

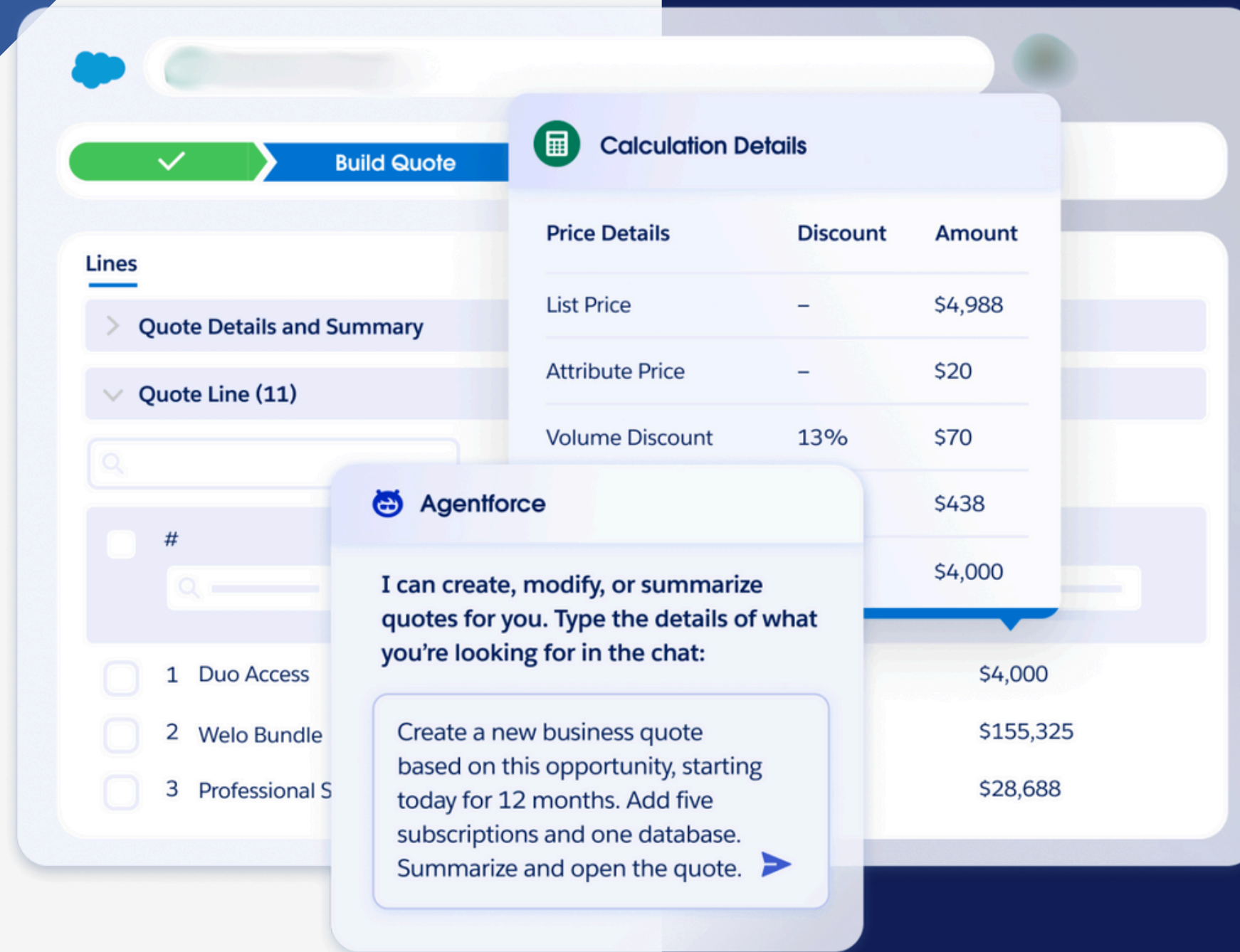
salesforce

Revenue Cloud

SALESFORCE REVENUE CLOUD




SALESFORCE REVENUE CLOUD

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.

