Quota Retirement Amount Runbook

Overview

Quota Retirement Amount (QRA) is the child object created to help automate the calculation of quota retirement for a won LTD deal. This info is stamped onto the Opportunity and then consumed by Clari for reporting purposes and compensation.

Scope

This runbook covers how Quota Retirement Amounts are created and calculated in Salesforce.

Background

SalesOps manages Sales OKR, pacing to goal, and quota retirement policies. This has been managed manually through reports and excel sheet to track what amount of new revenue counts towards quota retirement. The rules surrounding quota retirement are complex as it is different for each product category.

Process Objective

The QRA automation is attempting to achieve the following business goals:

- Calculate what amount of new incremental did a rep sell on a given deal and how much of quota did a rep retired on said deal
- Make the above information available on the Opportunity so it can be consumed by Clari

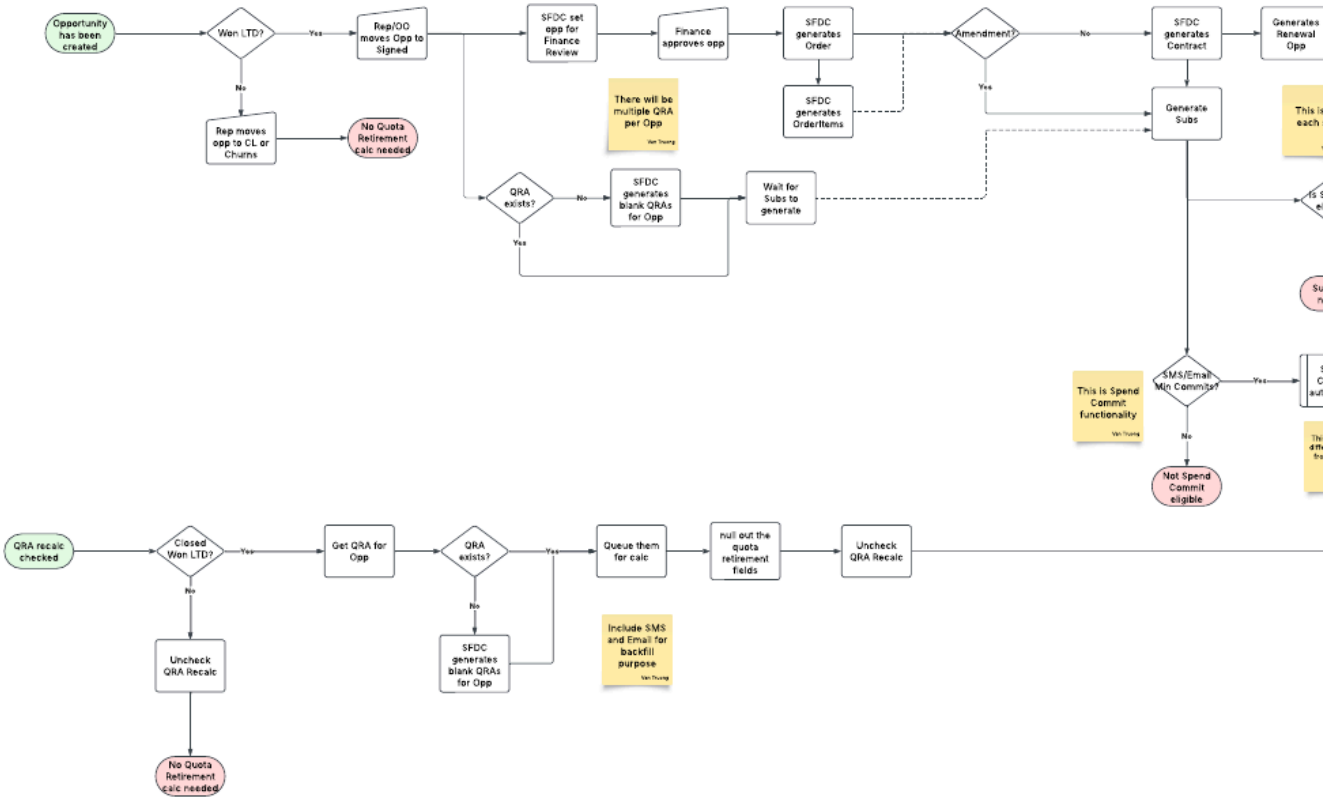
The QRA automation is designed to achieved the following technical goals:

- Enable data sourcing from different object types - Subscriptions and Spend Commitments
- Pace automation to avoid row lock errors and allow data to be populated before calculation
- Isolate automation logic from important objects/processes to avoid interruption of critical functions
  - Avoid blocking Opportunity closure
  - Avoid Subscription creation failure
  - Avoid Spend Commitment calculation failure

