QRA Calculation Flowchart

Top Flow (Opportunity)

- **Opportunity has been created** → **Won LTD?**
  - **Yes** → **Rep/OO moves Opp to Signed** → **SFDC set opp for Finance Review** → **Finance approves opp** → **SFDC generates Order** → **Amendment?**
  - **No** → **Rep moves opp to CL or Churns** → **No Quota Retirement calc needed**

- **SFDC generates Order** → **SFDC generates OrderItems**

- **Amendment?**
  - **No** → **SFDC generates Contract** → **Generates Renewal Opp** → **Process repeats**
  - **Yes** → **Generate Subs**

- **QRA exists?**
  - **Yes** → **SFDC generates blank QRAs for Opp** → **Wait for Subs to generate**

Note (yellow): *There will be multiple QRA per Opp* — Van Truong

- **Generate Subs** → **Is Sub QRA eligible?**
  - **Yes** → **Find un-queued QRA** → **Found QRA?**
    - **Yes** → **Mark QRA for calculation queue** → **Wait for 15 minutes** → **QRA begin QRA calc** → **QRA product?**
    - **No** → **QRA already Queued**
  - **No** → **Sub is not needed**

Notes (yellow):
- *This is for each sub* — Van Truong
- *We won't do this for SMS or Email - piggy back off spend commit* — Van Truong
- *QRA's Opp has to be the same Opp that sold Sub* — Van Truong
- *5 minute delay before we try to find QRA* — Van Truong

- **Generate Subs** → **SMS/Email Min Commits?**
  - **Yes** → **Spend Commit automation** → **SFDC calculates ACS on Spend Commit Record**
  - **No** → **Not Spend Commit eligible**

Notes (yellow):
- *This is Spend Commit functionality* — Van Truong
- *This can have a different timeline from the other QRAs* — Van Truong

- **QRA product?**
  - **SMS** → **SMS QRA calc**
  - **Email** → **Email QRA calc**
  - **PS** → **Pro-Serv QRA calc**
  - **Credit** → **Credit QRA calc**
  - **AIP** → **AIP QRA calc**
  - **AIG** → **AIG QRA calc**

- All QRA calcs → **SFDC aggregates new total** → **Total QRA has been calc'd**

Bottom Flow (QRA recalc)

