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SALESFORCE GO FOR REVENUE CLOUD · WINTER '27

Dunning Orchestration Solution

Salesforce Go for Revenue Cloud Series · Episode 4

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INTRODUCTIONS

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- Principal Technical Architect, Stratus Carta
- 10 years in Salesforce: Revenue Cloud and Steelbrick CPQ (Quote-to-Cash)
- 3 years on the Revenue Cloud Practice Lead team, Delivery Excellence (Salesforce)



OVERVIEW

Agenda

1. What is dunning?
2. What the Dunning Orchestration Solution installs
3. How a dunning journey runs
4. Demo, and the issues we hit
5. Limitations, and how I'd use it on a project

What is ***DUNNING?***

BACKGROUND

From order to cash: where dunning fits

01	02	03	04	05
Quote & order	**Billing schedule**	**Invoice**	**Payment**	**Dunning**
WHAT HAPPENS				
The customer agrees to buy, and the deal becomes an order	The order sets what to bill, how much and when	The customer gets a bill with a due date	The customer pays on time, or doesn't	Unpaid invoices get reminders, then escalation
IN SALESFORCE				
Quote, then Order and Order Products	Billing Schedules created from the order	Invoice generated by an invoice run, then posted	Payment applied to the invoice	Collection Plan and Items, then a DRO dunning journey

DUNNING

Chasing payment, one step at a time

- The reminders and escalations that run when invoices come due or go overdue
- Most late payments aren't malicious: people forget, cards expire, invoices get lost
- The skill is timing and tone: firm enough to collect, gentle enough to keep the customer
- Riskier customers get earlier reminders and faster escalation

A typical journey

Before the due date: a friendly reminder
On the due date: a due notice
After it: a suspension warning
Later: a call from collections

In Revenue Cloud

Invoices, grouped into collection plans, each with an overdue risk indicator

What is the ***DUNNING ORCHESTRATION SOLUTION?***

DUNNING ORCHESTRATION SOLUTION

Risk-based dunning, built on DRO

- Salesforce Go with Summer ’26 release
- Automates payment reminders, from early reminder emails to a manual recovery call
- Runs on Dynamic Revenue Orchestrator, the same engine as Episode 3
- Two journeys, picked by each collection plan's risk

Demo path

Setup › Salesforce Go
Revenue › Dunning Orchestration Solution Install
Steps: Validate Templates, Install Templates

License

Revenue Cloud Billing · Enterprise, Unlimited or Developer Edition

WHAT THE SOLUTION INSTALLS

Records, not code: what Salesforce Go loaded

1
Fulfillment workspace

2
Step groups

16
Step definitions

3
Email templates

Fulfillment workspace
Collections Dunning Orchestration Workspace, usage type Billing

High Risk Accounts
8 steps, starting 10 days before the due date

Low and Medium Risk
8 steps on a gentler schedule, starting 5 days before

Fulfillment scenarios
High risk gets one group; everything else, the other

Email templates
Early Reminder, Invoice Due Notice and Suspension Notice

Data only
No metadata or flows deployed, just the records above

DUNNING JOURNEYS

Two journeys, picked by risk

Step	***Low and Medium risk***	***High risk***
Picked when the risk indicator is	Low or Medium (not High)	High
First reminder email	5 days before the due date	10 days before the due date
Second reminder email	—	5 days before the due date
Collection plan due date	Milestone	Milestone
Suspension notice	7 days after	3 days after
Manual recovery call	10 days after	4 days after

https://help.salesforce.com/s/articleView?id=ind.billing_configure_dunning_orchestration.htm&type=5

HOW TO START IT

Start a journey from a collection plan

- Open a collection plan and click Initiate Dunning Orchestration
- The scenario picks a step group from the Overdue Risk Indicator
- An orchestration plan starts, and steps wait for each milestone
- Emails go out per collection plan item; a person makes the final call

Before you start

Risk indicator set: Low, Medium or High
At least one item, linked to an invoice
Contact details on the plan
Submit Transactions and Orchestrate User permission set

Missing the button?