Process Description

- When an Opportunity goes Closed Won, and it is for a LTD deal, SFDC will generate blank QRA records that are un-queued.
  - There is a 2 minute delay for pacing purposes.
  - Only 6 QRA are generated per Opp.
  - Each QRA is for a specific product category.
  - QRA calculation/creation can be triggered using the `Recalculate Quota Retirement Amounts` field on the Opp.
- QRAs are queued when Subscriptions are created for QRA qualified products or when a Spend Commit is populated with data.
  - There is a 5 minute delay for pacing purposes
  - We look for an un-queued QRA for the corresponding QRA category that is on the opportunity that originally sold that product (Sub → QL → Quote → Opp).
    - We do a similar check on Spend Commitments, but we get the first Min Commit Sub and then do the same look up.
- After QRAs are queued, we wait 15 minutes to ensure all Subscriptions have been generated.
- QRA will calculate product category specific logic but generally:
  - We want to sanity check again if there is a contract associated to the QRA.
  - We check if the product was even sold on this Opp.
  - We check to see if the product is being renewed.
  - For QRAs that are unqualified, we will stamp some info why we unqualified them.
  - If we calculate a QRA, we will update the QRA with the amount and as qualified, and push that amount to the Opp that owns the QRA.
- Once QRA values flow into the Opp, we begin aggregating them.
- Clari will then pick up the data.