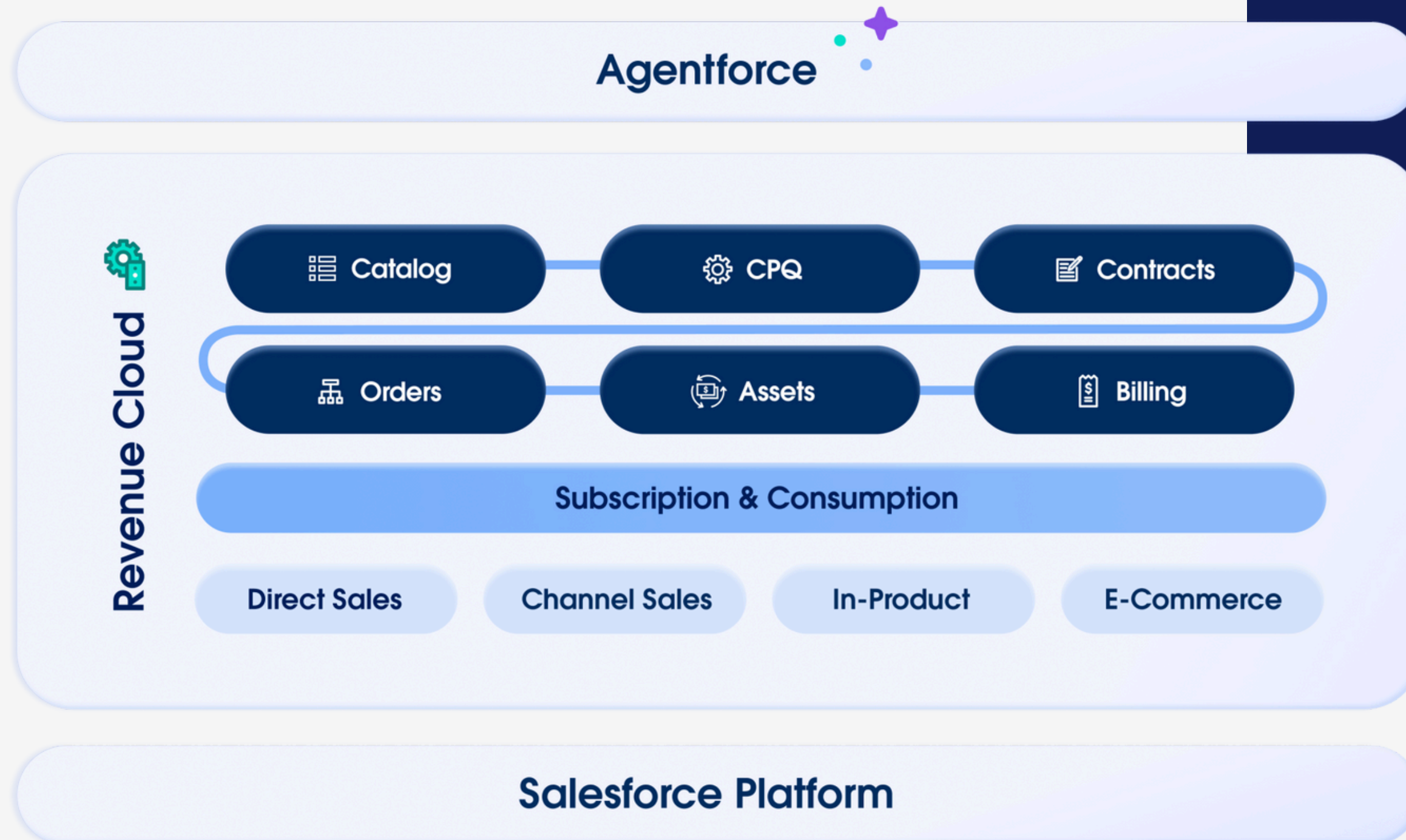




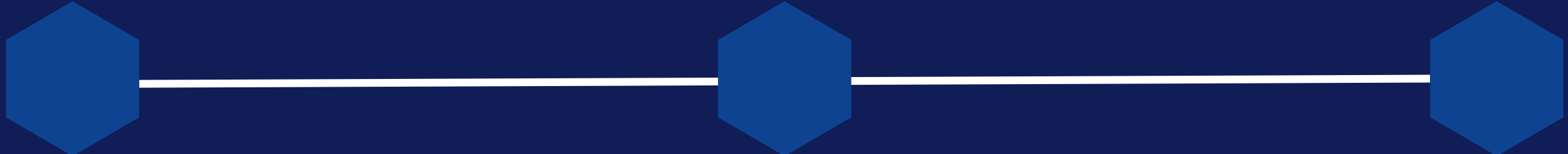

CHALLENGES

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- 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.
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DRIVE REVENUE GROWTH ON THE #1 AI CRM FOR SALES.