- **QRA recalc checked** → **Closed Won LTD?**
  - **Yes** → **Get QRA for Opp** → **QRA exists?**
    - **Yes** → **Queue them for calc** → **null out the quota retirement fields** → **Uncheck QRA Recalc**
    - **No** → **SFDC generates blank QRAs for Opp**
  - **No** → **Uncheck QRA Recalc** → **No Quota Retirement calc needed**
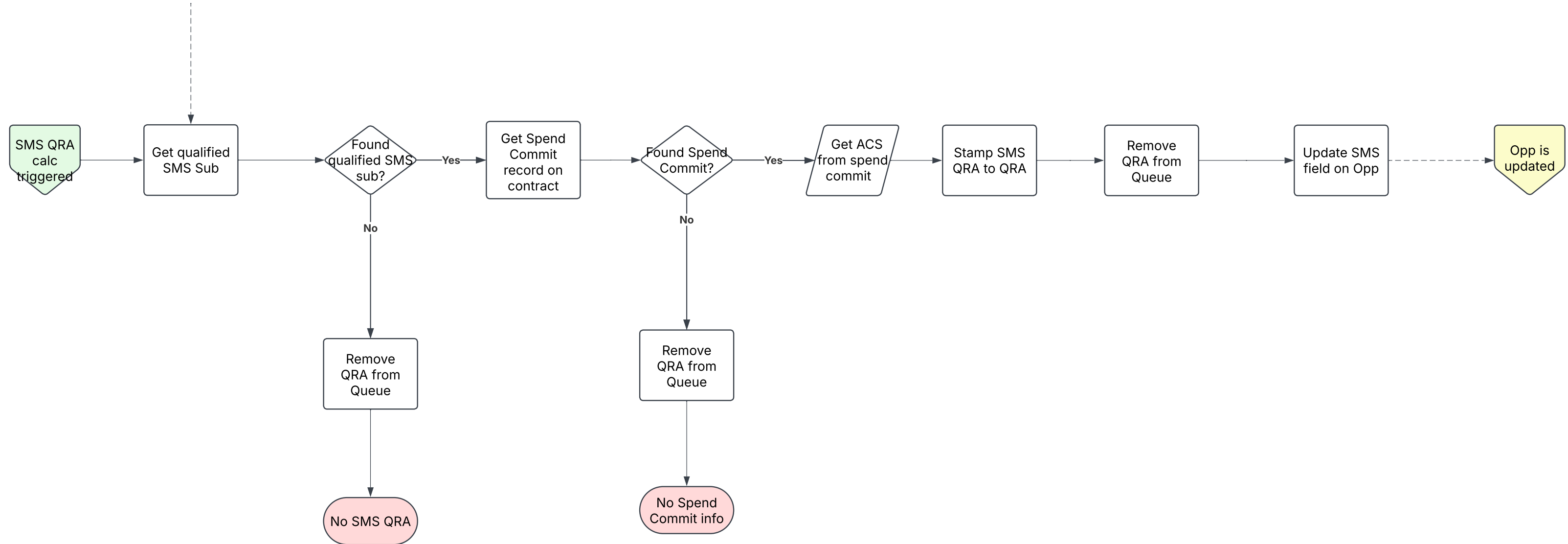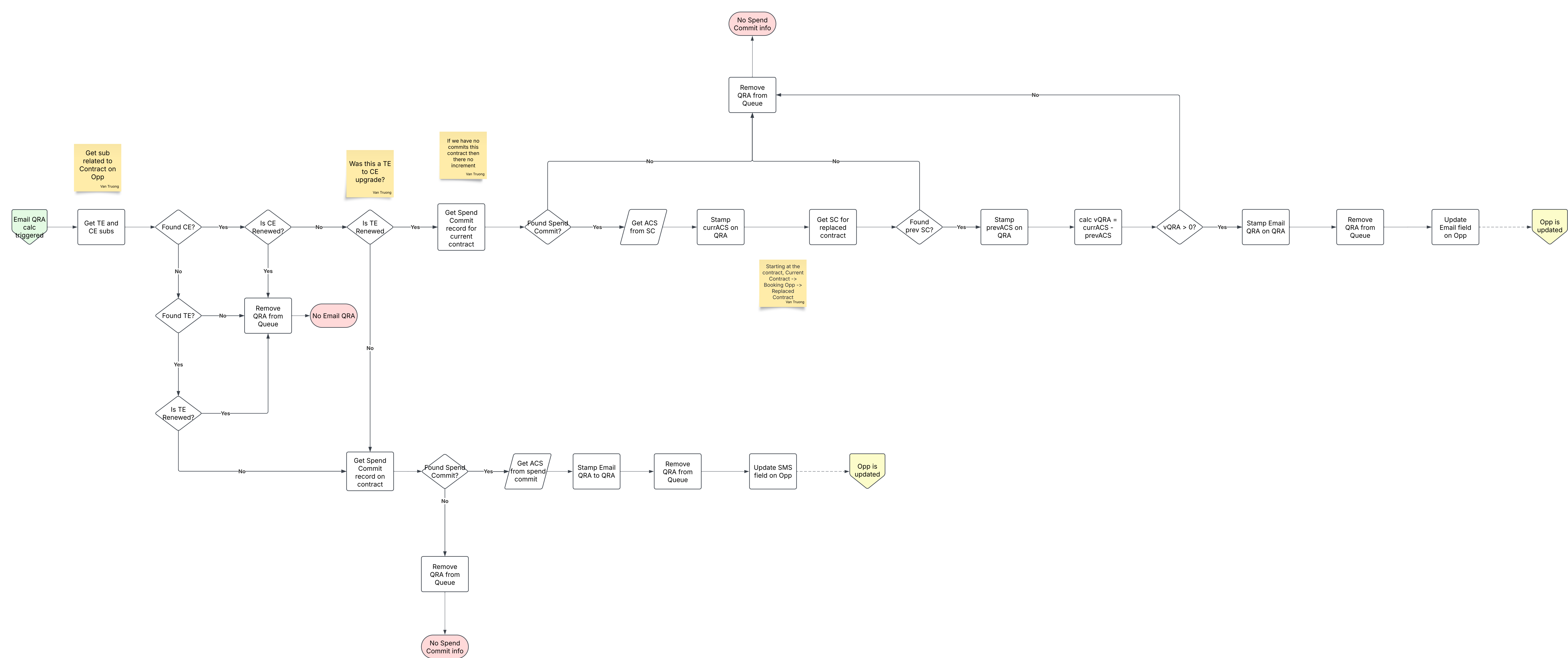
Note (yellow): *Include SMS and Email for backfill purpose* — Van Truong