Process Visuals

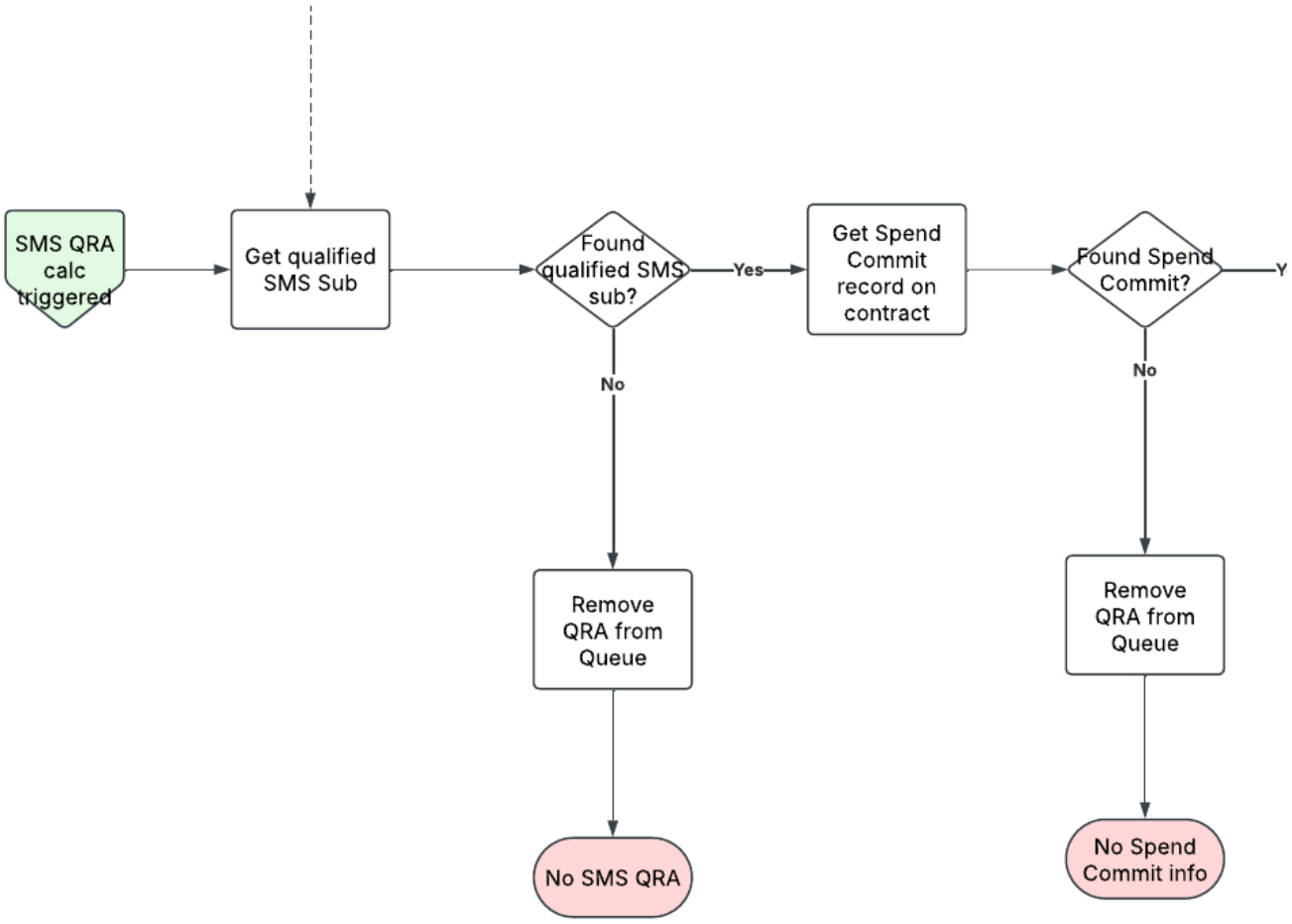

Opportunity has been created
Won LTD?
Yes
No
Rep/OO moves Opp to Signed
Rep moves opp to CL or Churns
No Quota Retirement calc needed
SFDC set opp for Finance Review
Finance approves opp
SFDC generates Order
SFDC generates OrderItems
There will be multiple QRA per Opp
Amendment?
No
Yes
SFDC generates Contract
Generates Renewal Opp
Generate Subs
QRA exists?
No
Yes
SFDC generates blank QRAs for Opp
Wait for Subs to generate
This is Spend Commit functionality
SMS/Email Min Commits?
Yes
No
Not Spend Commit eligible

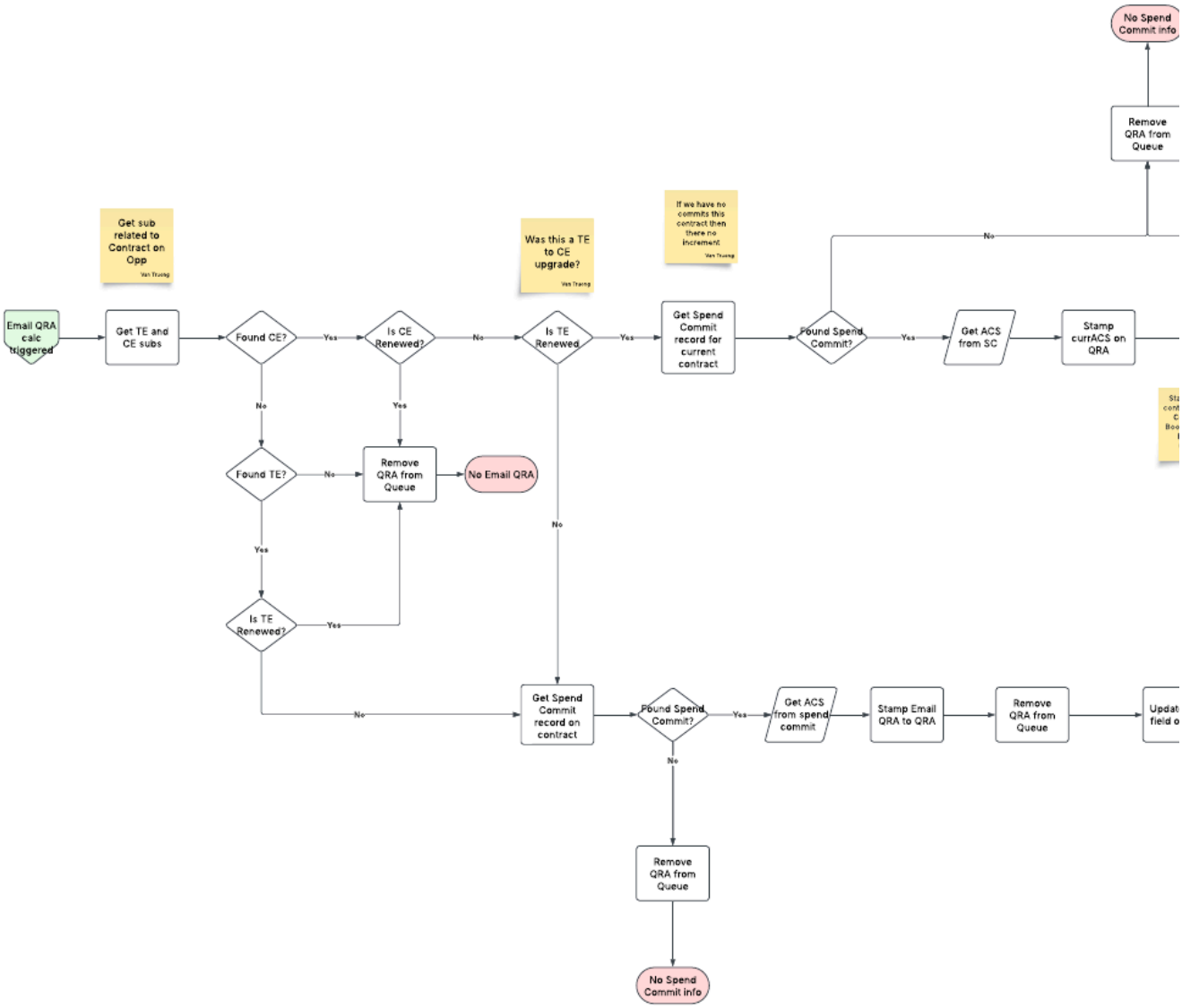
QRA recalc checked
Closed Won LTD?
Yes
No
Get QRA for Opp
QRA exists?
Yes
No
SFDC generates blank QRAs for Opp
Queue them for calc
null out the quota retirement fields
Uncheck QRA Recalc
Include SMS and Email for backfill purpose
Uncheck QRA Recalc
No Quota Retirement calc needed

