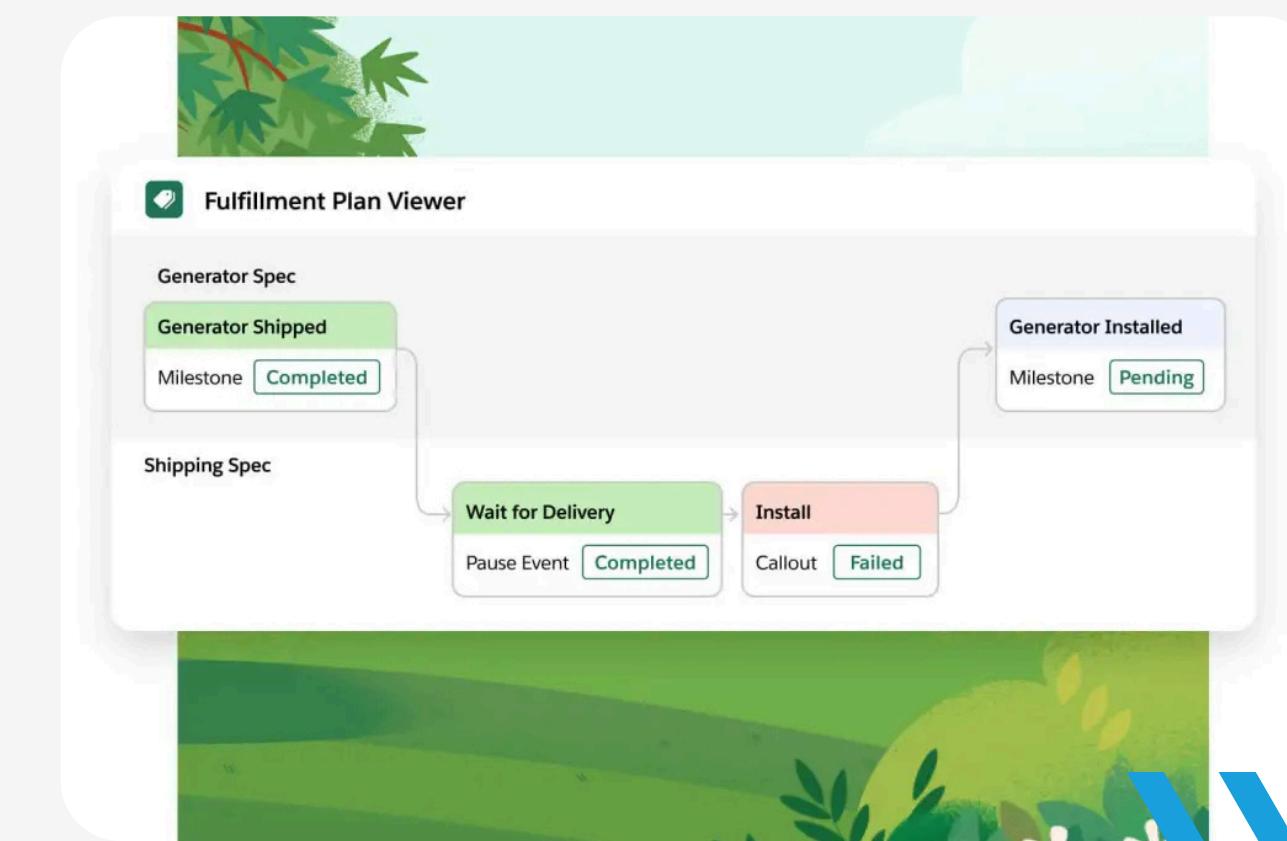
Downstream Process Initiation

INVOICE, PAY AND COLLECT FOR EVERY CHARGE MODEL.

