



A High AI-Q[™]
Company



Quote-To-Cash Implementation With Salesforce Revenue Cloud

An enterprise-grade Salesforce Revenue Cloud platform for a global fitness software provider, uniting product catalog, guided quoting, billing, and Workday ERP integration into a single operational lifecycle.

Executive Snapshot

35%

Reduction in the turnaround time for sales representatives to generate accurate quotes and close deals.

95%

Reduction in the effort spent by the RevOps team on generating and dispatching monthly invoices.

60%

Reduction in the effort spent by account executives following up with clients on invoice payments.

0%

Manual effort required to reconcile revenue transaction data with the accounting ERP.

Overview

QBurst delivered an end-to-end Salesforce Revenue Cloud solution that modernized the client's sales and revenue operations globally.

- Implemented Salesforce Revenue Cloud as the core platform for the client's quote-to-cash operations.
- Enabled accurate quoting for global B2B customers using a unified catalog, product rules, pricing rules, approvals, branded documents, and tax integration.
- Supported recurring subscriptions, one-time fees, usage-based charges, milestone billing, and hybrid revenue models.
- Automated invoice generation, payment processing, credit handling, collections, and Workday accounting ERP integration.
- Delivered a secure customer portal for invoice visibility and self-service payments.



Client Profile

The client provides technology services and operational management software for gyms, local health club franchises, and enterprise fitness firms across the United States, Canada, Australia, Europe, and Southeast Asia.

Operating on a B2B model, they sell a mix of hardware, one-time setup services, recurring software subscriptions, and high-volume usage-based communication services.

Challenges

Managing complex B2B transactions across diverse regional entities introduced critical operational challenges related to revenue:

- **Global Quote Accuracy:** Sales teams needed to generate branded quotes with accurate product configuration, pricing, discounts, approvals, and tax calculations across multiple geographies.
- **Recurring and Usage-Based Billing:** Subscription products had to be billed on recurring cycles, while usage-based services required external consumption data to be imported, rated, and included before invoice generation.
- **Flexible Billing Responsibility:** Some invoices had to be billed directly to individual clubs, while others had to be billed to a parent franchise or group account responsible for multiple clubs.
- **Customer Self-Service:** Customers needed a secure portal to view outstanding invoices, verify invoice status, and make card or bank-transfer payments without relying on service representatives.
- **Finance Integration:** Customer, invoice, payment, revenue transaction, and finance transaction data had to be synchronized with Workday through a mix of real-time and scheduled integrations.

QBurst Solution

Leveraging the Salesforce Revenue Cloud architecture, QBurst designed and implemented a connected quote-to-cash solution for the client:

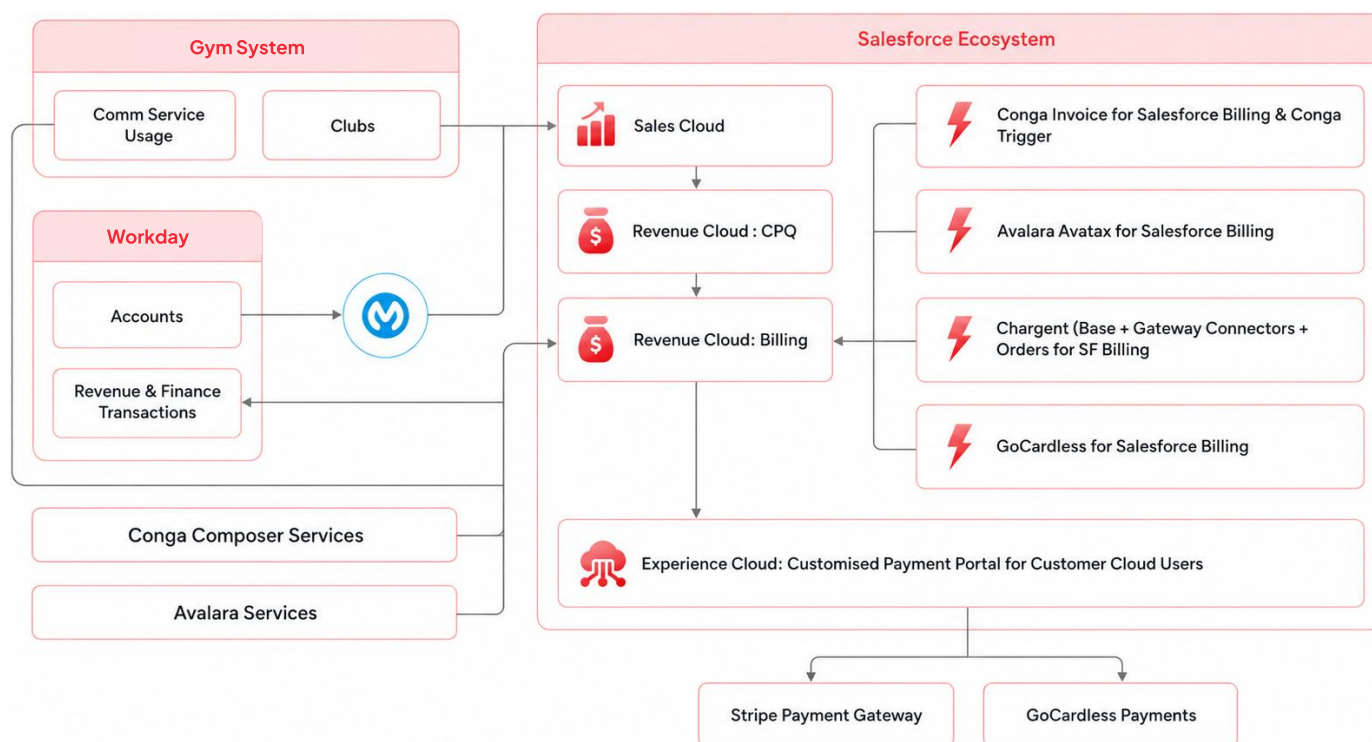
- **Unified Product Catalog and Pricing:** Modeled subscriptions, one-time services, usage-rated add-ons, support packages, and franchise bundles in a centralized catalog with configurable pricing, regional price rules, discount controls, and transparent calculation logic.
- **Guided Configuration and Quoting:** Implemented guided selling and configuration constraints to enable customer support agents to generate accurate quotes for single clubs, multi-location customers, and parent franchise groups with branded customer-facing documents containing product details, pricing, terms, taxes, and payment information.
- **Tax and Document Generation:** Integrated tax calculation for geography-specific quote and invoice accuracy and generated branded proposal documents directly from Salesforce transaction data.
- **Asset Lifecycle Management:** Converted closed-won deals into managed customer assets and subscriptions, giving sales and service teams visibility into active services, renewal dates, amendments, cancellations, suspensions, resumes, and entitlement details.
- **Order Automation:** Orchestrated downstream tasks such as service activation, software provisioning, customer onboarding, external usage-system registration, billing initiation, and exception handling.
- **Consumption Billing:** Integrated external usage-provider data through MuleSoft and Apex-based scheduled services, then matched consumption records to the correct customer asset or subscription for rating and invoice inclusion.
- **Billing Account Automation:** Used account hierarchy, custom fields, and Salesforce Flow automation to determine whether invoices should be billed to an individual club account or a parent franchise/group account.