MY APPROACH

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- **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.

Inside Sales

Applied Criteria


Service Type

Customer Budget

Commercial Segment


Approximate fulfilment date


Recommended Products

Welo Bundle
\$60,000.00

1

Add to Cart





Guided Selling

What type of service you are interested in?

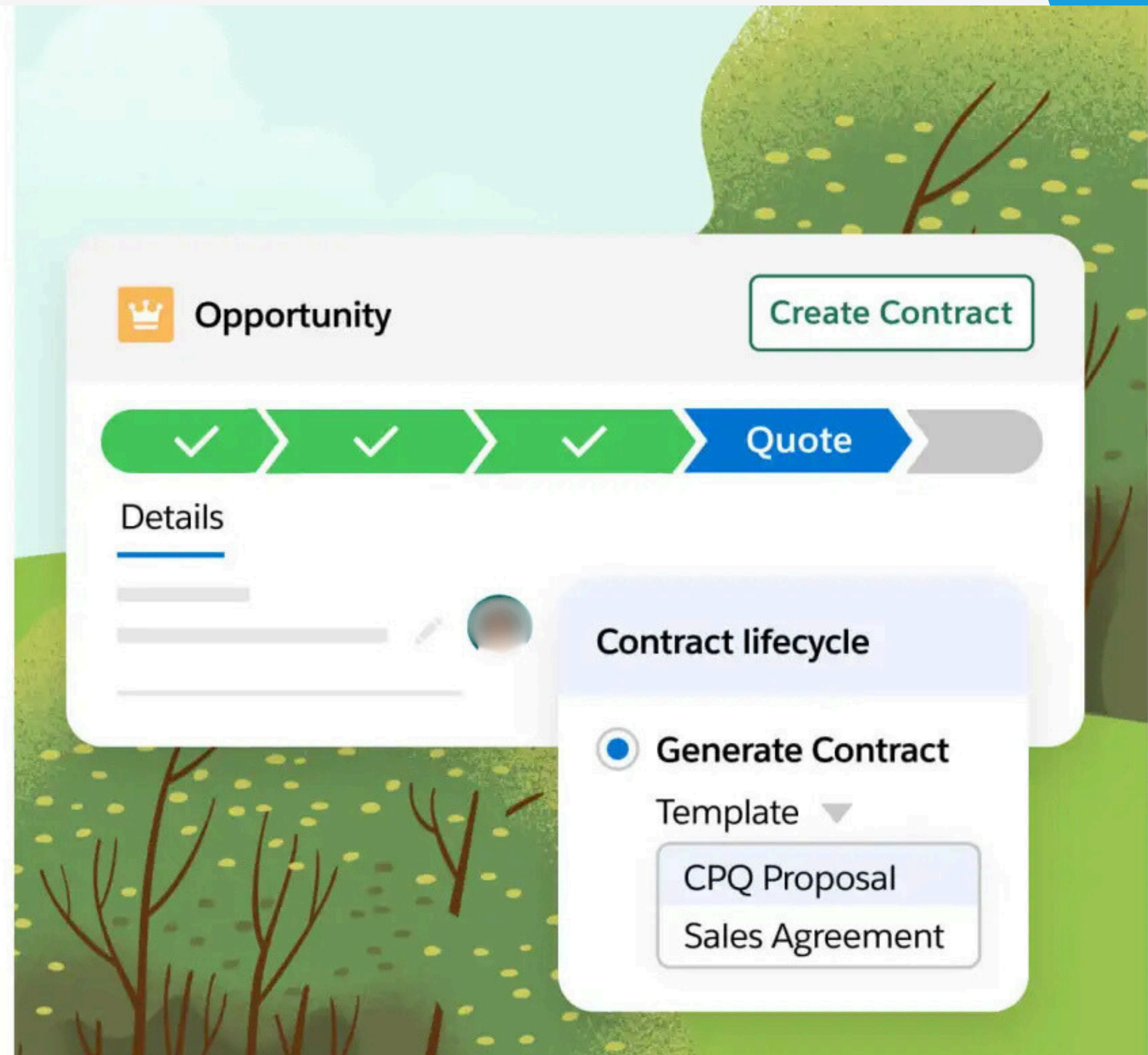
Specify customer budget