1. Invoice Automation and On-Time Delivery
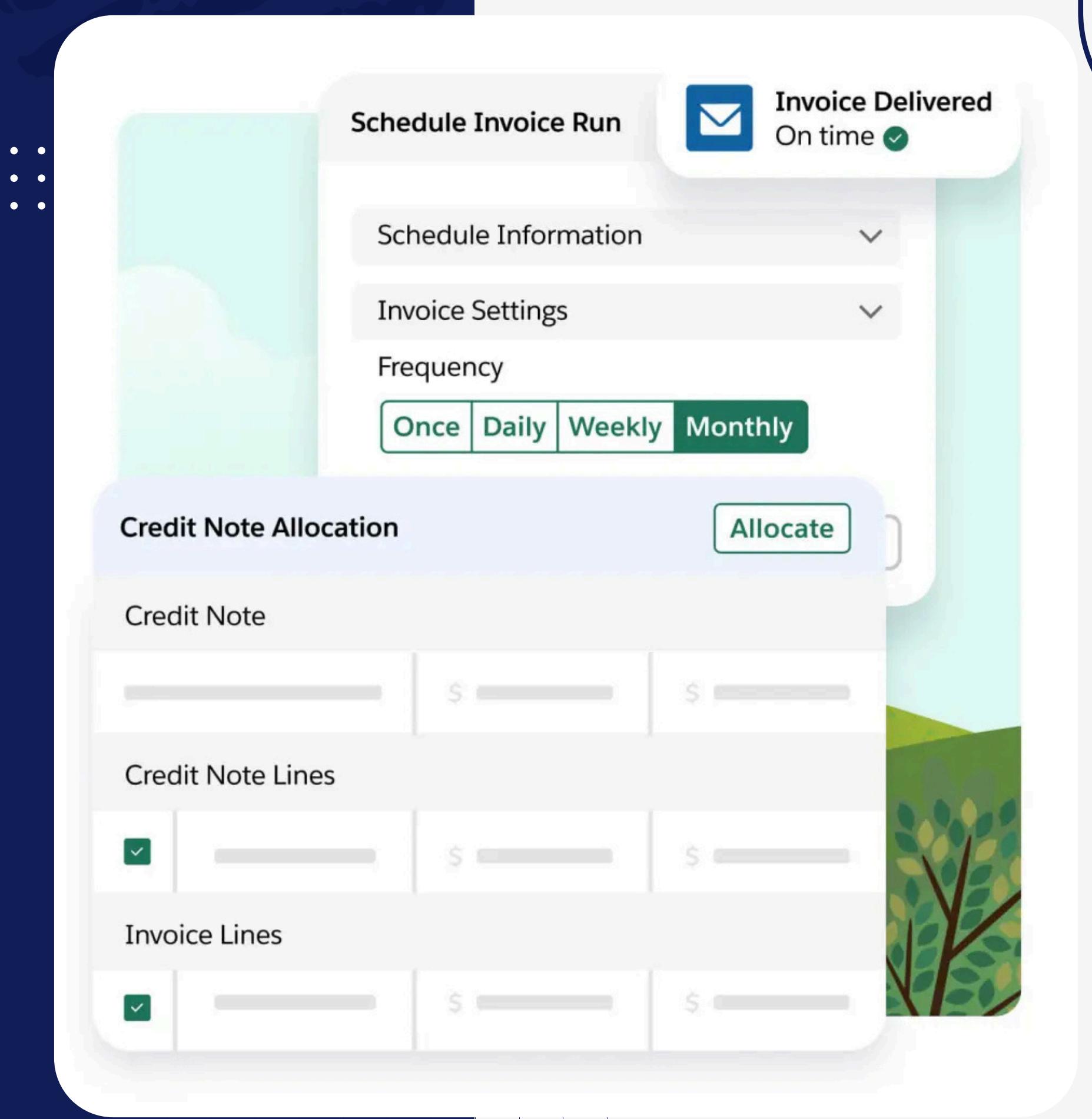
INVOICE, PAY AND COLLECT FOR EVERY CHARGE MODEL.

2. Usage-Based Billing

Price by usage

Tier Pricing

Tier Name	Adjustment Type ⌄
Tier 1	Amount Surcharge
Tier 2	Override
Tier 3	Percentage Discount

