



# *Philippines* **DREAMIN' 2025**

JANUARY 25, 2025 | CROWNE PLAZA MANILA GALLERIA



# Goodbye CPQ, Hello Revenue Cloud! Introduction to Revenue Cloud

In this session, we will go through the basics of Revenue Cloud, understand the history and other CPQ solutions provided by Salesforce, see a quick demo, and find out where to learn more!



**Georgii Saveliev**  
**Stratus Carta**



# Agenda

- Introductions
- What is Revenue Cloud?
- Product Catalog Management (PCM) & Salesforce Pricing Overview
- Configure Price Quote (CPQ) & Dynamic Revenue Orchestrator (DRO) Overview
- Salesforce Contracts Overview
- Enablement Resources
- Q&A





# Georgii Saveliev

Founder & Certified Technical Architect (CTA)

11 years in Salesforce

7 years in Salesforce Industries

Ex-Vlocity / Ex-Salesforce

41x Certifications, 2x Accredited Professionals

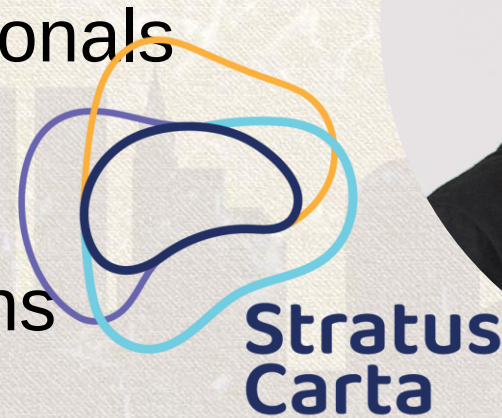
Certified Technical Architect (CTA)

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20+ Salesforce Industries Implementations

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Dubai Architect Group Co-Leader





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# Stratus Carta



## Salesforce Industries Expert Services

### Expert Services

Stratus Carta is the go-to hands-on advisor for Salesforce Industries and Revenue Cloud customers globally, tackling the hardest challenges in the ecosystem. Our areas of expertise include DevOps, EPC / PCM / CPQ / OM / DRO / BRE design, proof of concepts, performance tuning, scale testing, best practices reviews, upgrades, data migration, greenfield vs brownfield assessments, and more



salesforce

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# What is Revenue Cloud?



# Industries CPQ & Salesforce CPQ



**Founded:** 2014 by David Schmaier

**Focus:** Industry-specific CRM solutions, tailored for sectors like telecommunications, insurance, health, energy, and utilities.

**Functional Modules:** Product Catalog, CPQ, MACDs, Order Management, Contract Lifecycle Management, Document Generation, Feature-rich APIs, OmniStudio, Industry-specific Data Models

**Acquisition by Salesforce:** In 2020, Salesforce acquired Vlocity for \$1.33B.

**Integration:** Vlocity has been rebranded as a major part of **Salesforce Industries (Industries CPQ)**, enhancing Salesforce's vertical-specific offerings with deep industry expertise and tailored solutions.



**Founded:** 2009 by Godard Abel

**Focus:** Configure, Price, Quote (CPQ) solutions, designed to streamline the quoting and billing processes for sales teams.

**Functional Modules:** Product Catalog, CPQ, Contract Amendments, Document Generation, Basic APIs

**Acquisition by Salesforce:** In 2015/2016, Salesforce acquired SteelBrick for \$360MM.

**Integration:** Now known as **Salesforce CPQ**, SteelBrick's functionalities are available as an add-on on top of Sales Cloud, providing robust CPQ capabilities to enhance sales efficiency and accuracy.



# Industries CPQ & Salesforce CPQ

According to Gartner's 2023 Magic Quadrant for CPQ



More Complete Vision



Better Ability to Execute





# Revenue Cloud

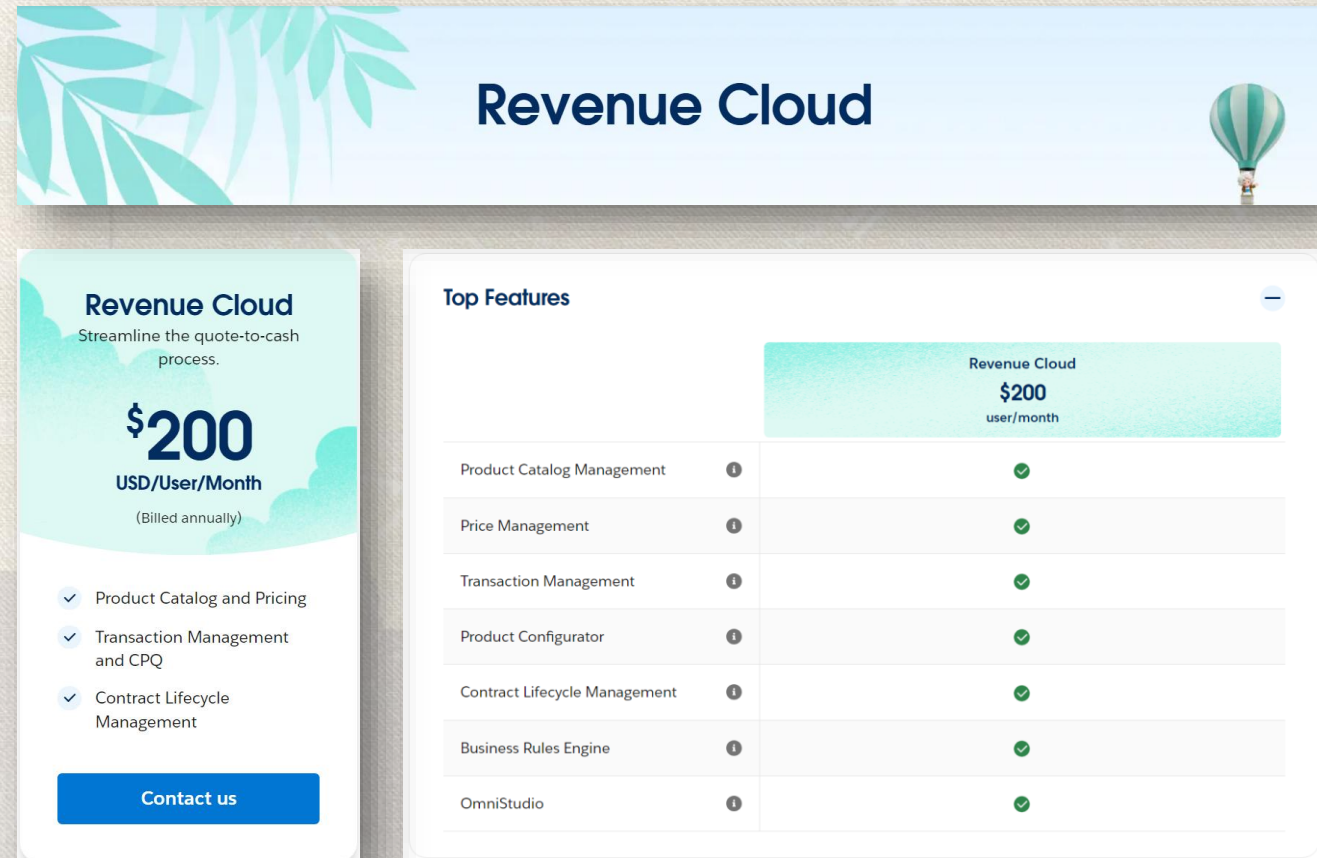
As of January 2025

Enter Revenue Cloud!

Revenue Cloud officially Generally Available (GA) as of 13 Feb 2024

Press release on 17 Jun 2024 mentioned customers in the Professional Services and Software industries

Pieces of Revenue Cloud available in Communications Cloud, Media Cloud, and Energy & Utilities Cloud



The image shows a promotional banner for Revenue Cloud. The banner has a light blue background with a green leaf pattern on the left and a hot air balloon on the right. Below the banner is a pricing card with a teal background. The card features the text 'Revenue Cloud Streamline the quote-to-cash process.' and a large '\$200 USD/User/Month (Billed annually)' price tag. Below the price tag are three bullet points: 'Product Catalog and Pricing', 'Transaction Management and CPQ', and 'Contract Lifecycle Management'. A blue 'Contact us' button is at the bottom of the card.

## Revenue Cloud

Revenue Cloud  
\$200  
user/month

Top Features

|                               |   |   |
|-------------------------------|---|---|
| Product Catalog Management    | 1 | ✓ |
| Price Management              | 1 | ✓ |
| Transaction Management        | 1 | ✓ |
| Product Configurator          | 1 | ✓ |
| Contract Lifecycle Management | 1 | ✓ |
| Business Rules Engine         | 1 | ✓ |
| OmniStudio                    | 1 | ✓ |



# Revenue Cloud

**Revenue Cloud** is a **suite of products** offered by Salesforce

**Revenue Cloud** is also a new **CPQ + Order Management product** that integrates with Salesforce Contracts and potentially other products in the future

## Revenue Cloud

Salesforce CPQ

Salesforce  
Contracts

Revenue Cloud

Salesforce Billing





# Revenue Cloud

## Configure Price Quote (CPQ)

Product  
Configurator

Quote & Order  
Capture

*Salesforce  
Contracts \**

## Dynamic Revenue Orchestrator (DRO)

Decomposition

Orchestration

## Product Catalog

Product Catalog  
Management (PCM)

Salesforce Pricing

Business Rules  
Engine (BRE)

DRO Design-Time

Sales Cloud

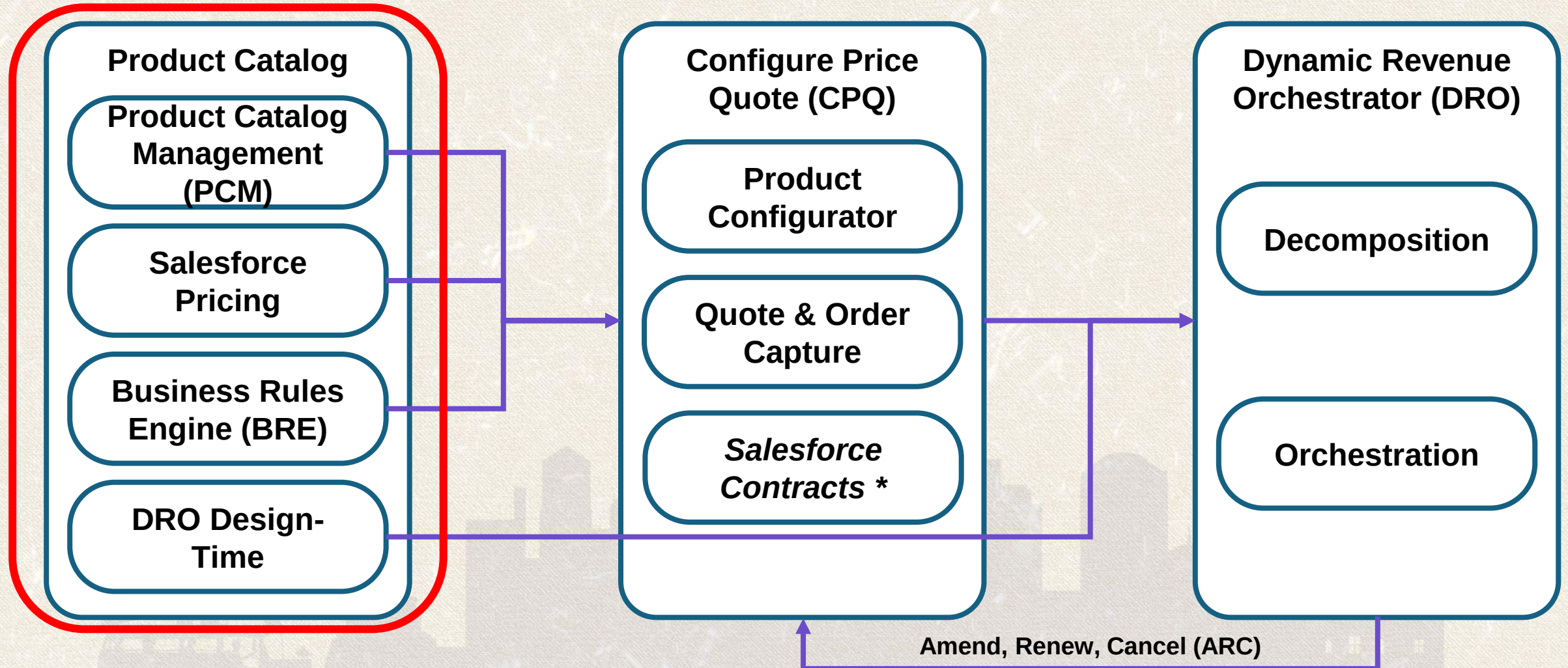
Service Cloud

OmniStudio

Salesforce Platform



# Revenue Cloud





# Revenue Lifecycle Management (RLM)?

Goodbye Revenue Lifecycle Management (RLM), Hello Revenue Cloud!