Specify most relevant commercial segment

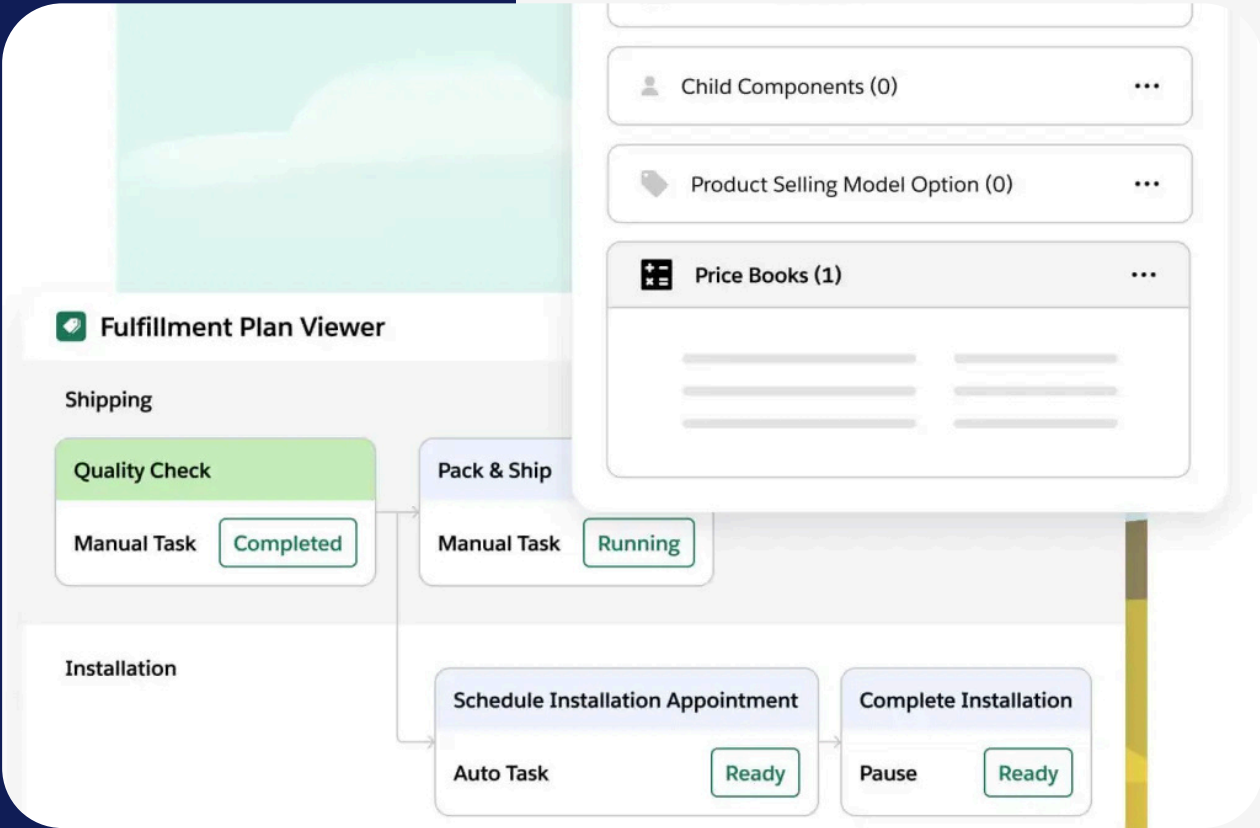
Approximate fulfilment date

Suggest

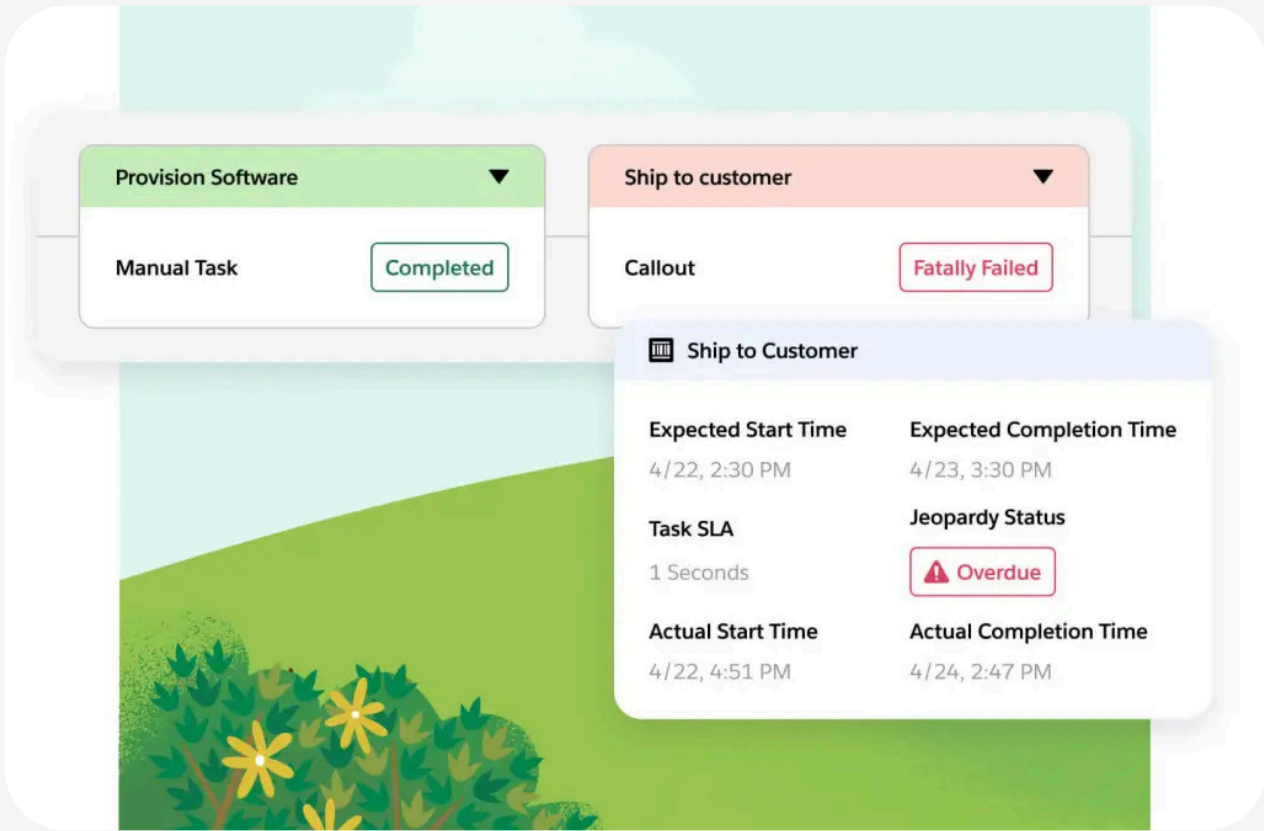
MANAGE THE ENTIRE CONTRACT LIFECYCLE ON CRM.