Overview

Total Accounts	Total Usage Products
24	13

Accounts with Overage	Accounts with low drawdown balance
20	2

Consumption Metrics

● Compute Hours ● DB Storage ● File Storage
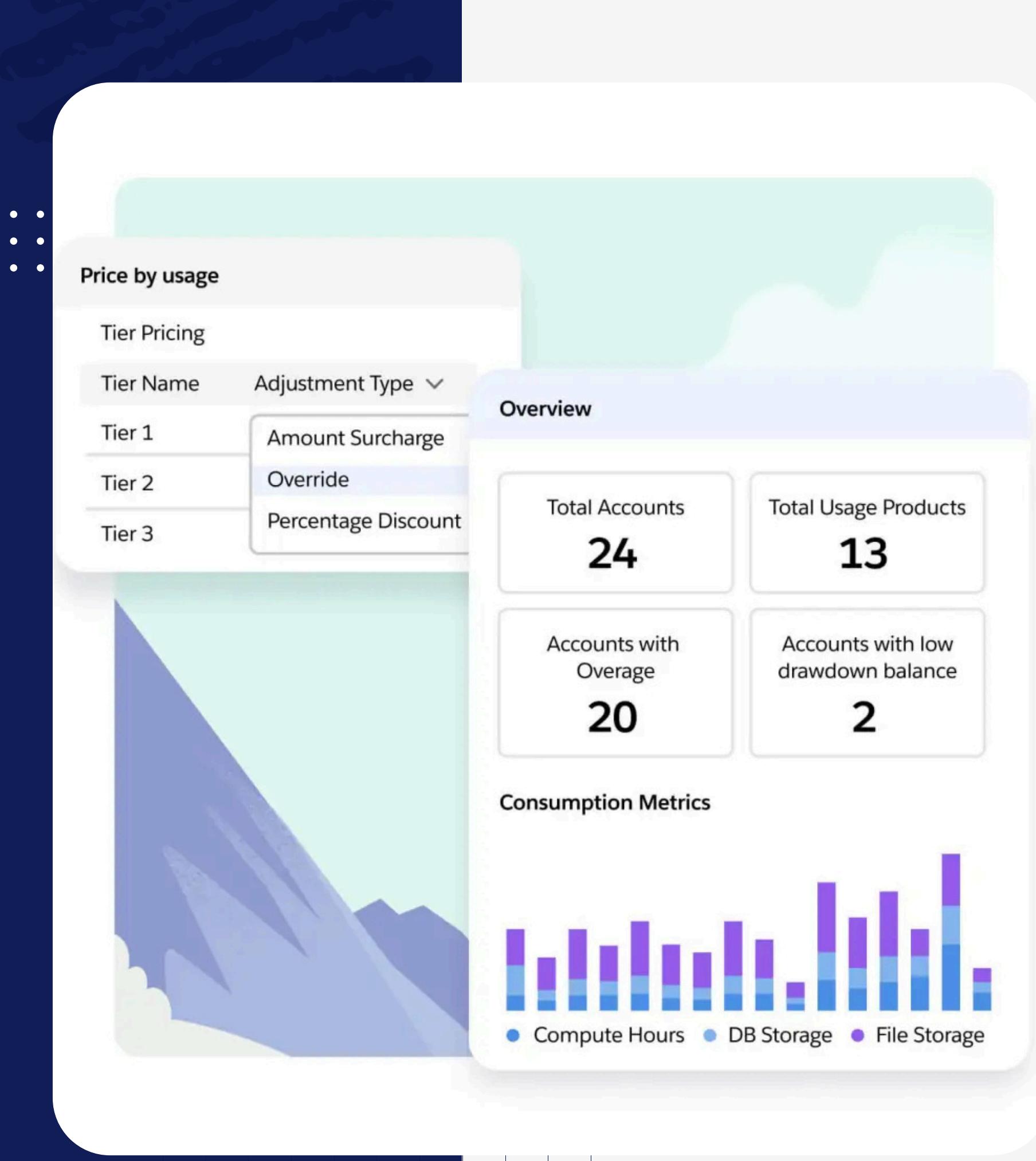
INVOICE, PAY AND COLLECT FOR EVERY CHARGE MODEL.

