



How a SaaS company enabled multi-opportunity selling by decoupling quotes from opportunities in Salesforce

Executive snapshot

A global SaaS company in the travel, expense, and accounts payable space relied on Salesforce for sales and renewals but struggled with a setup that allowed only one active Opportunity per account. Quotes were tightly linked to Opportunities, which made it hard to manage renewals, amendments, and new business at the same time.

Sales and renewal teams tracked parallel deals in spreadsheets, which led to poor visibility, manual work, and inaccurate forecasting.

RevSolutions rebuilt the core structure by decoupling Quotes from Opportunities and enabling multiple concurrent sales motions per account. The team delivered the solution in under three months with a full test pass rate and a clean production release.

About the client

The client operates in the SaaS space, offering travel, expense, and accounts payable solutions to enterprises. They follow a subscription model with usage-based pricing, multi-year contracts, amendments, and renewals.

Their sales motion includes:

- new business deals
- mid-term amendments
- expansions and reductions
- renewals running in parallel

Accurate pipeline tracking and revenue visibility are critical to how they operate.

The challenge

The client's Salesforce setup created major limitations in how teams managed deals.

- only one active Opportunity per account
- Quotes tightly linked to Opportunities
- no way to manage parallel sales motions in Salesforce



- teams tracked renewals and amendments in spreadsheets
- manual work in billing and reconciliation
- poor visibility into pipeline and revenue streams
- inaccurate forecasting and reporting

This setup did not reflect how the business actually sold and renewed contracts.

Why RevSolutions joined the project

The client needed a team that understood complex SaaS pricing, subscription changes, and Salesforce CPQ behavior. RevSolutions brought experience in handling subscription amendments, renewals, and billing integrations.

The focus was clear:

- enable multiple Opportunities per account
- separate Quotes from Opportunities
- support real-world sales motions
- keep CPQ and billing processes stable

The solution and implementation

RevSolutions delivered an MVP that restructured how Opportunities and Quotes work inside Salesforce.

Key systems used:

- Salesforce CPQ
- Sales Cloud
- custom automation using Apex, flows, and validation rules

Core capabilities delivered:

- multiple concurrent Opportunities per account
- support for new business, amendments, and renewals
- ability to create amendment and renewal Opportunities without quotes
- automated creation of renewal Opportunities
- accurate ARR calculations across active and expired subscriptions
- proper handling of amendments and contract changes
- improved permission controls and UI clarity

Delivery details:

- 25 work items completed
- 68 test cases executed with 100 percent pass rate
- delivered in 2 months and 14 days
- deployed through a governed release with no rollback



Results and impact

The client aligned Salesforce with how their sales and renewal teams actually work.

- sales and renewal teams no longer use spreadsheets
- clear separation of new business, expansion, and renewal revenue
- improved forecast accuracy
- better visibility for leadership
- smoother handoffs across sales, finance, and operations
- removal of manual work and related errors

Highlights and next steps

This project stands out because it changed a core limitation in Salesforce without breaking existing CPQ or billing processes. The team delivered a major architectural shift in under three months with a stable release.

Next steps include:

- deeper integration with the billing platform
- advanced pricing and bundling logic
- further improvements in revenue workflows