Field Name	Ty
Name	T
Quota Retirement Amount	Cur
Category	Pic
Input records	Text
Last Calculated Date	Date
Current Email ACS	Cur

Previous Email ACS	Cur
Queued	Che
Qualified	Che
Opportunity	Lo
Contract	Lo
Unqualified Reason	T

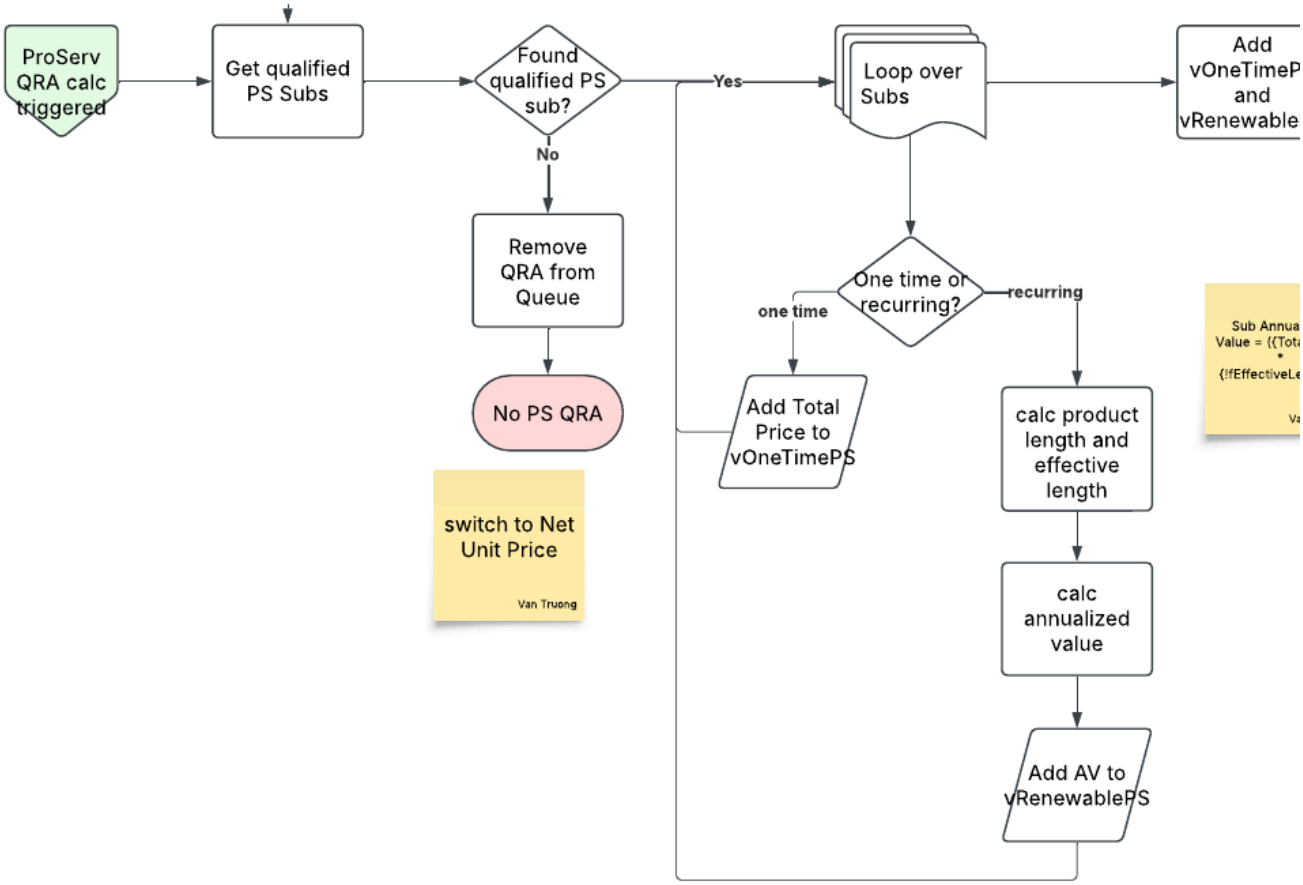
- Need to have been sold on same Opp as QRA
- Need to not have SMS on Replaced LTD