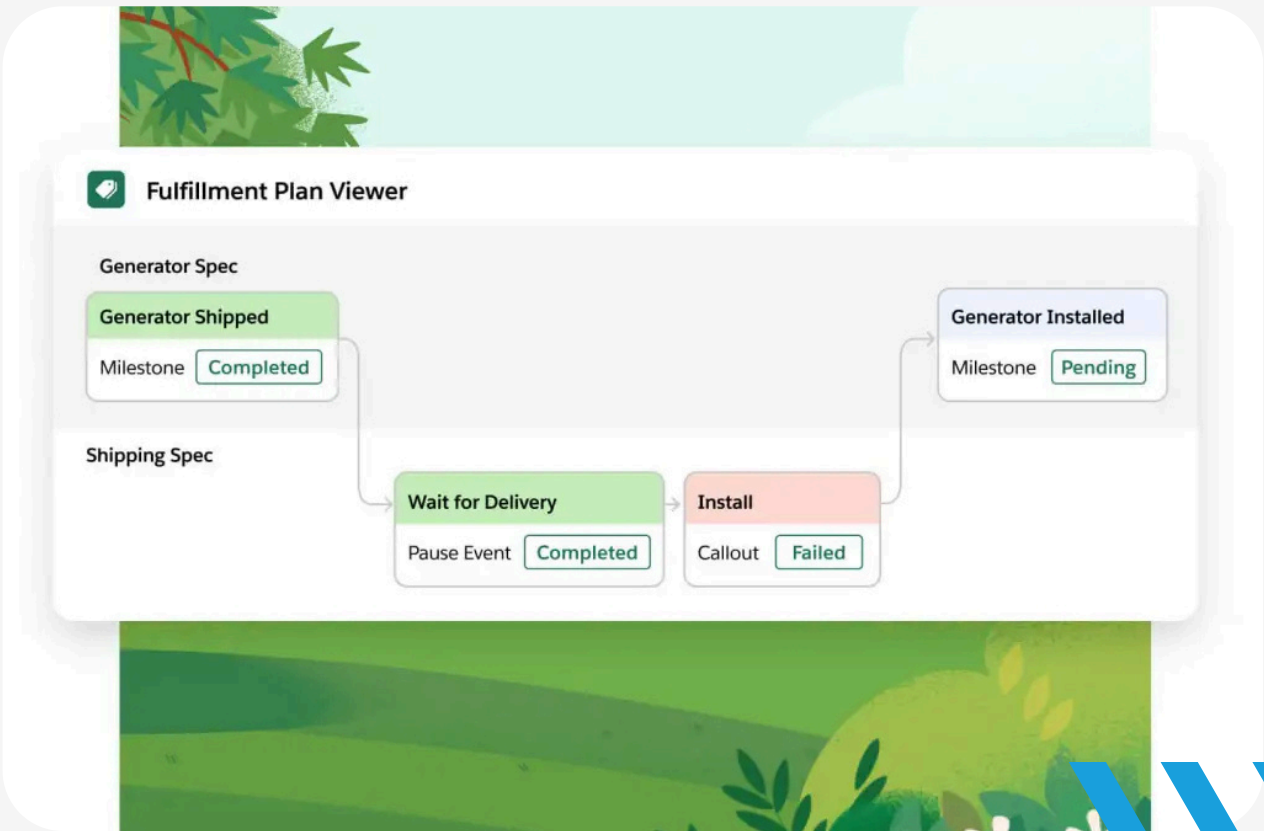
ORCHESTRATE THE PERFECT ORDER.



Order Automation



Reduced Order Fallout



Downstream
Process Initiation

INVOICE, PAY AND COLLECT FOR EVERY CHARGE MODEL.

1. Invoice Automation and On-Time Delivery

The screenshot displays a software interface for managing invoices. At the top right, a status bar shows an envelope icon and the text "Invoice Delivered On time" with a green checkmark. Below this, a "Schedule Invoice Run" section contains a "Schedule Information" dropdown, an "Invoice Settings" dropdown, and a "Frequency" section with four buttons: "Once", "Daily", "Weekly", and "Monthly". The "Monthly" button is highlighted in green. Below the frequency buttons is a "Credit Note Allocation" section with an "Allocate" button. Underneath, there are three sections: "Credit Note" with a single row of input fields, "Credit Note Lines" with a table containing one checked row, and "Invoice Lines" with a table containing one checked row. Each row in the tables has four input fields, with the first field containing a green checkmark.