This rebrand happened during Dreamforce 2024 – Note you may see some mistakenly refer to it as “Revenue Cloud Advanced” but this one of the SKU names whereas “Revenue Cloud” is the product name, so you should refer to the new solution as “Revenue Cloud”

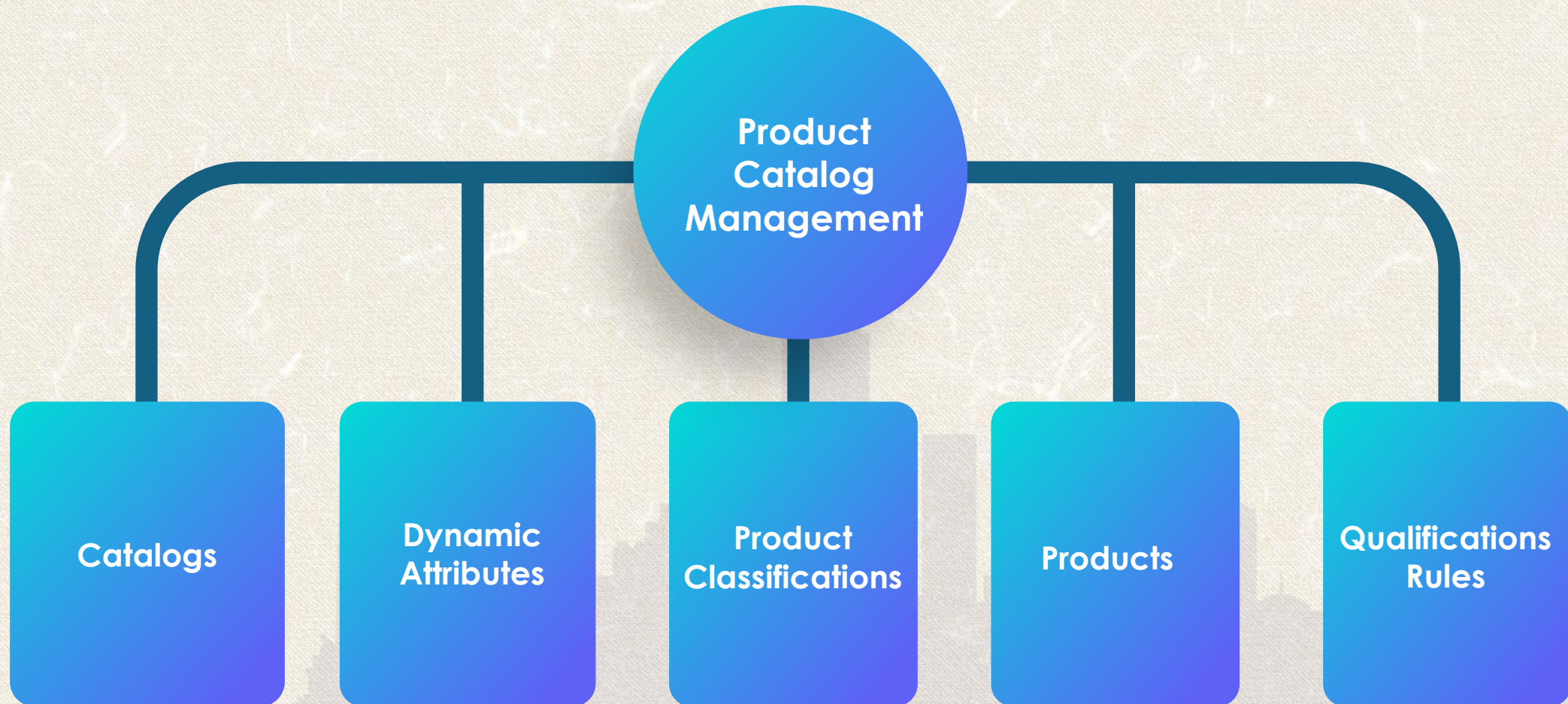




# **Product Catalog Management (PCM) & Salesforce Pricing Overview**



# Product Catalog Management (PCM)

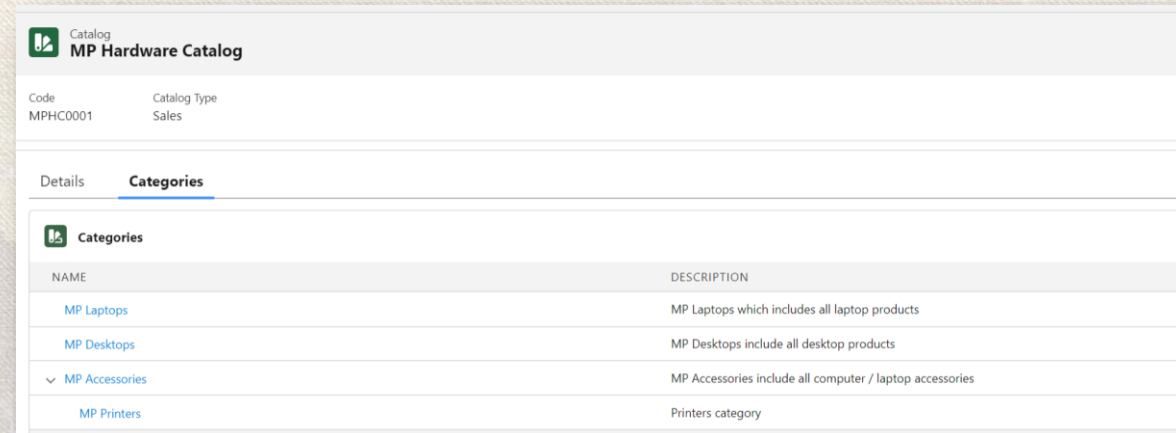




# Catalogs

Catalogs organize products by category and allow for easy browsing.

Catalogs are an important part of managing product data and ensuring that customers can easily find what they are looking for.



The screenshot displays a web interface for the 'MP Hardware Catalog'. At the top, there's a header with the catalog name and a small icon. Below this, a section shows 'Code: MPH0001' and 'Catalog Type: Sales'. The main content area has two tabs: 'Details' and 'Categories', with 'Categories' being the active tab. Under the 'Categories' tab, there's a table with two columns: 'NAME' and 'DESCRIPTION'. The table lists four categories: 'MP Laptops', 'MP Desktops', 'MP Accessories' (which is expanded to show a sub-item 'MP Printers'), and 'MP Printers'.

| MP Hardware Catalog           |                                                          |
|-------------------------------|----------------------------------------------------------|
| Code<br>MPH0001               | Catalog Type<br>Sales                                    |
| <div>Details Categories</div> |                                                          |
| <div>Categories</div>         |                                                          |
| NAME                          | DESCRIPTION                                              |
| MP Laptops                    | MP Laptops which includes all laptop products            |
| MP Desktops                   | MP Desktops include all desktop products                 |
| MP Accessories                | MP Accessories include all computer / laptop accessories |
| MP Printers                   | Printers category                                        |



# Attributes

## Define Once, & Reuse

Define an attribute once and use it with multiple products in the catalog.

## Accelerate Configuration

Assign complementary attributes to Attribute Groups to speed up product configuration.

## Organize Attributes

Attributes can be organized into logical groups called attribute categories.

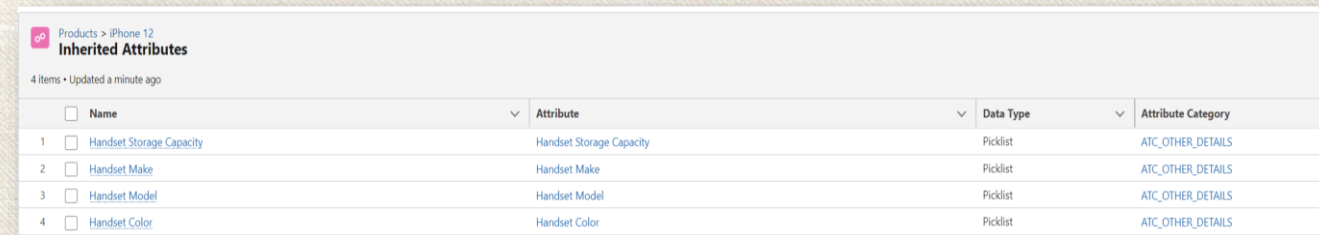
Attributes can be of various types: text, number, date, datetime, checkbox, picklist, currency, and percent.

Attributes can be assigned individually or through attribute categories to product classifications.

## Example

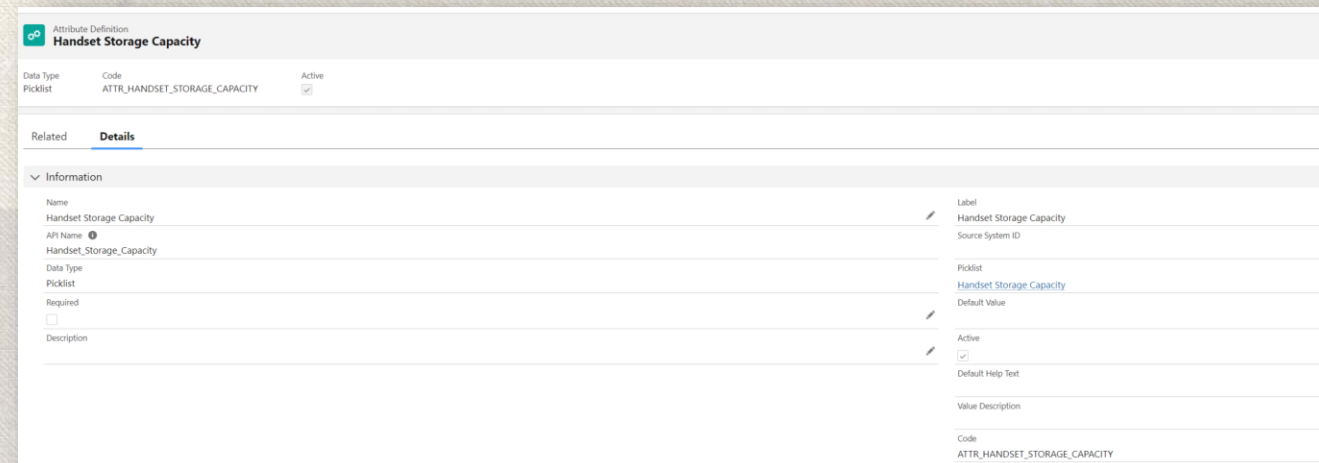
Mobile Phone: Attributes like size, weight, storage capacity, display size, and camera specifications.