Field Name	Type	Description
Name	Text	QRA#
Quota Retirement Amount	Currency	Amount calculated
Category	Picklist	SMS, Email, Pro-Serv, AIG, AIP
Input records	Text Area	CSV of each Sub ID aggregated or the Spend Commit ID
Last Calculated Date	Date Time	Date and time when QRA calc was completed
Current Email ACS	Currency	ACS from current contract
Previous Email ACS	Currency	ACS from previous contract
Queued	Checkbox	Trigger for caculation flows
Qualified	Checkbox	Indicates if this qualfiied for QRA stamping
Opportunity	Lookup	Opp associated to QRA
Contract	Lookup	Contract which Quota is being retired against
Unqualified Reason	Text	Why QRA is unqualified

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

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SMS QRA calc triggered → Get qualified SMS Sub → Found qualified SMS sub?
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Found qualified SMS sub? —Yes→ Get Spend Commit record on contract → Found Spend Commit? —Yes→ Get ACS from spend commit → Stamp SMS QRA to QRA → Remove QRA from Queue → Update SMS field on Opp ⇢ Opp is updated

Found qualified SMS sub? —No→ Remove QRA from Queue → No SMS QRA

Found Spend Commit? —No→ Remove QRA from Queue → No Spend Commit info

Flowchart text (left to right, top to bottom):

- Email QRA calc triggered
- Get TE and CE subs
- Found CE?
  - Yes → Is CE Renewed?
    - Yes → Remove QRA from Queue
    - No → Is TE Renewed
  - No → Found TE?
    - No → Remove QRA from Queue → No Email QRA
    - Yes → Is TE Renewed?
      - Yes → Remove QRA from Queue
      - No → Get Spend Commit record on contract

Sticky notes:
- Get sub related to Contract on Opp — Van Truong
- Was this a TE to CE upgrade? — Van Truong
- If we have no commits this contract then there no increment — Van Truong
- Starting at the contract, Current Contract -> Booking Opp -> Replaced Contract — Van Truong

Upper path:
- Is TE Renewed — Yes → Get Spend Commit record for current contract
- Found Spend Commit?
  - Yes → Get ACS from SC → Stamp currACS on QRA → Get SC for replaced contract → Found prev SC?
    - No → Remove QRA from Queue → No Spend Commit info
    - Yes → Stamp prevACS on QRA → calc vQRA = currACS – prevACS → vQRA > 0?
      - No → Remove QRA from Queue → No Spend Commit info
      - Yes → Stamp Email QRA on QRA → Remove QRA from Queue → Update Email field on Opp → Opp is updated
  - No → Remove QRA from Queue (→ No Spend Commit info)