Schedule Invoice Run

Invoice Delivered On time ✓

Schedule Information

Invoice Settings

Frequency

Once Daily Weekly Monthly

Credit Note Allocation

Allocate

Credit Note

		\$		\$	
--	--	----	--	----	--

Credit Note Lines

✓		\$		\$	
---	--	----	--	----	--

Invoice Lines

✓		\$		\$	
---	--	----	--	----	--

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

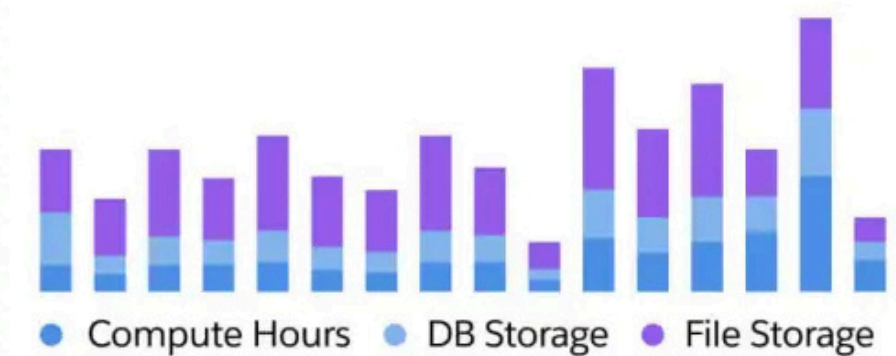
Total Accounts
24

Total Usage Products
13

Accounts with
Overage
20

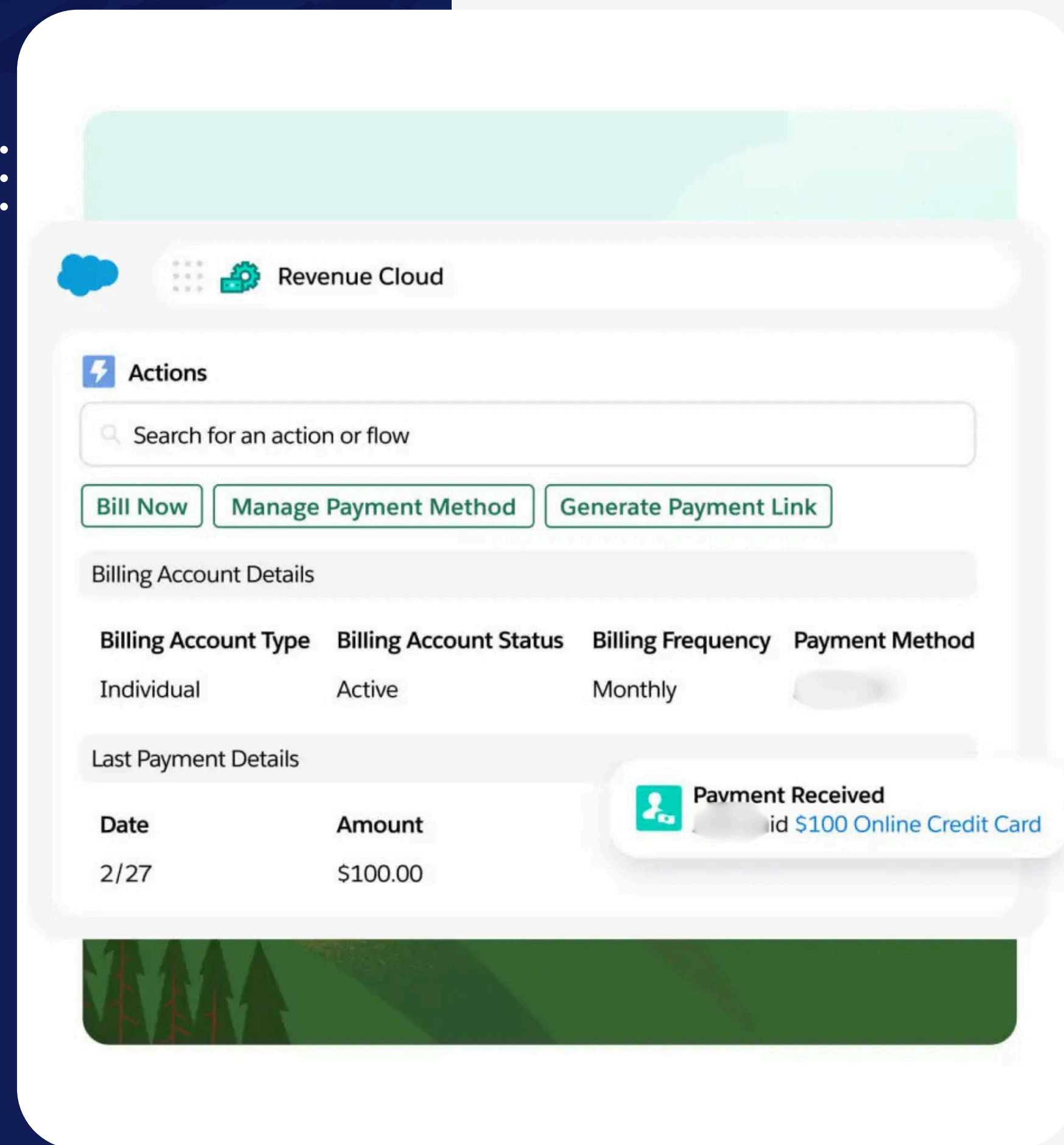
Accounts with low
drawdown balance
2

Consumption Metrics



INVOICE, PAY AND COLLECT FOR EVERY CHARGE MODEL.

3. Fast Payment Collection



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.

The Salesforce logo, featuring the word "salesforce" in a white, lowercase, sans-serif font inside a light blue cloud shape. The background of the slide is dark blue with a subtle pattern of white dots and lines. In the top right corner, there are three horizontal white lines. In the bottom right corner, there is a grid of white dots.

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Revenue Cloud

KEY SALESFORCE FEATURES USED

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