Email QRA calc triggered
Get sub related to Contract on Opp
Van Truong
Get TE and CE subs
Found CE?
Yes
Is CE Renewed?
No
Was this a TE to CE upgrade?
Van Truong
Is TE Renewed
Yes
If we have no commits this contract then there no increment
Van Truong
Get Spend Commit record for current contract
Found Spend Commit?
Yes
Get ACS from SC
Stamp currACS on QRA
No
Remove QRA from Queue
No Spend Commit info
No
Yes
Found TE?
No
Remove QRA from Queue
No Email QRA
Yes
Is TE Renewed?
Yes
No
Get Spend Commit record on contract
Found Spend Commit?
Yes
Get ACS from spend commit
Stamp Email QRA to QRA
Remove QRA from Queue
No
Remove QRA from Queue
No Spend Commit info

Renewable PS Subs
1. Advantage Essentials - SMS
2. Advantage Essentials - Email
3. Attentive Advantage (Multi-Product)
4. Email Deliverability
5. Technical Advantage

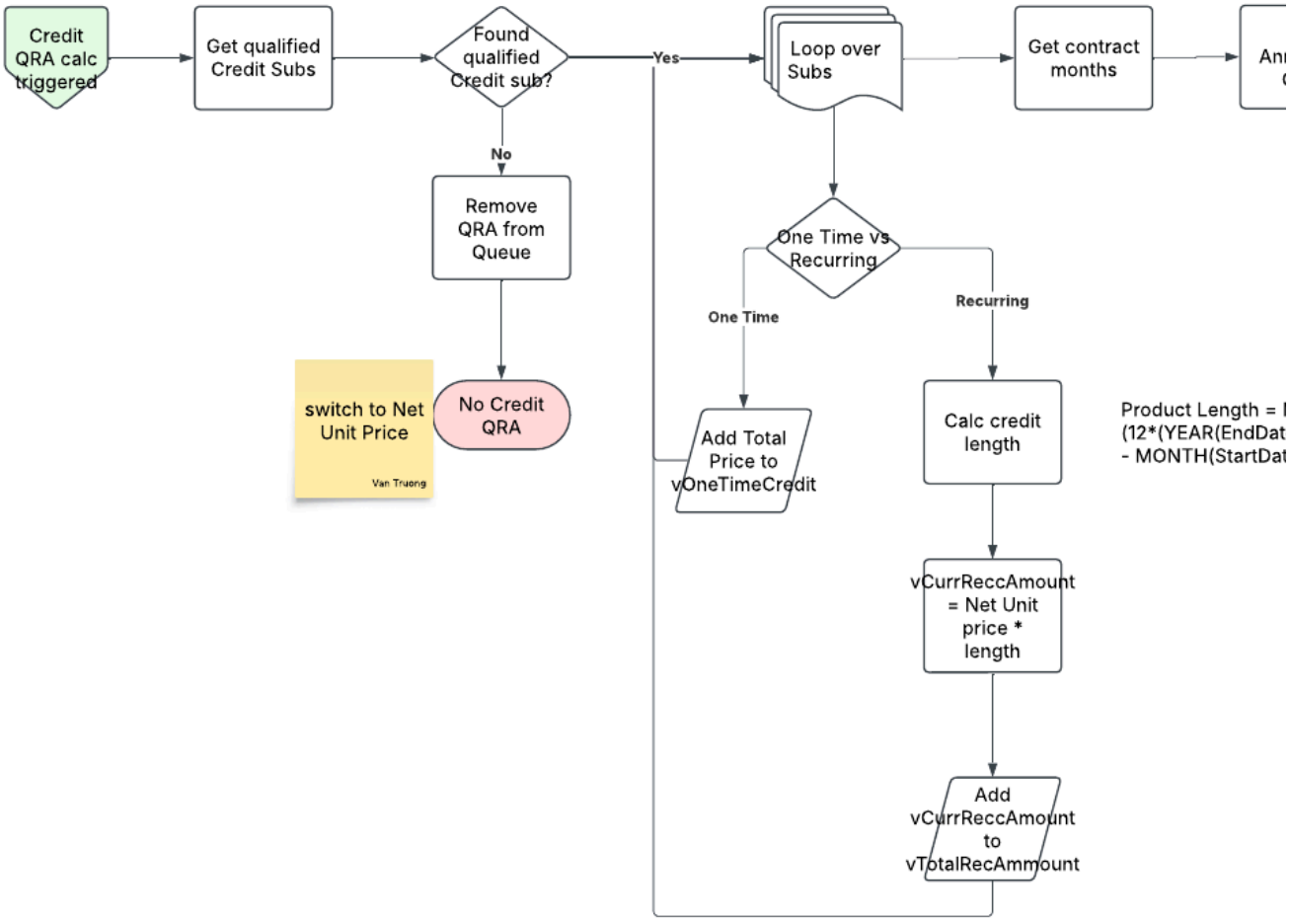
- Need to have been sold on same Opp as QRA
- For Renewable PS Subs, need to not have on Replaced LTD
- No look back needed on non-Renewable PS Subs