Add Initiate Dunning Orchestration to the Collection Plan page layout

DEMO

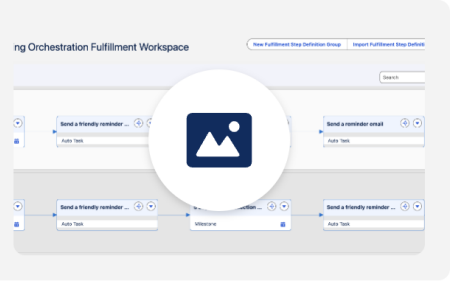
Installing the Dunning Orchestration Solution

Revenue

Dunning Orchestration Solution

Automatically orchestrate payment reminders for due and overdue invoices using Dynamic Revenue Orchestrator templates, and design segment-based dunning journeys to streamline and accelerate revenue collection.

1 of 1 Steps Completed



Install Dunning Orchestration Solution

Installed on 10/26/2026 3:06:55 PM

Installed

Validate Templates

Validates that the preconfigured email templates and the fulfillment workspace template are configured without data discrepancies.

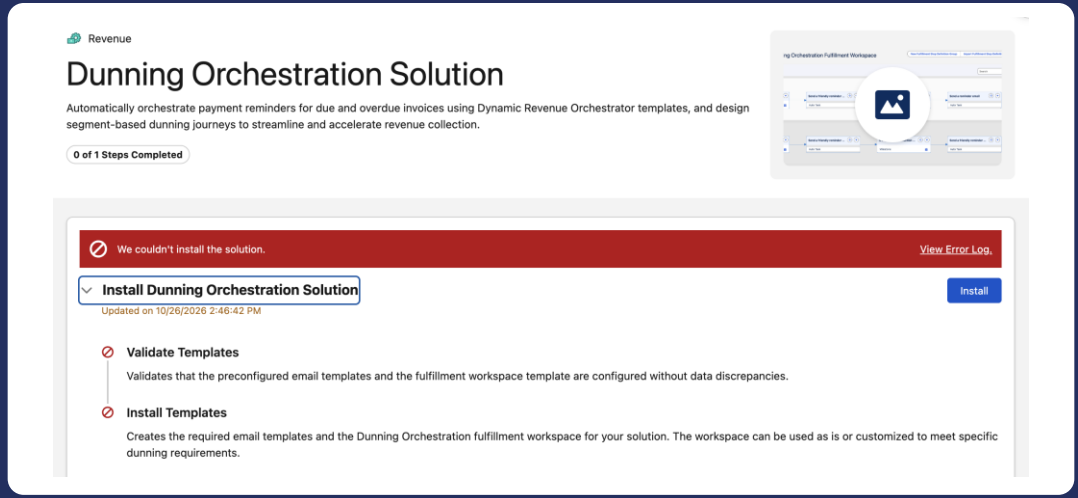
Install Templates

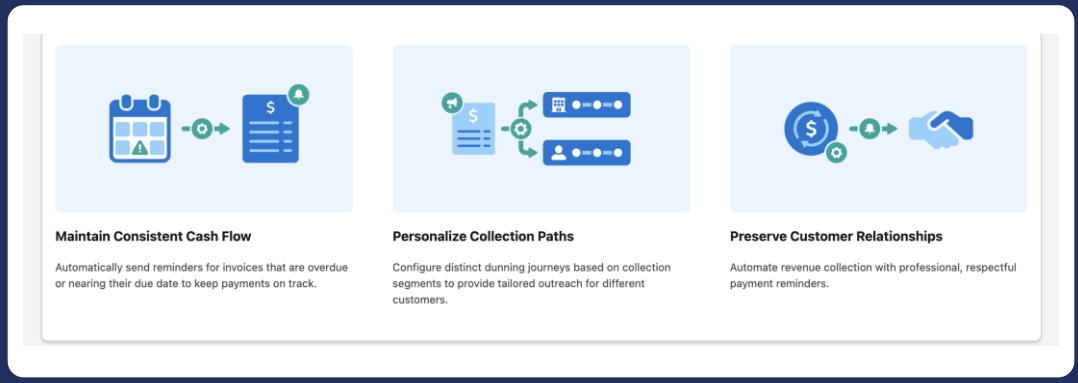
Creates the required email templates and the Dunning Orchestration fulfillment workspace for your solution. The workspace can be used as is or customized to meet specific dunning requirements.