Television: Attributes like display type, connectivity, sound output, and smart TV features.



Products > iPhone 12  
**Inherited Attributes**  
4 items • Updated a minute ago

| <input type="checkbox"/>   | Name                                     | Attribute                | Data Type | Attribute Category |
|----------------------------|------------------------------------------|--------------------------|-----------|--------------------|
| 1 <input type="checkbox"/> | <a href="#">Handset Storage Capacity</a> | Handset Storage Capacity | Picklist  | ATC_OTHER_DETAILS  |
| 2 <input type="checkbox"/> | <a href="#">Handset Make</a>             | Handset Make             | Picklist  | ATC_OTHER_DETAILS  |
| 3 <input type="checkbox"/> | <a href="#">Handset Model</a>            | Handset Model            | Picklist  | ATC_OTHER_DETAILS  |
| 4 <input type="checkbox"/> | <a href="#">Handset Color</a>            | Handset Color            | Picklist  | ATC_OTHER_DETAILS  |



Attribute Definition  
**Handset Storage Capacity**

Data Type: Picklist | Code: ATTR\_HANDSET\_STORAGE\_CAPACITY | Active: ☒

Related: Details

Information

|             |                          |                   |                                          |
|-------------|--------------------------|-------------------|------------------------------------------|
| Name        | Handset Storage Capacity | Label             | Handset Storage Capacity                 |
| API Name    | Handset_Storage_Capacity | Source System ID  |                                          |
| Data Type   | Picklist                 | Picklist          | <a href="#">Handset Storage Capacity</a> |
| Required    | <input type="checkbox"/> | Default Value     |                                          |
| Description |                          | Active            | <input checked="" type="checkbox"/>      |
|             |                          | Default Help Text |                                          |
|             |                          | Value Description |                                          |
|             |                          | Code              | ATTR_HANDSET_STORAGE_CAPACITY            |



# Product Classifications

A product classification is a template that you can use to quickly define and create products. Product classifications hold a collection of dynamic attributes. They can be reused to create multiple products that are similar yet different.

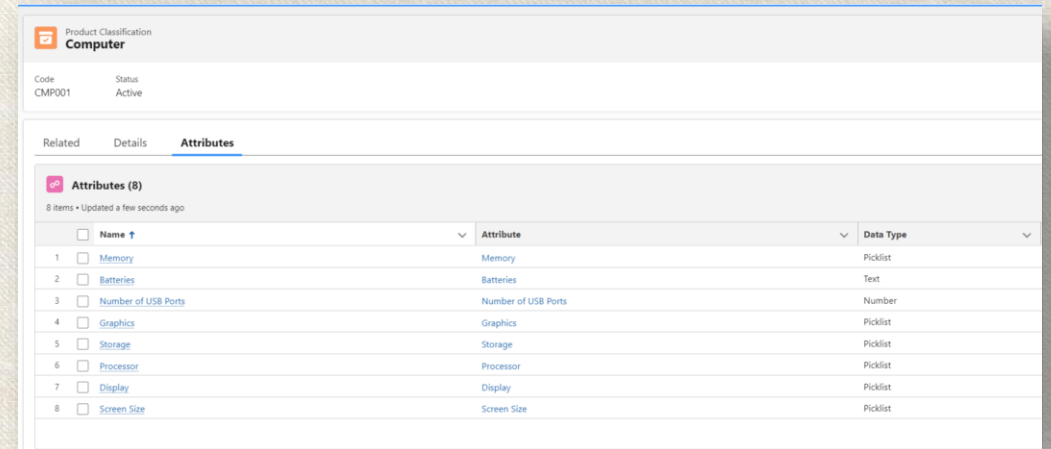
## Example:

TechStore sells various models of laptops and tablets. These products share characteristics such as operating system, processor, RAM, storage, and screen size.

TechStore has a large number of laptop and tablet models. Creating each model one by one can be time-consuming. Let's see how TechStore can quickly create all their models by using Product Classifications.

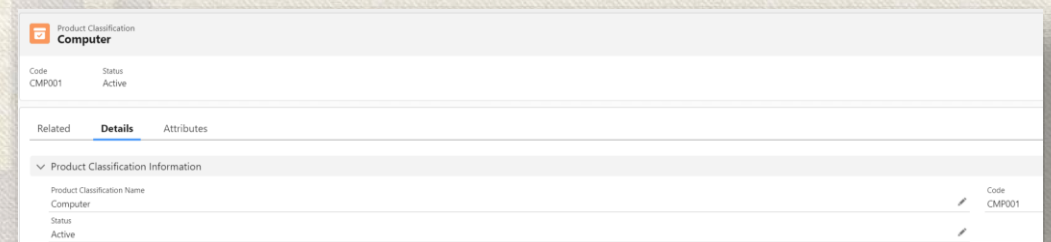
TechStore can create two product classifications — Laptops and Tablets. Each classification can have these attributes:

- Operating System
- Processor
- RAM
- Storage
- Screen Size
- Battery Life
- Connectivity Options



The screenshot shows the 'Attributes' tab for a product classification named 'Computer'. It displays a table with 8 attributes, each with a checkbox, a name, an attribute value, and a data type. The attributes are: Memory (Picklist), Batteries (Text), Number of USB Ports (Number), Graphics (Picklist), Storage (Picklist), Processor (Picklist), Display (Picklist), and Screen Size (Picklist).

| <input type="checkbox"/> | Name                | Attribute           | Data Type |
|--------------------------|---------------------|---------------------|-----------|
| <input type="checkbox"/> | Memory              | Memory              | Picklist  |
| <input type="checkbox"/> | Batteries           | Batteries           | Text      |
| <input type="checkbox"/> | Number of USB Ports | Number of USB Ports | Number    |
| <input type="checkbox"/> | Graphics            | Graphics            | Picklist  |
| <input type="checkbox"/> | Storage             | Storage             | Picklist  |
| <input type="checkbox"/> | Processor           | Processor           | Picklist  |
| <input type="checkbox"/> | Display             | Display             | Picklist  |
| <input type="checkbox"/> | Screen Size         | Screen Size         | Picklist  |



The screenshot shows the 'Details' tab for a product classification named 'Computer'. It displays a table with product classification information, including the name, status, and code.

| Product Classification Information |          |
|------------------------------------|----------|
| Product Classification Name        | Computer |
| Status                             | Active   |
| Code                               | CMP001   |



# Products

## Product Types and Configuration

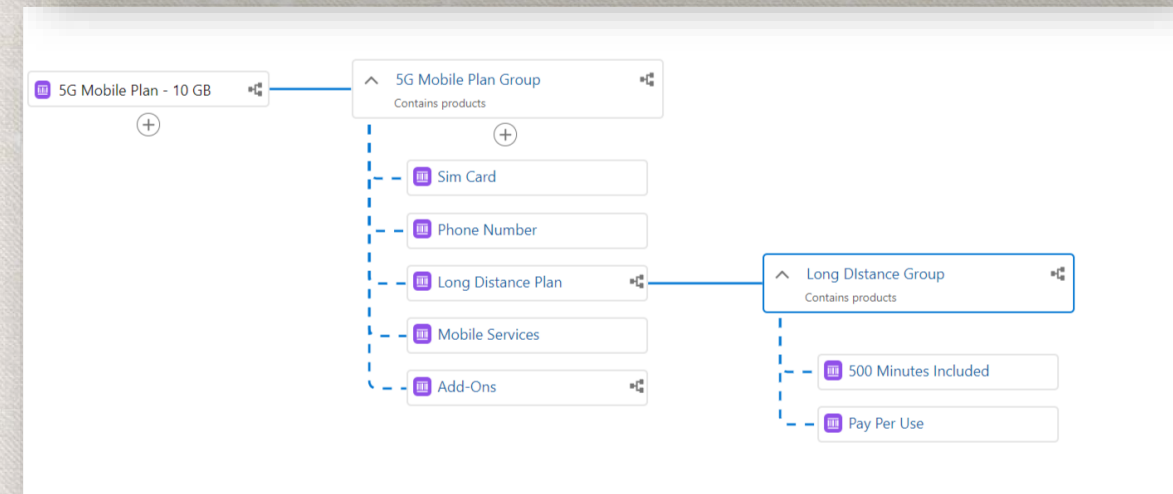
### Simple Products:

- Static Simple Product:
  - Example: Hazelnut flavored instant coffee.
- Configurable Simple Product:
  - Example: French roast coffee grounds (medium or dark roast).
- Field Indicators:
  - Product Type set to 'None'.
  - Configure During Sale indicates if configurable.

### Bundled Products:

- Static Product Bundle:
  - Example: Travel kit with fixed components.
- Configurable Product Bundle:
  - Example: Laptop with optional components (extended warranty, wireless headphones).
- Field Indicators:
  - Product Type set to 'Bundle'.
  - Configure During Sale indicates if configurable.

The screenshot shows the 'Product Cloud Storage' details page. At the top, there's a header with the product name 'Cloud Storage'. Below this, there are tabs for 'Related', 'Details', 'Attributes', and 'Structure', with 'Details' being the active tab. The 'Details' section contains the following information: Product Name: Cloud Storage; Product Description: Cloud computing model that enables storing data and files on the internet through a cloud computing; Product Code: CS001; Based On: Cloud Storage (a link); Product Type: (empty); Specification Type: Commercial; and a checkbox for 'Sell only with other products' which is currently unchecked.