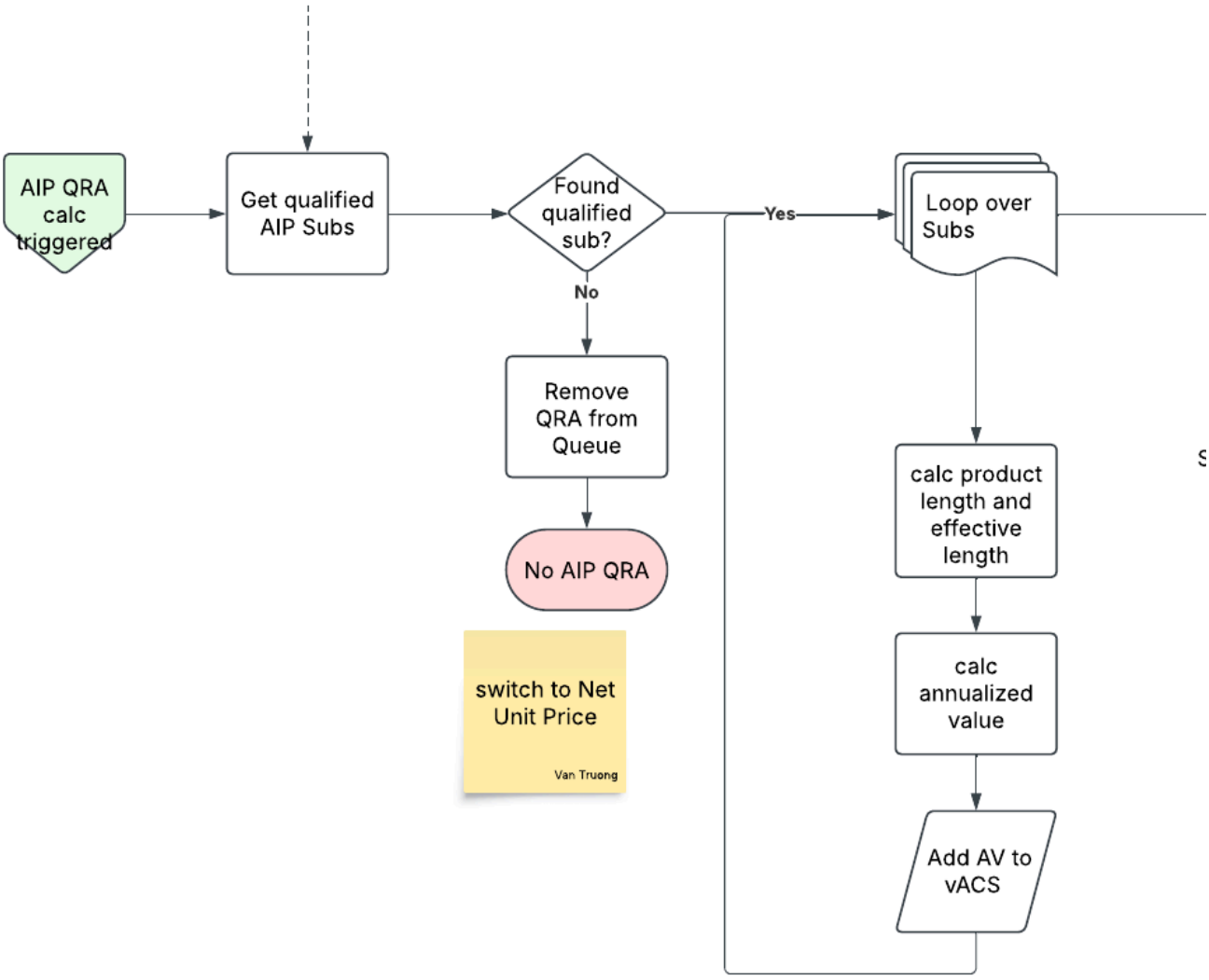
Excluded Credit types
I. 'Product Family' =
"Marketing Credit"
II. 'Product Code' = "One
Time Credit - Incentive"
AND 'Adjustment Type' =
"Contractual Credit - LTD
Message/Emails"

- Need to have been sold on same Opp as QRA
- No look back needed on credit subs
- Exclude specific credit types