3. Fast Payment Collection

Revenue Cloud

Actions

Search for an action or flow

Bill Now | Manage Payment Method | Generate Payment Link

Billing Account Details

Billing Account Type	Billing Account Status	Billing Frequency	Payment Method
Individual	Active	Monthly	

Last Payment Details

Date	Amount
2/27	$100.00

Payment Received
...id $100 Online Credit Card
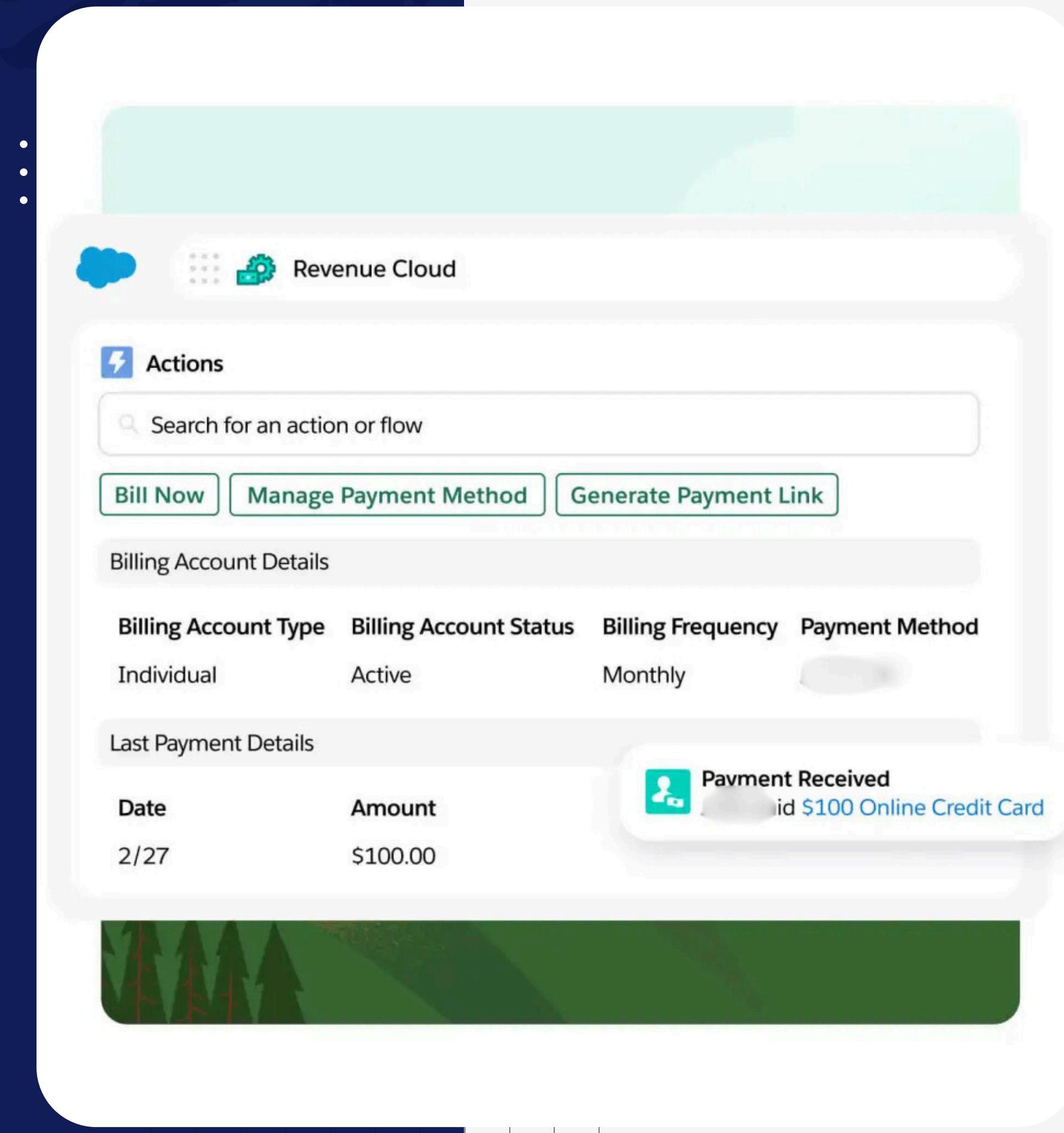
RESULTS

- 75% fewer billing errors through automation.
- 40% faster revenue recognition, ensuring ASC 606 compliance.
- 50% reduction in reporting time, giving leadership real-time visibility.
- Enabled Finance team to handle 2x growth in accounts without additional headcount.

KEY SALESFORCE FEATURES USED

- Revenue Cloud (CPQ + Billing)
- ASC 606 Revenue Recognition
- Automated Flows for renewals and approvals
- ERP Integration (NetSuite)
- Dashboards & Custom Reporting