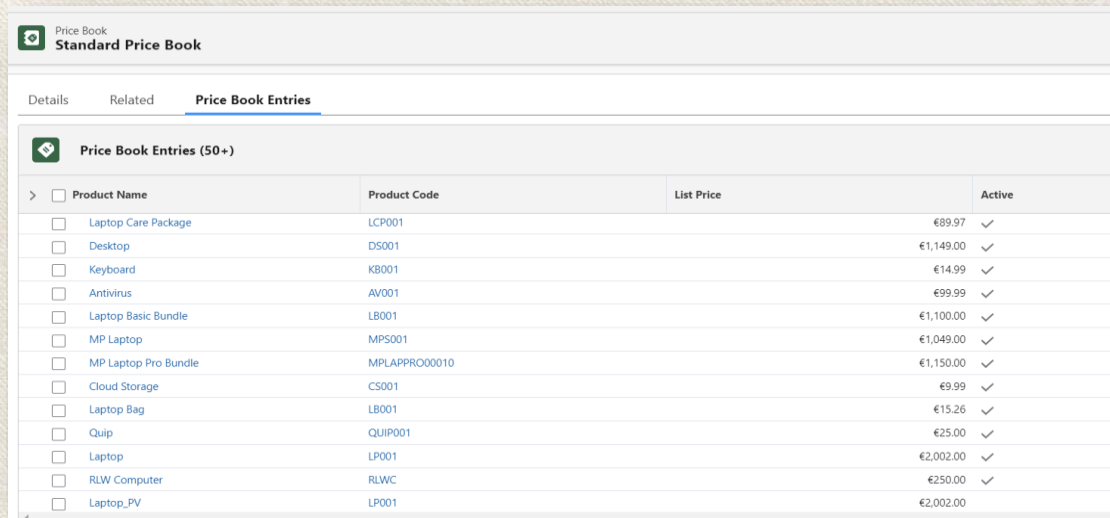
# Salesforce Pricing





# Price Book & Cost book

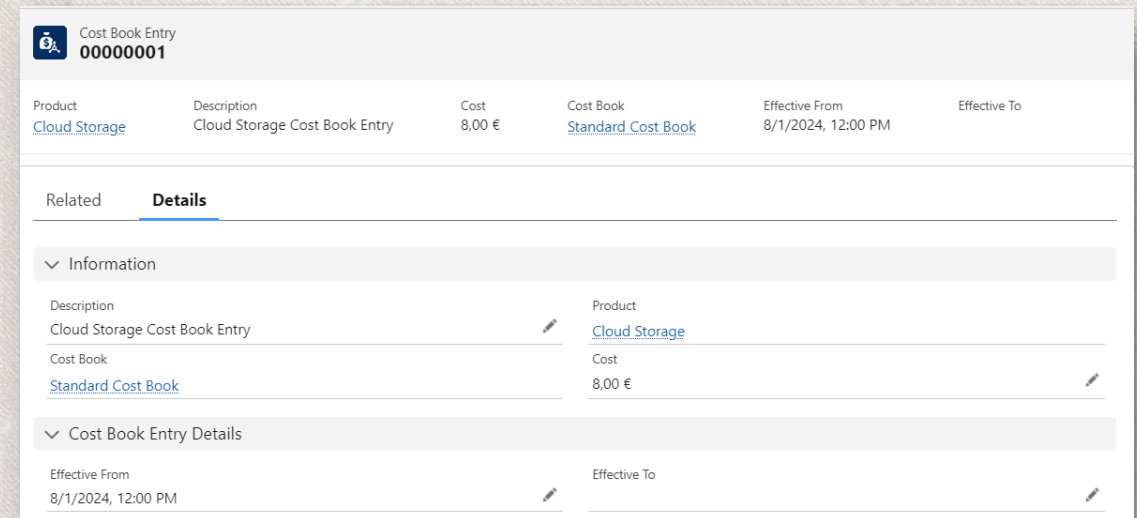
- **Price Book:** Records the product and its selling price.



The screenshot shows the 'Standard Price Book' interface. It has tabs for 'Details', 'Related', and 'Price Book Entries'. The 'Price Book Entries' tab is active, displaying a table of 50+ entries. Each entry includes a checkbox, a product name, a product code, a list price, and an active status indicator.

| <input type="checkbox"/> | Product Name         | Product Code  | List Price | Active |
|--------------------------|----------------------|---------------|------------|--------|
| <input type="checkbox"/> | Laptop Care Package  | LCP001        | €89.97     | ✓      |
| <input type="checkbox"/> | Desktop              | DS001         | €1,149.00  | ✓      |
| <input type="checkbox"/> | Keyboard             | KB001         | €14.99     | ✓      |
| <input type="checkbox"/> | Antivirus            | AV001         | €99.99     | ✓      |
| <input type="checkbox"/> | Laptop Basic Bundle  | LB001         | €1,100.00  | ✓      |
| <input type="checkbox"/> | MP Laptop            | MPS001        | €1,049.00  | ✓      |
| <input type="checkbox"/> | MP Laptop Pro Bundle | MPLAPPRO00010 | €1,150.00  | ✓      |
| <input type="checkbox"/> | Cloud Storage        | CS001         | €9.99      | ✓      |
| <input type="checkbox"/> | Laptop Bag           | LB001         | €15.26     | ✓      |
| <input type="checkbox"/> | Quip                 | QUIP001       | €25.00     | ✓      |
| <input type="checkbox"/> | Laptop               | LP001         | €2,002.00  | ✓      |
| <input type="checkbox"/> | RLW Computer         | RLWC          | €250.00    | ✓      |
| <input type="checkbox"/> | Laptop_PV            | LP001         | €2,002.00  | ✓      |

- **Cost Book:** Tracks expenses associated with creating a product or fulfilling a service.



The screenshot shows the 'Cost Book Entry' interface for entry 00000001. It displays fields for Product, Description, Cost, Cost Book, Effective From, and Effective To. Below these fields, there are sections for 'Information' and 'Cost Book Entry Details'.

| Product                       | Description                   | Cost   | Cost Book                          | Effective From     | Effective To |
|-------------------------------|-------------------------------|--------|------------------------------------|--------------------|--------------|
| <a href="#">Cloud Storage</a> | Cloud Storage Cost Book Entry | 8,00 € | <a href="#">Standard Cost Book</a> | 8/1/2024, 12:00 PM |              |

| Information                        |                               |
|------------------------------------|-------------------------------|
| Description                        | Product                       |
| Cloud Storage Cost Book Entry      | <a href="#">Cloud Storage</a> |
| Cost Book                          | Cost                          |
| <a href="#">Standard Cost Book</a> | 8,00 €                        |

| Cost Book Entry Details |              |
|-------------------------|--------------|
| Effective From          | Effective To |
| 8/1/2024, 12:00 PM      |              |



# Decision Tables

**Decision Tables** are a structured approach to defining business rules and logic for pricing and discounting decisions. They consist of input conditions and corresponding actions, enabling clear and efficient rule implementation.

**For example**, a Decision Table can specify volume discounts based on purchase quantities, such as offering a 10% discount for orders of 100 units or more.

The screenshot displays the 'Setup > Decision Tables' interface for 'Volume Discount Entries'. It includes a header with a gear icon, a status bar showing 'Object: Price Adjustment Tier', 'Status: Active', and 'Last Refreshed Date: 08/07/2024, 04:22 PM'. The main content is divided into three sections: 'Details', 'Input Fields', and 'Output Fields'.

**Details Section:**

|                     |                                      |                                                                |                       |
|---------------------|--------------------------------------|----------------------------------------------------------------|-----------------------|
| Name                | Volume Discount Entries              | Object                                                         | Price Adjustment Tier |
| API Name            | Price_Adjustment_Tier_Decision_Table | Description                                                    |                       |
| Created By          | Automated Process                    | Created On                                                     | 07/12/2024, 03:16 PM  |
| Last Refreshed Date | 08/07/2024, 04:22 PM                 | Status                                                         | Active                |
| Filter Result By    | Output Order                         | Data Source Type                                               | Single sObject        |
| Usage Type          | Pricing                              | <input checked="" type="checkbox"/> Use null as a lookup value |                       |

**Input Fields Section:**

Logic: All conditions are met (AND): 1 AND 2 AND 3 AND 4 AND 5 AND 6 AND 7  
Grouped by - PriceAdjustmentScheduleId

| Serial Number | Field Name ↑              | Input Type | Data Type     | Operator         |
|---------------|---------------------------|------------|---------------|------------------|
| 1             | PriceAdjustmentScheduleId | Required   | Master-Detail | Equals           |
| 2             | LowerBound                | Optional   | Number        | Greater Or Equal |
| 3             | UpperBound                | Optional   | Number        | Less Or Equal    |
| 4             | Product2Id                | Required   | Lookup        | Equals           |
| 5             | ProductSellingModelId     | Required   | Lookup        | Equals           |
| 6             | EffectiveFrom             | Optional   | Date/Time     | Greater Or Equal |
| 7             | EffectiveTo               | Optional   | Date/Time     | Less Than        |

**Output Fields Section:**

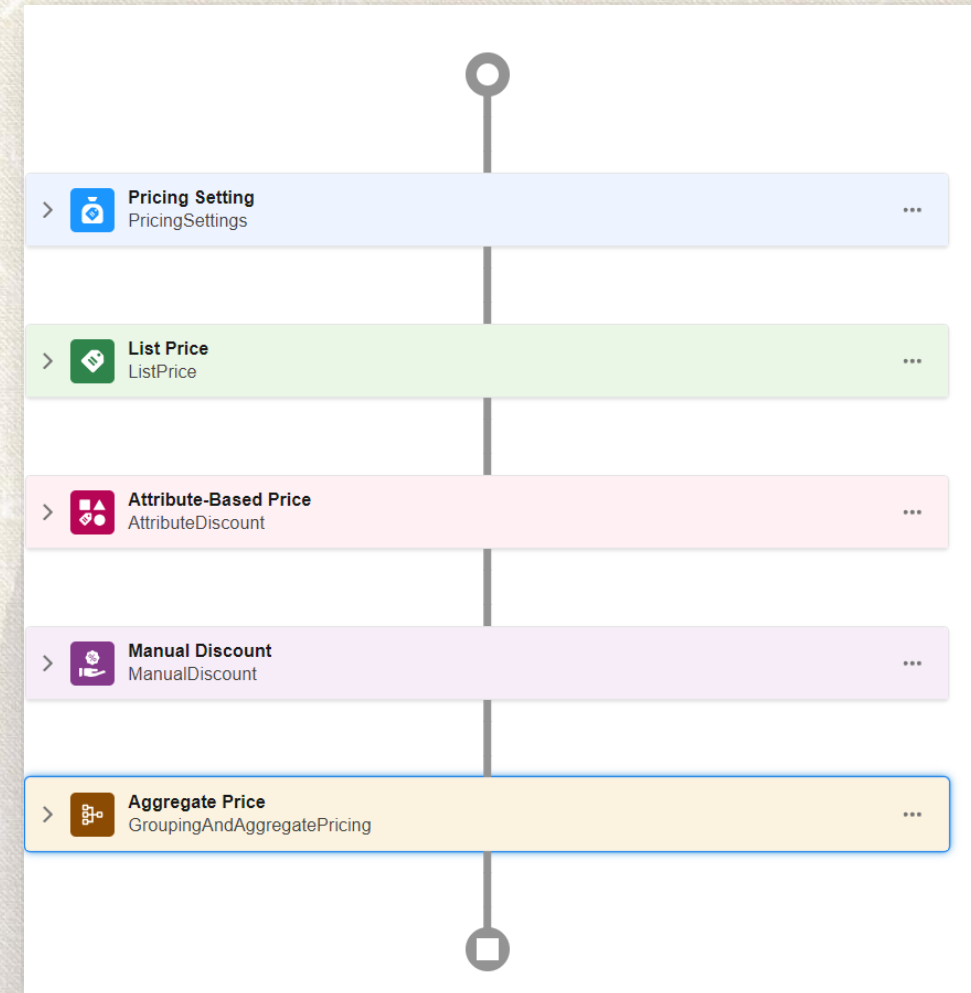
| Field Name ↑ | Data Type |
|--------------|-----------|
| TierType     | Picklist  |
| TierValue    | Number    |



