X-Data

Revenue Management in Excel

Whether you're in Sales, Marketing, Operations, or one of the many other departments that use Salesforce, chances are that Microsoft Excel® is also an application you use and depend on. Model N X-Data is an Excel-based solution that enables Model N Revenue Cloud users to access and manage their data entirely within Excel. X-Data is an easy-to-use solution designed to help busy professionals increase their productivity throughout the revenue management lifecycle. X-Data provides Excel templates that enable users to securely export, analyze, update and load data according to access controls defined in Salesforce. With X-Data, administrators can create new templates and deploy them on a global scale in minutes.

Drive Productivity and User Adoption

Model N's Revenue Cloud applications, including Configure Price Quote (CPQ), Contract Lifecycle Management (CLM), and Rebate Management, were built with both administrators and end-users in mind. With X-Data, usability and productivity are taken to the next level by allowing your users to manage their quotes, contracts, and rebates without leaving Excel. You can create and deploy a new quoting application to your global sales team in minutes. Whether they're on the airplane or on the train, sales reps will love the convenience of being able to create and update quotes, even while offline.

Making Revenue Management Faster and Easier

Update quotes in X-Data in Excel

Key Features
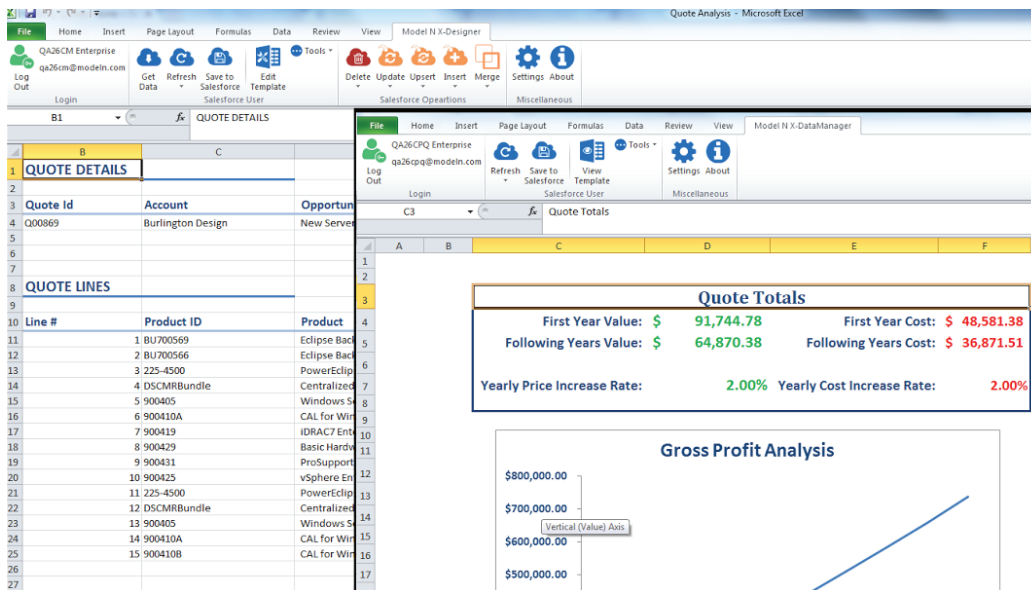
- X-Data toolbar in Excel
- X-Designer template builder
- Out-of-the-box templates
- Centralized template management
- Automated update logging
- Integration with any Model N Salesforce-native application

Key Benefits

- Analyze data more effectively using Excel
- Migrate and mass update data faster and more easily
- Increase administrator and user productivity
- Increase user adoption

Excel is one of the most widely used business tools ever created. With X-Data, you can connect Excel to any Revenue Cloud application and automate many administrative and end-user tasks with the click of a button in Excel. X-Data makes managing Revenue Cloud objects such as quotes, contracts, and rebate programs faster and easier by enabling users to extract records en masse to Excel where they can be analyzed, modified, then (if desired) updated back into Revenue Cloud. For administrators, X-Data is also a great tool for data migration, making it possible to bi-directionally transfer large volumes of data between an Excel spreadsheet and any Revenue Cloud object.

Create and modify templates in X-Designer in Excel

For more information about Model N X-Data, [click here](#).

Key Capabilities

- Extract, update, upload and merge records

- Map multiple objects per Excel worksheet

- Create dynamic lookups from Excel to Salesforce

- Create new templates and configure UI to access them