- **Invoicing, Payments, and Collections:** Used Revenue Cloud Billing to create traceable invoices, apply tax-engine results, process card and bank payments through payment gateways, manage credits and refunds, and automate overdue-balance follow-up.
- **Experience Cloud Portal:** Built a customer self-service portal for invoice review, payment submission, transaction visibility, and billing-status updates.
- **Workday Integration:** Synchronized customer data, invoice records, payments, revenue transactions, and finance transactions between Salesforce and Workday using MuleSoft integration flows, REST APIs, event-driven processing, and scheduled billing-cycle jobs.

Key Features and Technical Highlights

- **Salesforce Revenue Cloud:** For unified product-to-cash lifecycle management across catalog, pricing, quoting, orders, assets, billing, and analytics.
- **Revenue Cloud Billing:** For subscriptions, consumption-based billing, invoicing, tax integration, payments and payment allocations, credit handling, collections, and the maintenance of accounting legal entities and ledger patterns.
- **Unified Product Catalog, Pricing, and Product Configurator:** For controlled product setup, pricing sequences, configuration constraints, bundling, discounting, and quote accuracy.
- **Asset Lifecycle and Order Automation:** For amendments, renewals, cancellations, fulfillment tasks, provisioning visibility, and downstream process initiation.
- **Experience Cloud and Lightning Web Components:** Customer-facing portal for invoice visibility, payment statuses, and self-service payment interactions.
- **Salesforce Flow, Apex, Platform Events, and Scheduled Jobs:** For billing-account automation, integration triggers, usage import cadence, exception handling, and operational automation.
- **MuleSoft and Workday APIs:** For secure integration across Salesforce, external usage systems, and the Workday accounting ERP system.

- **Payment Gateway Integrations:** For card and bank-transfer payment capture, payment status updates, and invoice reconciliation.
- **Revenue Analytics:** For MRR, ARR, subscription health, invoice aging, payment status, order delays, billing exceptions, churn risk, and revenue leakage monitoring.



Salesforce Revenue Cloud Architecture

Impact

- **Improved Revenue Operations:** Sales, service, revenue operations, and finance teams work from a connected Salesforce revenue lifecycle system spanning quote, order, subscription, invoice, payment, and accounting ERP integration.
- **Greater Billing Accuracy:** Recurring charges, one-time fees, tax treatments, usage-rated charges, credit notes, and payments for each order and its invoices are traceable through the entire life cycle.
- **Reduced Manual Effort:** Automation reduces repetitive work in quote preparation, billing-account assignment, usage import, invoice generation, payments, payment allocations, collections, and Workday handoff.

- **Better Customer Experience:** Health clubs and franchise customers can review invoices, understand balances, and make payments through a self-service portal.
- **Lower Revenue Leakage Risk:** The solution improves control over active subscriptions, usage records, amendments, renewals, invoice status, failed payments, and overdue balances.
- **Scalable Growth Platform:** The client can support new revenue models, global expansion, parent-child billing scenarios, prepaid or consumption-led offerings, and analytics-driven upsell opportunities.