# Pricing Procedure

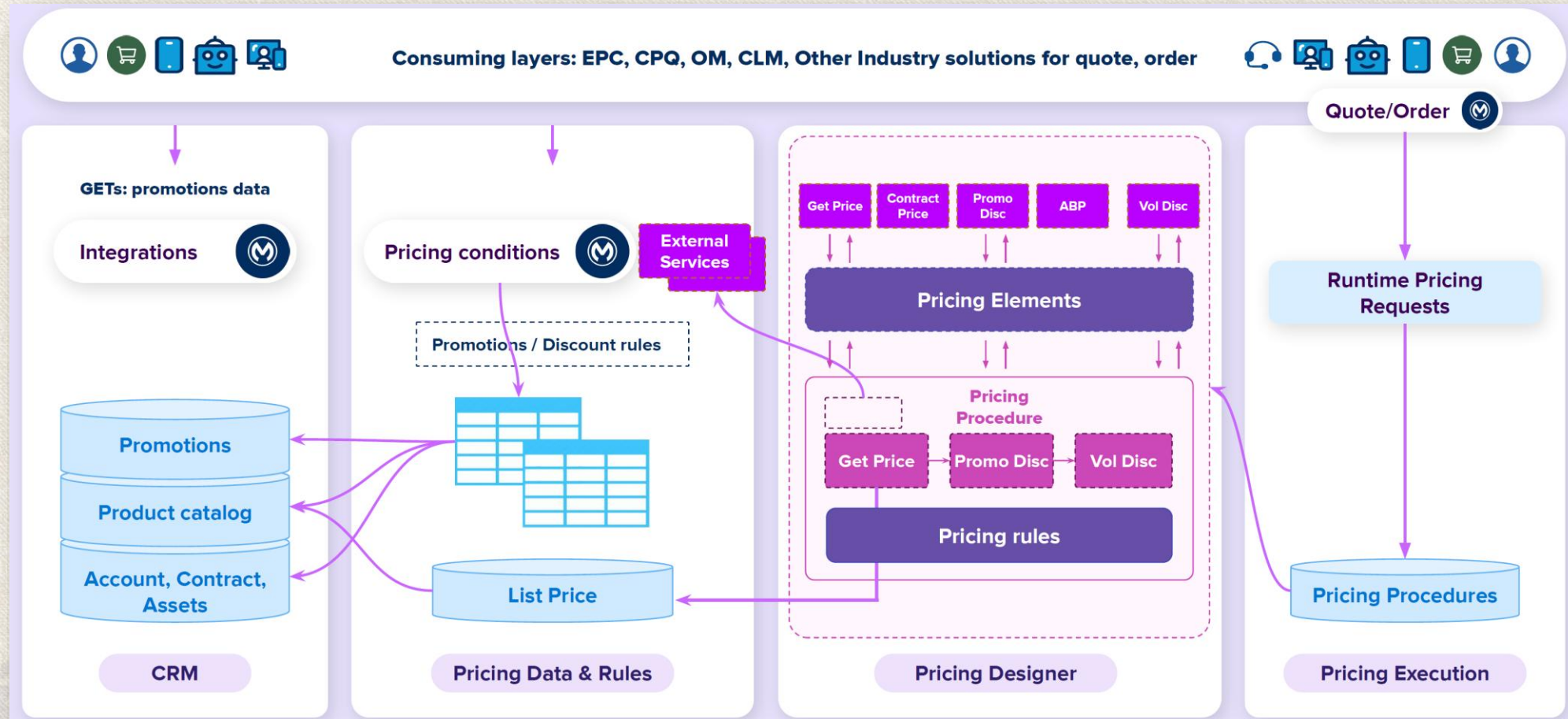
Pricing Procedures define the pricing logic used within CPQ

- Customizable, ordered stacks of pricing elements used to calculate the final net price.
- Uses the Pricing Procedure Builder to create and manage complex pricing rules.





# Salesforce Pricing Architecture



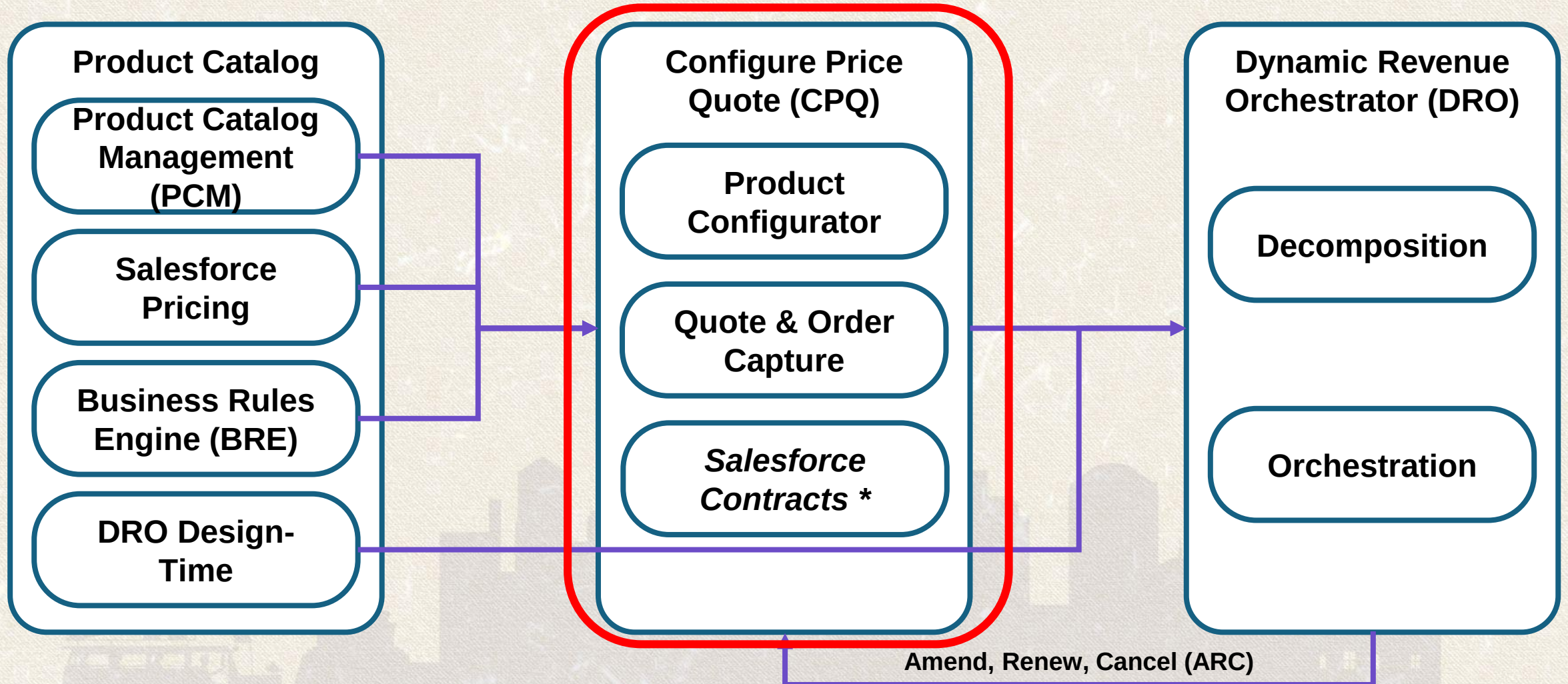




# **Configure Price Quote (CPQ) & Dynamic Revenue Orchestrator (DRO) Overview**



# Revenue Cloud





# CPQ

## Product Configurator

### Instant Pricing

Prices are calculated and updated in real time with each selection



### Configuration Summary Overview

See an overview of all selections made along with the price breakdown for each



### Real Time Product Validation

Product/attribute selections are validated in real time



### Actionable Error Messages.

Click a message to quickly & easily resolve configuration errors



### Customizable Templates

Easily build and customize configurator templates in Flow Builder. Drag & drop components into templates and preview as you go.



### Preview & Assign Templates

Determine which templates products should use and preview how the configurator will appear to end users



### Configuration Rules

Define rules to facilitate configuration for end users





# Product Configurator

- The **Product Configurator** for Revenue Cloud empowers you to customize products to meet specific business needs. Whether you're adjusting components or fine-tuning attributes, it helps you create a product that aligns with customer expectations. The user-friendly interface simplifies the process of selecting the right combination of features, whether for simple bundles or complex configurations.
- Sales teams benefit from instant validation of product selections and real-time pricing updates, making the configurator an invaluable asset for businesses offering complex products. It not only saves time and reduces errors but also significantly enhances the overall customer experience by delivering tailored solutions efficiently and accurately.

The screenshot displays the 'Configure 5G Mobile Plan - 10 GB' interface. The main configuration area on the left includes sections for 'Contract Details' (Contract Term: 1 Year), '5G Mobile Plan Group', and a list of add-ons: 'Add-Ons', 'Long Distance Plan', 'Mobile Services', 'Phone Number', and 'Sim Card'. Each add-on has a checkbox, a purchasing option dropdown (set to 'EUR @ Evergreen - Monthly'), and a quantity input field (set to 1). The top right shows a price of €100.00. The right sidebar contains a 'Summary' section with a table listing the components and their net amounts: '5G Mobile Plan - 10 GB' (€100.00), 'Add-Ons' (€0.00), 'Long Distance Plan' (€0.00), 'Pay Per Use' (€0.00), 'Mobile Services' (€0.00), and 'Phone Number' (€0.00). The bottom right shows the 'One Time Total' and 'Monthly Total' as €0.00. At the bottom of the interface are 'Cancel' and 'Save & Exit' buttons.



# Product Configurator & Flow

## Purpose-Built Components for a Seamless Configuration Experience powered by flow builder:

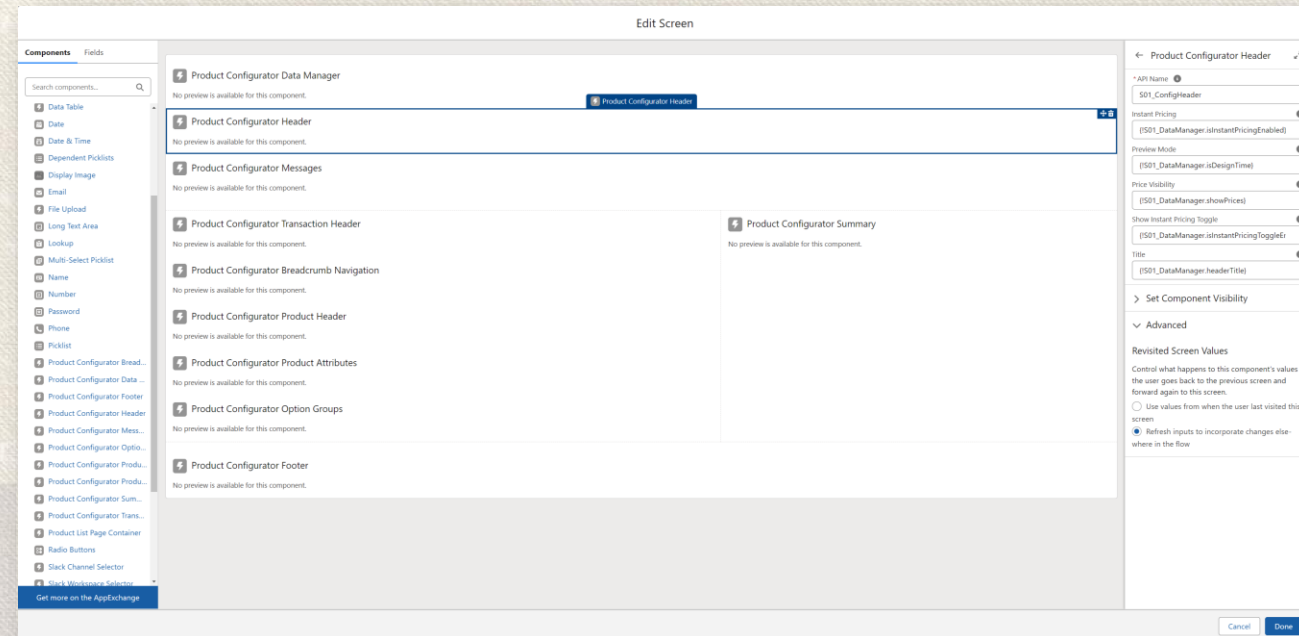
**Product Header:** Serves as the main header for the product being configured, displaying essential details and providing context throughout the configuration process.

