

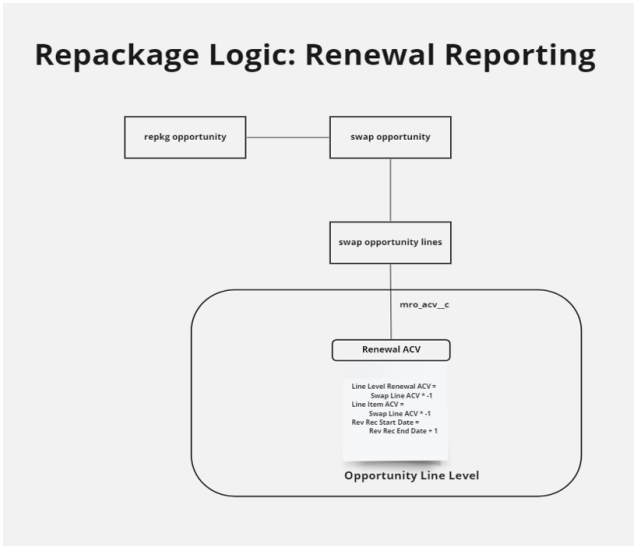
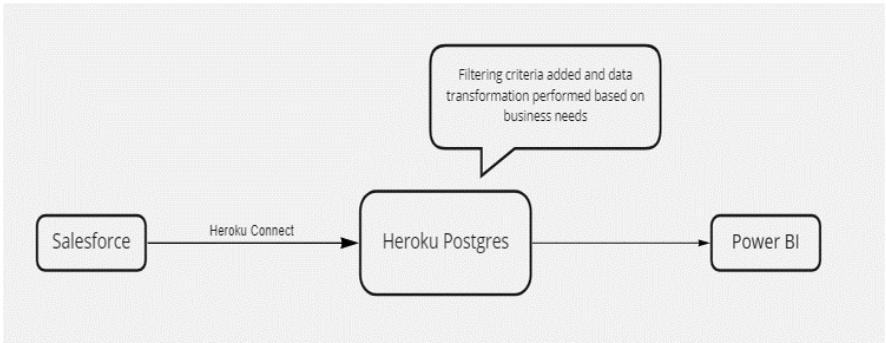
# Repackage Logic in BI Projects

**Problem Statement:**

- One aspect of repackages which causes issues today is that a single transaction takes place over two (or more) opportunities:
- The repackage opportunity – contains both growth and renewal dollars (R+G \$[+])
- The swap opportunity (or opportunities) – contain(s) the negative value of renewal dollars (R \$[-])
- Depending on the business requirements, some teams need to report only on the renewal portion of the dollar value of deals, some focus only on the growth portion, and some on both renewal and growth aspects
- Since the information for any given transaction is stored on multiple opportunities in Salesforce, and Salesforce does not split the overall ACV value into growth and renewal fractions, some work is needed on the BI front to split the ACV into growth and renewal fractions at the line level

**Renewals Reporting:**

- For the repackage deals, Renewals team wants to know the renewal portion of the dollar amount at the line level



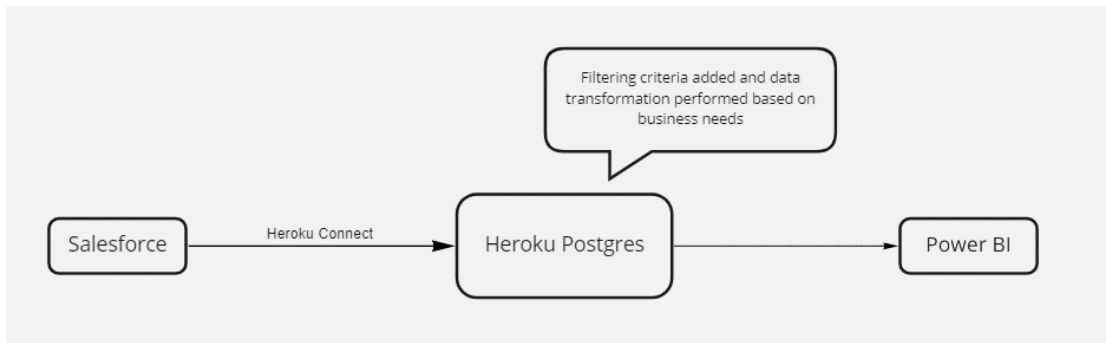
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• Filtering Criteria:

	Exclude	Include
R_G_line_Type	Growth	
Oppty Type	Swap	Swap
Oppty Swap Type	Re-Package	Re-Package
Is Contracted	True	
License Model	Not Null	
IS Ordered		True
CLA Oppty		True