Lower path:
- Get Spend Commit record on contract → Found Spend Commit?
  - Yes → Get ACS from spend commit → Stamp Email QRA to QRA → Remove QRA from Queue → Update SMS field on Opp → Opp is updated
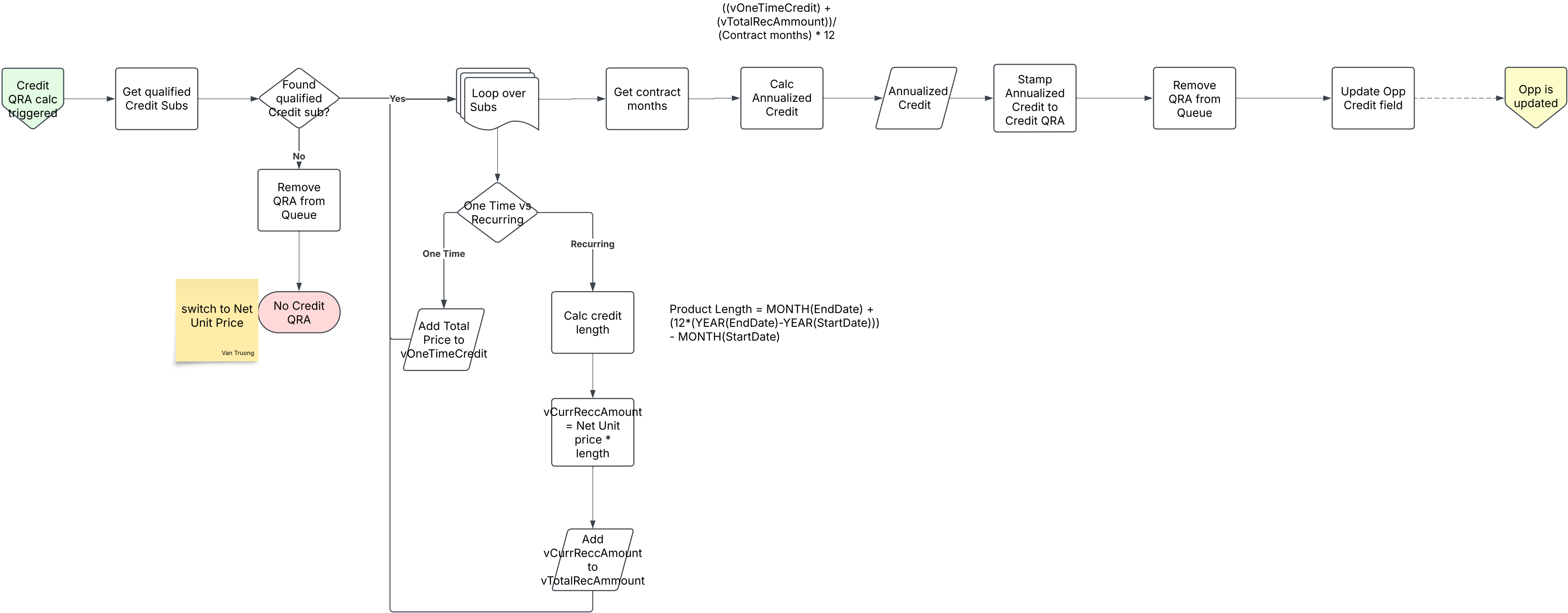 - No → Remove QRA from Queue → No Spend Commit info