**Product Attributes:** Allows users to select and customize attributes specific to the product, ensuring a tailored configuration that meets specific needs.

**Pricing Summary:** Offers a real-time overview of the total cost, reflecting changes in selections and providing a clear breakdown of pricing components.

**Data Manager:** An invisible Flow component where config data is mapped between the UI and the source context definition.

These components together form the Configurator template UI, providing a cohesive and intuitive user experience.





# Product Configurator UI

## Configuring Products: Simple and Bundled

- **View Default Options:** Examine default options within option groups.
- **Update Quantity:** Adjust the quantity for each product within the bundle.
- **View Default Values:** Check default attribute values at both the parent and option levels.
- **Select Attributes:** Customize attributes at the parent bundle level and within individual options.

The screenshot displays the 'Configure 5G Mobile Plan - 10 GB' interface. It features a top navigation bar with 'Product Validation', 'Instant Pricing', and 'Summary' tabs. A warning message at the top states: 'Prices don't reflect the latest selections. To get the latest pricing, enable Instant Pricing or click Update Prices.' Below this, a 'Messages (2)' section contains two alerts: 'One or more attributes for product Sim Card are missing. Specify these attributes and try again: ICCID, IMSI, Type.' and 'One or more attributes for product Mobile Services are missing. Specify these attributes and try again: Caller ID, Voice Mail, Call Waiting.' The main configuration area is divided into 'Contract Details' and 'Mobile Plan Details'. The 'Mobile Plan Details' section includes dropdowns for 'In-Bucket Speed' (512 kbps), 'Included Data' (Unlimited Domestic), 'Out-Of-Bucket Speed' (512 kbps), 'SMS/MMS' (Unlimited Domestic), and 'Voice' (Unlimited Domestic). Below these are two expandable sections: '5G Mobile Plan Group' and 'Long Distance Plan'. The '5G Mobile Plan Group' section shows a checked 'Add-Ons' option with a quantity of 1 and a purchasing option of 'EUR 0 Evergreen - Monthly'. The 'Long Distance Plan' section shows a checked option with a quantity of 1 and a purchasing option of 'EUR 0 Evergreen - Monthly'. On the right, a 'Summary' section provides a total price of '€100.00' for 'Evergreen - Monthly' with a quantity of 1. It also lists attributes: 'Contract Term 1 Year', 'Out-Of-Bucket Speed 512 kbps', 'SMS/MMS Unlimited Domestic', and 'Voice Unlimited Domestic'. A 'Pay Per Use' section shows a quantity of 1 and a purchasing option of 'EUR 0 Evergreen - Monthly'. A 'Mobile Services' section shows a quantity of 1 and a purchasing option of 'EUR 0 Evergreen - Monthly'. A 'Phone Number' section shows a quantity of 1 and a purchasing option of 'EUR 0 Evergreen - Monthly'.



# Real-Time Pricing & Instant Validation

## Get the Latest Pricing

**Real-Time Updates:** The summary component automatically updates pricing to reflect changes in product selections.

**Manual Price Update:** If instant pricing is off, manually update the price by clicking "Update Price" to ensure accuracy.

## Validate Product Selections Instantly

**Automatic Validation:** Validation rules run automatically with every product modification, ensuring configurations are error-free.

**Manual Validation:** Click "Validate" to manually trigger product validation and address any potential errors before saving.

The screenshot displays the 'Configure 5G Mobile Plan - 10 GB' interface. At the top right, there are two toggle switches: 'Product Validation' (set to 'Off') and 'Instant Pricing' (set to 'On'). The main area is divided into several sections: 'Messages (2)' with warning icons, 'Contract Details' showing a 1-year term, and a '5G Mobile Plan Group' with four add-ons: 'Add-Ons', 'Long Distance Plan', 'Mobile Services', and 'Phone Number'. Each add-on has a 'Purchasing Option' dropdown and a 'Quantity' input. On the right, a 'Summary' section provides a breakdown of costs, including the base plan price, add-on costs, and a 'Monthly Total' of €100.00. At the bottom right, there are three buttons: 'Cancel', 'Validate' (highlighted with a red box), and 'Save & Exit'.



# Third Party Configurator

## Launch External Configurators

### •Integration

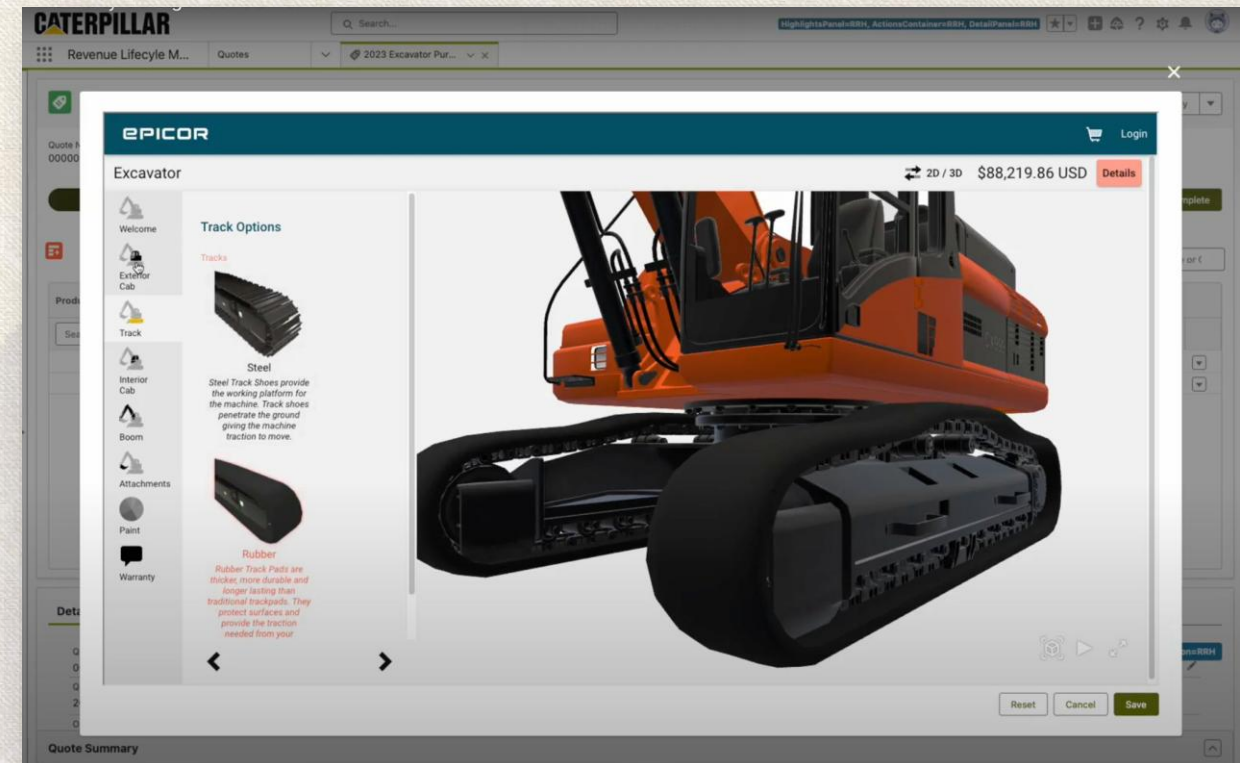
- **Seamless Integration:** Easily integrate with third-party (3P) configurators for a streamlined user experience.

### •Custom Configurator UI Widget

- **Develop Custom Widgets:** ISV vendors can create custom configurator widgets using Lightning Web Components (LWC) platform UI components.

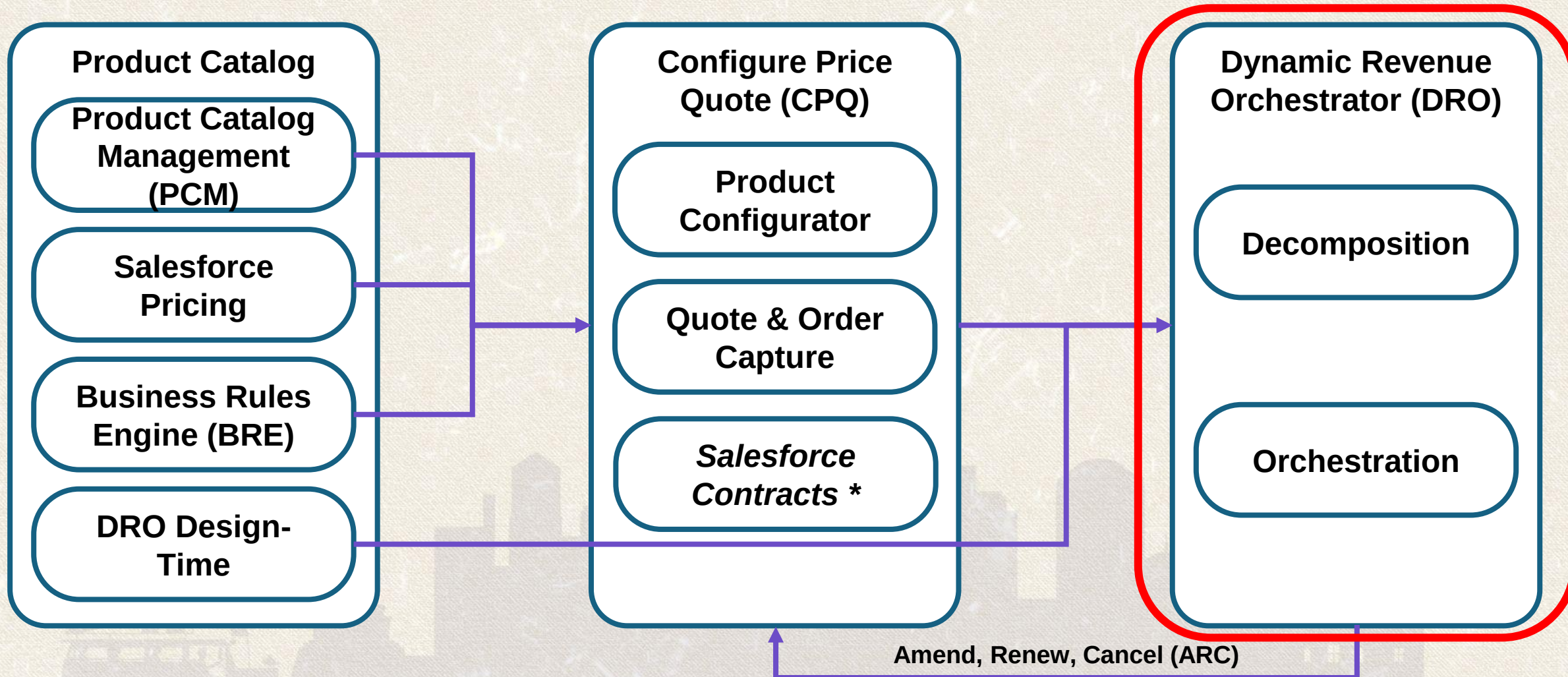
### •Coexistence of 3P and 1P Configurators

- **Flexible Configuration:** Associate specific product classes with an external 3P configurator through Flow template association, allowing for the coexistence of both 3P and first-party (1P) configurators.