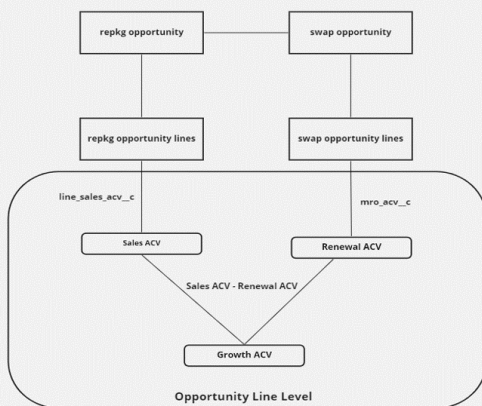
#### Sales Reporting:

- For the repackaging deals, Sales team wants to know the growth portion of the dollar amount at the line level
- When oppty type is Swap and swap type is Repackage (and repeat type is null), get the net growth acv amount



- The Sales ACV on swaps does not reflect the annualized value and therefore does not reflect the true net growth.
- For Swap opportunities we need to use the field 'Renewal ACV amount (Converted)' (**mro\_acv\_\_c**) to capture the annualized negative value of the renewal ACV.

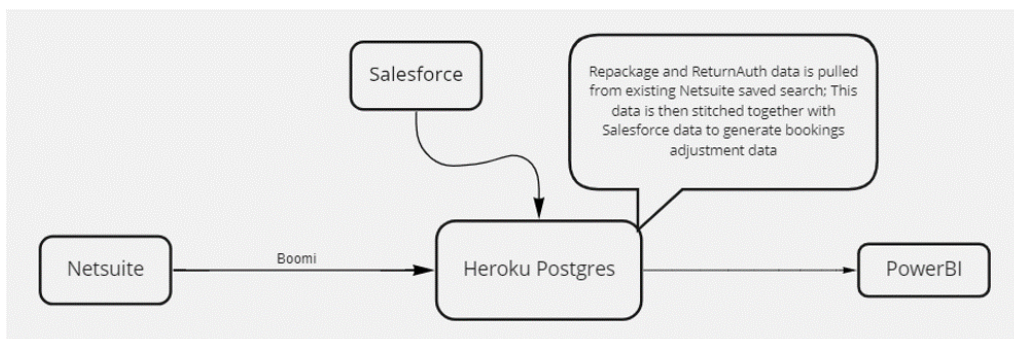
#### Repackage Logic: Sales Reporting



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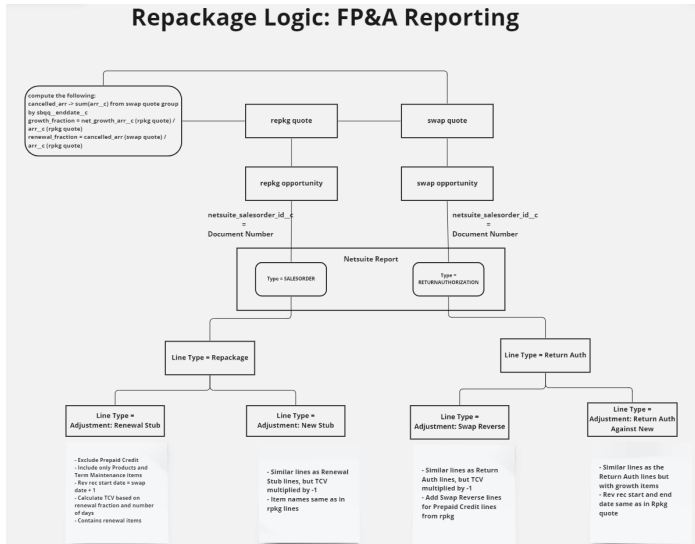
#### FP&A Bookings Reporting:

- FP&A bookings reporting requires both growth and renewal TCV splits at the line level
- Since FP&A uses Netsuite data for bookings, first the output from an existing Netsuite saved search is loaded into Heroku via Boomi
- This data is then combined with Salesforce data to derive the renewal and growth fractions and generate the bookings adjustments lines



- For each opportunity, the Heroku view returns data for the following line types
  - Repackage - The original repackaging lines coming from Netsuite as is

- Adjustment: Renewal Stub - The renewal portion of the repack lines
- Adjustment: New Stub - Subtraction of renewal portion from the repack lines, it represents the growth portion
- ReturnAuth - Original return auth lines coming from Netsuite as is
  - Adjustment: Swap Reverse - Reverse of the return auth lines, positive TCV values
  - Adjustment: Return Auth Against New - Same as return auth lines, but against the new growth SKUs
- For each opportunity, the 'Repackage' and 'ReturnAuth' lines come from the Netsuite saved search output
- The 'Renewal Stub', 'New Stub', 'Swap Reverse' and 'Return Auth Against New' lines (as applicable) are derived by stitching the Netsuite data with Salesforce data



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