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

```
ProServ QRA calc triggered → Get qualified PS Subs → Found qualified PS sub?
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Found qualified PS sub?
- No → Remove QRA from Queue → No PS QRA
- Yes → Loop over Subs

switch to Net Unit Price
Van Truong

Loop over Subs → Add vOneTimePS and vRenewablePS → PS QRA → Stamp PS QRA to QRA → Remove QRA from Queue → Update Opp PS field → Opp is updated

One time or recurring?
- one time → Multiply by Quantity → Add Total Price to vOneTimePS
- recurring → Multiply by Quantity → calc product length and effective length → calc annualized value → Add AV to vRenewablePS

Sub Annualized Value = ({TotalPrice} * {!fEffectiveLength})
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Effective length = IF({!fProductLength} < 12, {!fProductLength}, 12)
Van Truong

Product Length = MONTH({End_Date__c}) + (12*(YEAR({End_Date__c})-YEAR({Start_Date__c}))) - MONTH({Start_Date__c})
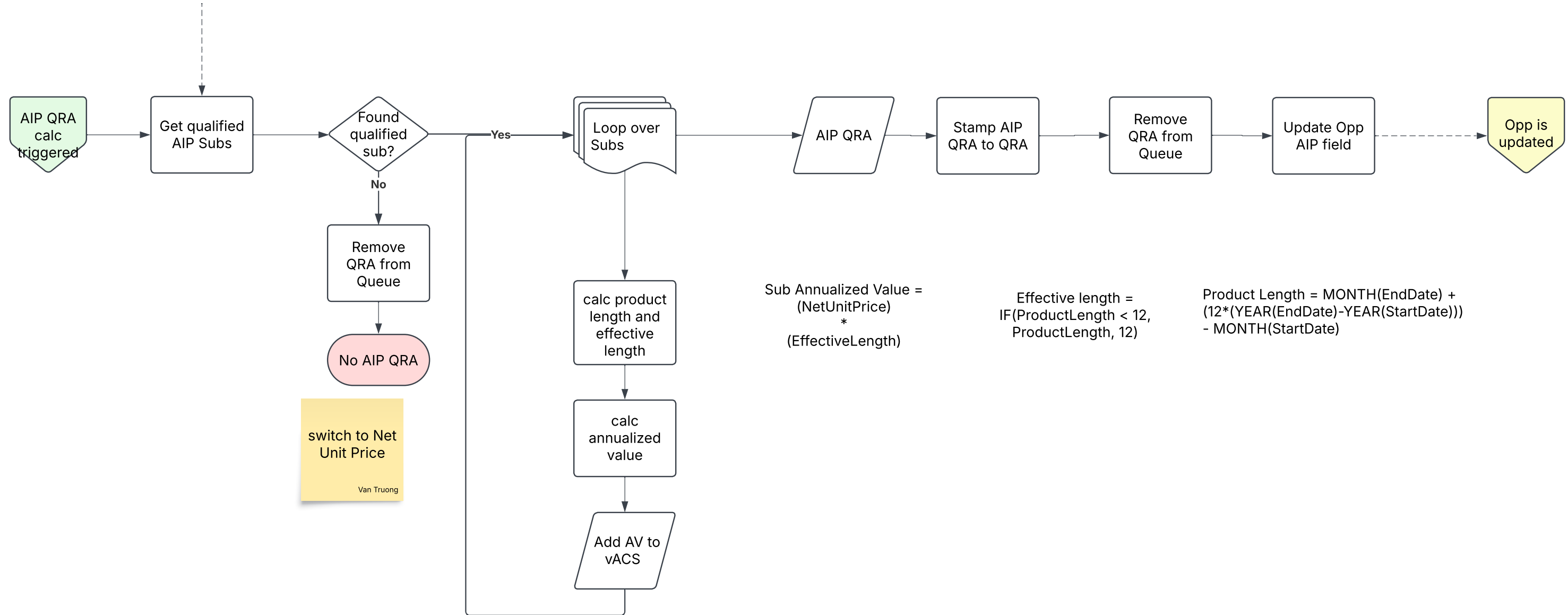Van Truong

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

$$\frac{((vOneTimeCredit) + (vTotalRecAmmount))}{(Contract\ months)} * 12$$

Credit QRA calc triggered → Get qualified Credit Subs → Found qualified Credit sub?

Found qualified Credit sub? → Yes → Loop over Subs → Get contract months → Calc Annualized Credit → Annualized Credit → Stamp Annualized Credit to Credit QRA → Remove QRA from Queue → Update Opp Credit field → Opp is updated

Found qualified Credit sub? → No → Remove QRA from Queue → No Credit QRA

switch to Net Unit Price

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Loop over Subs → One Time vs Recurring

One Time vs Recurring → One Time → Add Total Price to vOneTimeCredit

One Time vs Recurring → Recurring → Calc credit length

Product Length = MONTH(EndDate) + (12*(YEAR(EndDate)-YEAR(StartDate))) - MONTH(StartDate)

Calc credit length → vCurrReccAmount = Net Unit price * length → Add vCurrReccAmount to vTotalRecAmmount

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

AIP QRA calc triggered → **Get qualified AIP Subs** → **Found qualified sub?**

Found qualified sub? —Yes→ **Loop over Subs** → **AIP QRA** → **Stamp AIP QRA to QRA** → **Remove QRA from Queue** → **Update Opp AIP field** ⇢ **Opp is updated**

Found qualified sub? —No→ **Remove QRA from Queue** → **No AIP QRA**

switch to Net Unit Price

Van Truong

Loop over Subs → **calc product length and effective length** → **calc annualized value** → **Add AV to vACS**

Sub Annualized Value = (NetUnitPrice) * (EffectiveLength)

Effective length = IF(ProductLength < 12, ProductLength, 12)

Product Length = MONTH(EndDate) + (12*(YEAR(EndDate)-YEAR(StartDate))) - MONTH(StartDate)

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

AIG QRA calc triggered → **Get qualified AIG Subs** → **Found qualified sub?**

Found qualified sub? —No→ **Remove QRA from Queue** → **No AIG QRA**

Found qualified sub? —Yes→ **Loop over Subs** → **AIG QRA** → **Stamp AIG QRA to QRA** → **Remove QRA from Queue** → **Update Opp AIG field** → **Opp is updated**

Loop over Subs → **calc product length and effective length** → **calc annualized value** → **Add AV to vACS**

Sub Annualized Value = (NetUnitPrice) * (EffectiveLength)

Effective length = IF(ProductLength < 12, ProductLength, 12)

Product Length = MONTH(EndDate) + (12*(YEAR(EndDate)-YEAR(StartDate))) - MONTH(StartDate)