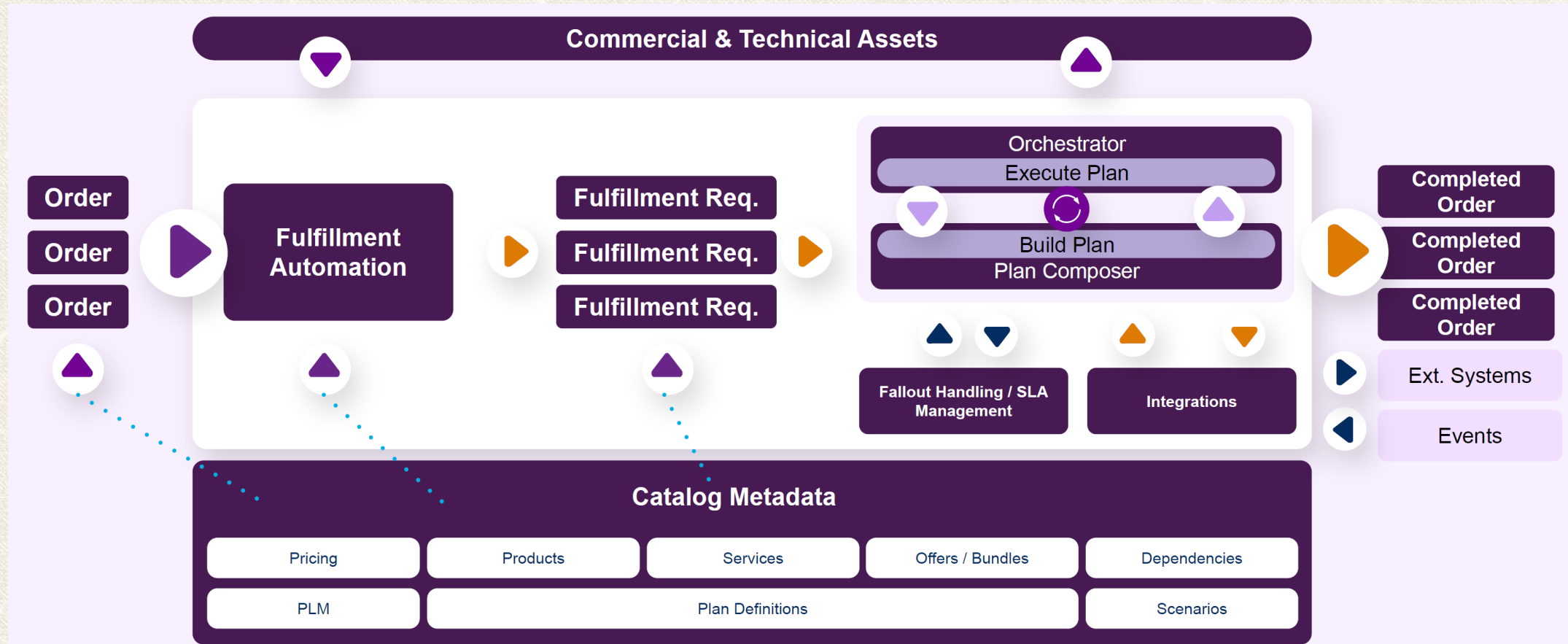


# Revenue Cloud





# DRO Architecture





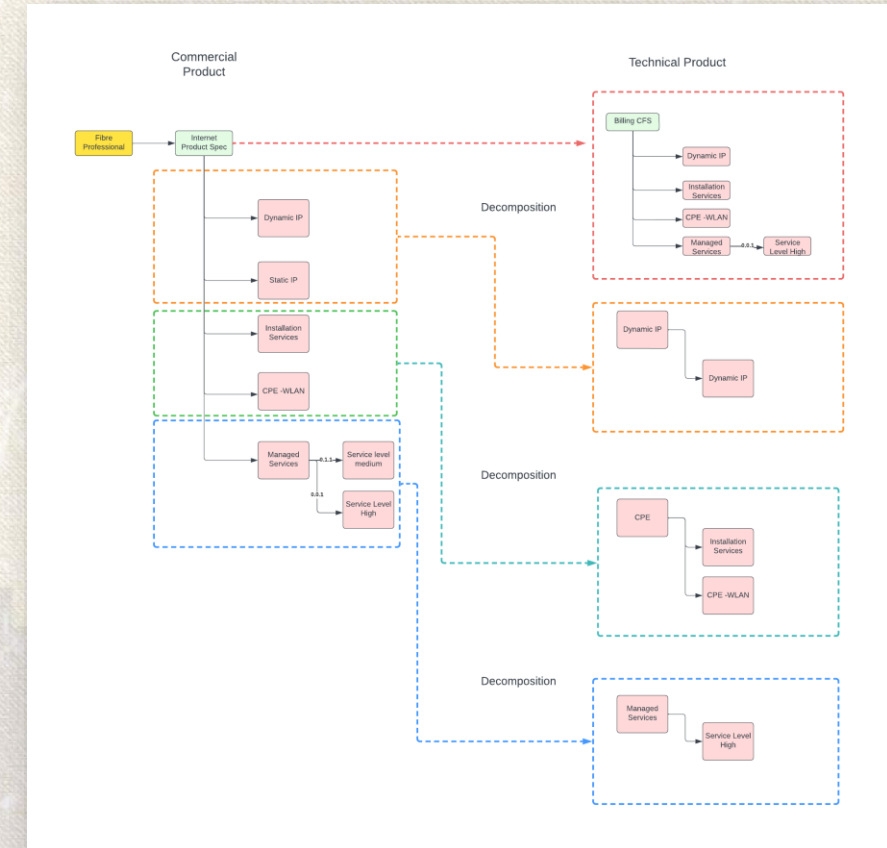
# Decomposition

## What is Decomposition?

- **Decomposition** refers to breaking down a customer order into smaller, manageable steps.
- Decomposition occurs **while** the order is submitted, with specific rules and mappings created for this purpose.
- **Example:** When a customer orders a phone, the process decomposes into tasks such as:
  - Shipping
  - Provisioning a SIM card
  - Checking credit, and more.

## Role of the Fulfillment Designer

- **Fulfillment Designer:** Configures how commercial products (visible to customers) break down into backend fulfillment tasks (not visible to customers).





# Fulfillment Designer

## After Decomposition:

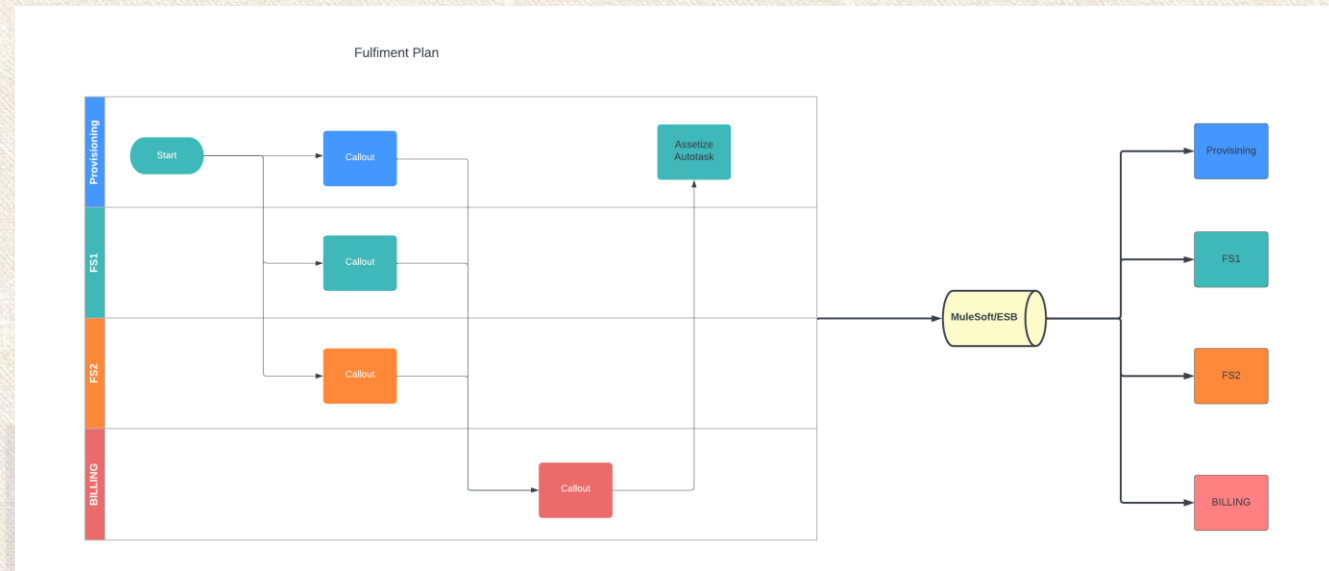
- Once order items are decomposed, **Dynamic Revenue Orchestrator (DRO)** creates the steps required for fulfillment.