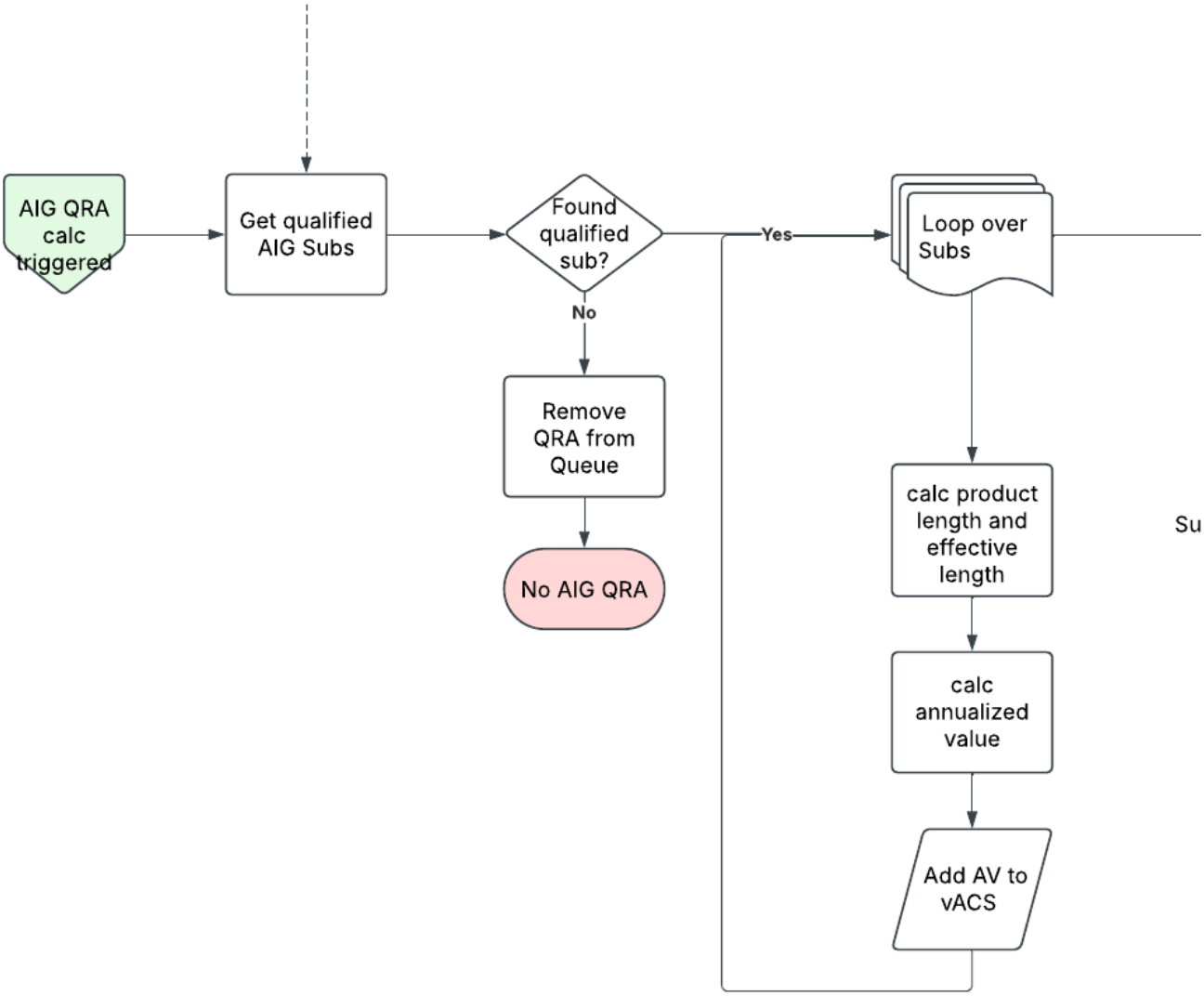
((vOneTi
(vTotalRe
(Contract



- Need to have been sold on same Opp as QRA
- Need to not have AIP on Replaced LTD



- Need to have been sold on same Opp as QRA
- Need to not have AIG on Replaced LTD