DEMO

From failed to installed

- Two steps: Validate Templates, then Install Templates
- My first attempts failed on both; View Error Log named the missing pieces
- After the fixes on the next slide, refresh and press Install again
- Done = "Installed" and "1 of 1 Steps Completed"
- Failed runs leave copies behind, so check for duplicates





Installing the Solution: What to Expect

Three things blocked the install, and how to fix them

01 Billing usage type missing

Error: Field 'UsageType' picklist value 'Billing' not found in org

Tip: Turn on Dunning Orchestration in Billing Settings. Billing must be on first.

03 Scheduling fields missing

Error: Field 'ExecuteOn', 'DelayOf' or 'DelayUnit' does not exist

Tip: Turn on Future-Dated Tasks in Dynamic Revenue Orchestrator Settings.

02 Licenses and permissions

The install user needs three assignments. Without the Collections and Recovery license, the toggle won't stay on.

Assign to the install user

- Billing Advanced permission set license
- Billing Collections and Recovery Specialist permission set
- Collections and Recovery permission set license

Tip: Assign all three, refresh the page and press Install again. Our first two runs left extra copies behind.

DEMO

The test records behind the demo

Record	***Details***
Contact: Dunning Test2	On Any Partner Inc, with a test email that reaches no real inbox
Invoice DOC-000000001	$7.99, due 1 Oct 2026, posted from billing schedule BS-000000001
Collection plan CP-000000003	Any Partner Inc · Usage Type Billing · Risk High · due 6 Nov 2026
Collection plan item CPI-000000001	Links the plan to the invoice, so the emails have something to send

Running a Journey: What to Expect

Three things that stopped dunning from running

01 Access denied on Initiate

Error: SF_DRO_ORCH_IA_00003 Access Denied

Tip: Assign Submit Transactions and Orchestrate User to anyone who starts it.

03 Blank risk indicator

Error: Empty Plan Not Supported. A blank value matches neither scenario.

Tip: Every collection plan needs Low, Medium or High.

02 Plan with no items

Orchestration ran, but every email step completed with "has no associated items. Skipping" and sent nothing.

Why

- The reminder flow emails per collection plan item
- No items means no emails, and no error
- Each item must be linked to an invoice

Tip: Test with a plan that has at least one item linked to an invoice.

LIMITATIONS

What to watch out for

Limitation	*Impact*
Started by hand	Someone clicks Initiate Dunning Orchestration on each plan
Timing follows the plan's due date	Not each invoice's own due date
A blank risk indicator breaks it	Every plan needs Low, Medium or High
Permission set not assigned	Add Submit Transactions and Orchestrate User yourself
Retries leave copies	Clean up duplicate records after a failed install
License-gated	Needs Revenue Cloud Billing and Collections and Recovery

BEST PRACTICE

How I'd use it on a real project

Set risk segments

Decide what Low, Medium and High mean for your customers before tuning the journeys

Make the emails yours

Rebrand the three templates and match your collections team's tone

Test with real plans

Run it in a sandbox on plans with items and invoices, then adjust the timing

No Billing?

This solution needs the RCB license, so it won't install. For RCA, if your billing runs elsewhere, keep dunning where the payments are, and show the overdue status in Salesforce so sales and service can see it.

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Thank you

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