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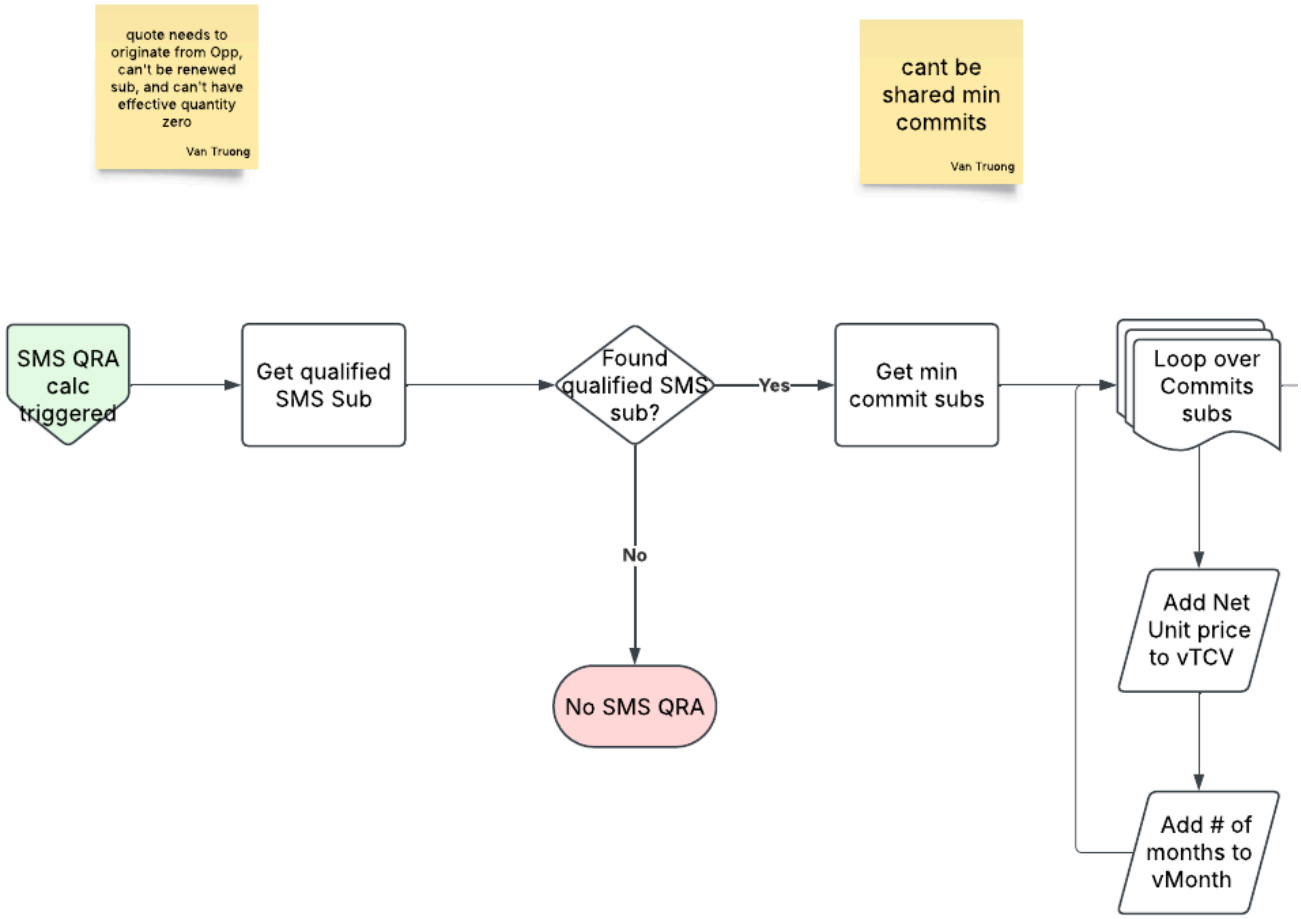
QRA object set up - 1 hour DONE
QRA creation flow on close won - 1 ho
QRA Recalc flow - 1 hour DONE
Sub creation queuing QRA - 2 hour DC
Stop SC push to Opp - 2 hour DONE
ACS field populated queuing QRA - DC
Renaming Fields - 1 hour DONE
SMS QRA calc - In QA
Email QRA calc - IN QA
PS QRA calc - 2 hour
Credit QRA - IN QA
AIP QRA - IN QA
AIG QRA - IN QA
above is inclusive of testing (debug ar

Maybe 4 days

Mass re-calc - 1 day (want to do this ir



System Links

- Flow Automation involved
  - Opportunity - AfterSave - Create QRAs on LTD Won
  - Opportunity - AfterSave - Recalc QRA
  - Subflow - Create/Recalc QRA
  - Spend Commit - AfterSave - Queue QRA for Calc
  - Subscription - AfterCreate - Queue QRA for Calc
  - Quota Retirement Amount - AfterSave - Calculate QRA
- Quota Retirement Amount Object
- Opportunity Fields

Label	API Name	Data Type
AI Grow Quota Retirement	AI_Grow_Annualized_Committed_Spend__c	currency (18, 0)

AI Pro Quota Retirement	AI_Pro_Annualized_Committed_Spend__c	currency (18, 0)
Email Quota Retirement	Email_Annualized_Committed_Spend__c	currency (18, 0)
ProServ Quota Retirement	ProServ_Annualized_Committed_Spend__c	currency (18, 0)
SMS Quota Retirement	SMS_Annualized_Committed_Spend__c	currency (18, 0)
Total Quota Retirement	*Total_Annualized_Quota_Retirement__c*	Formula (currency (18, 0))

Requirement Links

- BIZ-839: Clari Forecasting

Related Processes and Links

- Process Diagr@am/Solution Design