## •Fulfillment Designer:

- Defines fulfillment steps, dependencies, and rules **before** the order is submitted.
- Ensures the correct sequence and conditions for the fulfillment steps

## Key Concepts in Fulfillment Design:

- **Fulfillment Steps:** Individual tasks that need to be completed to fulfil an order.
- **Dependencies:** Logical connections between steps to determine their execution order.
- **Conditions:** Rules that control when steps start, pause, or resume during the fulfillment process





# Fulfillment Task Types

## Callout

A task used for Automated API interactions with external fulfillment systems (e.g. Billing, Shipping, Provisioning)

## Pause Event

A task triggered by an attribute / field change on Order Items. Completed when asynchronous updates are received from fulfillment systems

## Auto Task

A task triggered to perform internal processing of data in preparation for a fulfillment system interaction or other internal logic within Salesforce

## Milestone

Represents a point of interest in the fulfillment process (reporting) or for configuring rollback behavior

## Manual Task

Used when user input is needed at a particular place in fulfillment flow. Supports Guided Manual Task resolution via Omniscripts



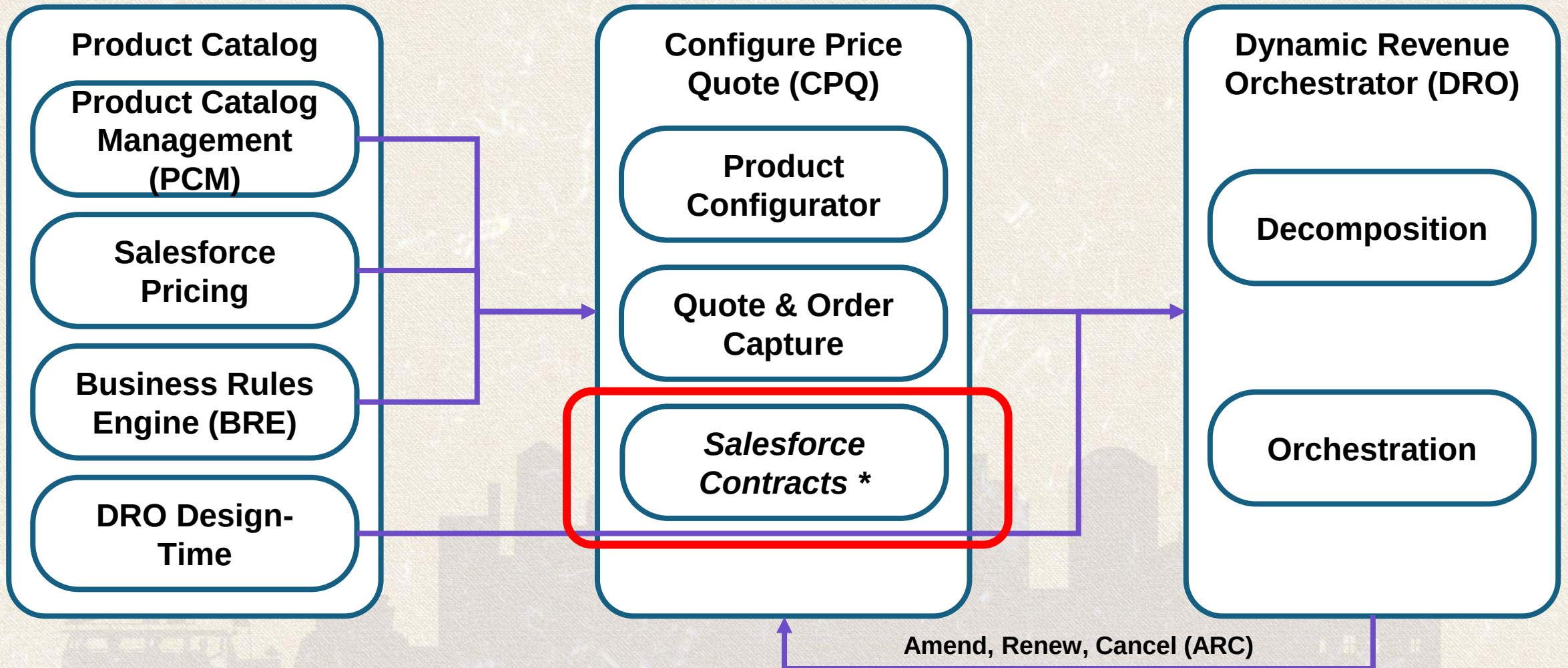


# Salesforce Contracts Overview





# Salesforce Contracts





# Salesforce Contracts

## Contract Lifecycle Management

Contracts Data Model

Integration with CPQ

Contract Types

State Model  
(Transitions & Actions)

Salesforce Approval Process

Contract Document Versioning

Office 365 Connector

E-Signature  
(OOB w/ DocuSign)

Clauses

Obligations

Contracts AI

Pricing (Frame) Agreement

## Document Generation

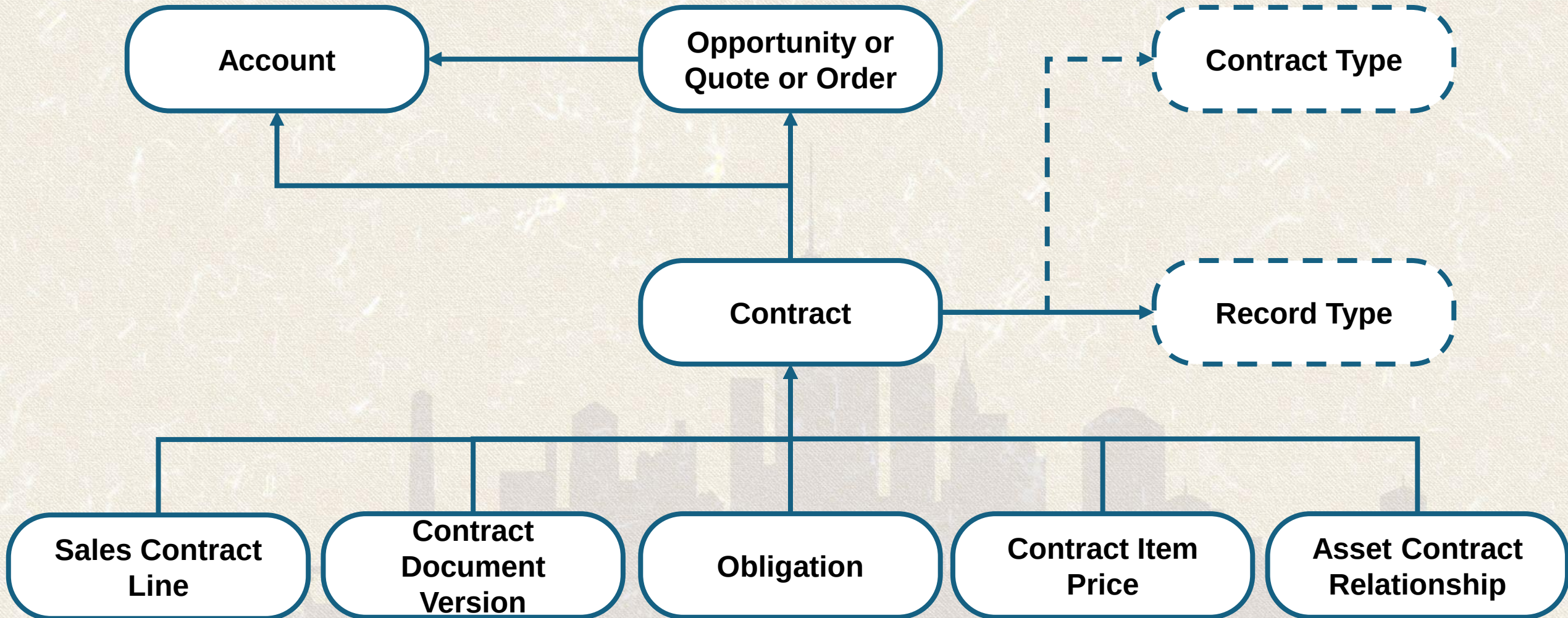
Document Templates

DOCX / PPTX and PDF Files

Omnistudio Data Mappers



# Salesforce Contracts

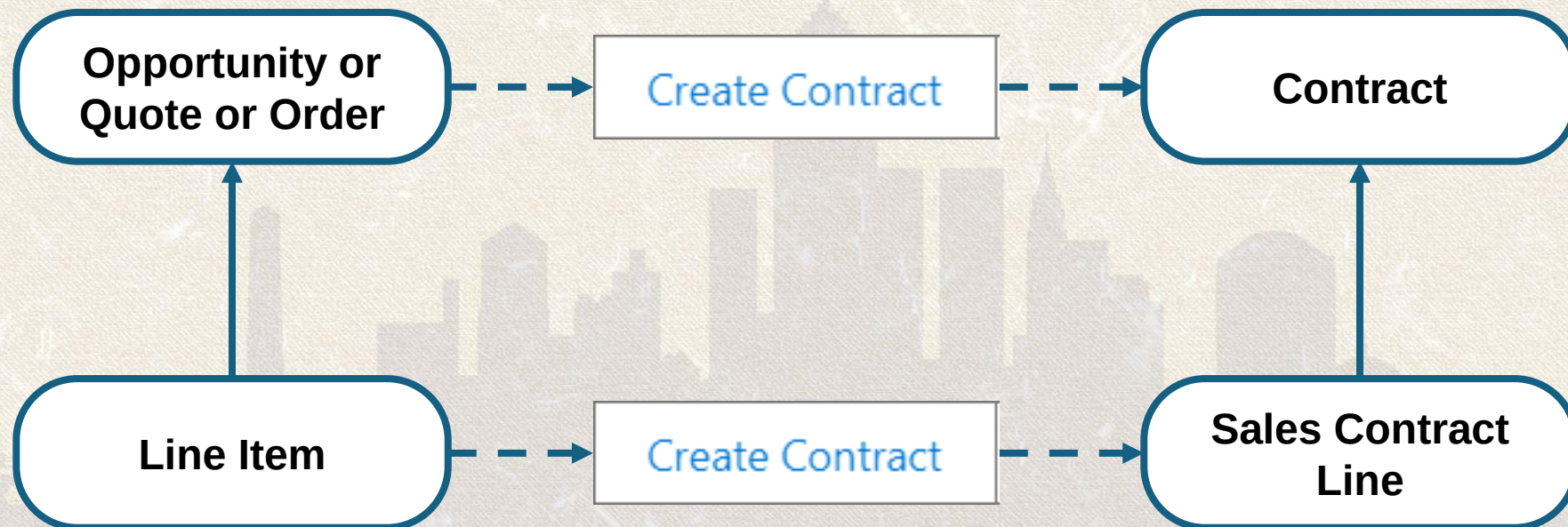




# Salesforce Contracts

Salesforce Contracts integrations with Transaction Management (aka QOCAL or CPQ) via the ability to **create Contracts + Line Items from Opportunities, Quotes, or Orders and their Line Items.**

Assets can also be linked to Contracts to track Usage as part of Usage Management.





# Document Generation

A Document Template is a Word DOCX file containing text, formatting, tables, images, etc – whatever features of Microsoft Word you would like to use, with **merge tokens**.

**Merge tokens** are text in the format of “**{{Node}}**” which will be **replaced with the value of that node from the Omnistudio Data Mapper** at run-time.

For example, “**{{AccountName}}**” in the Document Template will be replaced by “Edge Communications” or whatever the account name of the contract is.







# Revenue Cloud Demo







# Enablement Resources



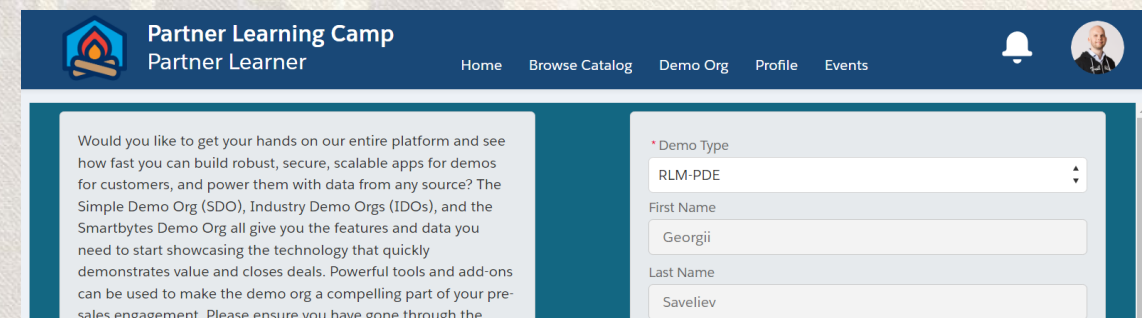
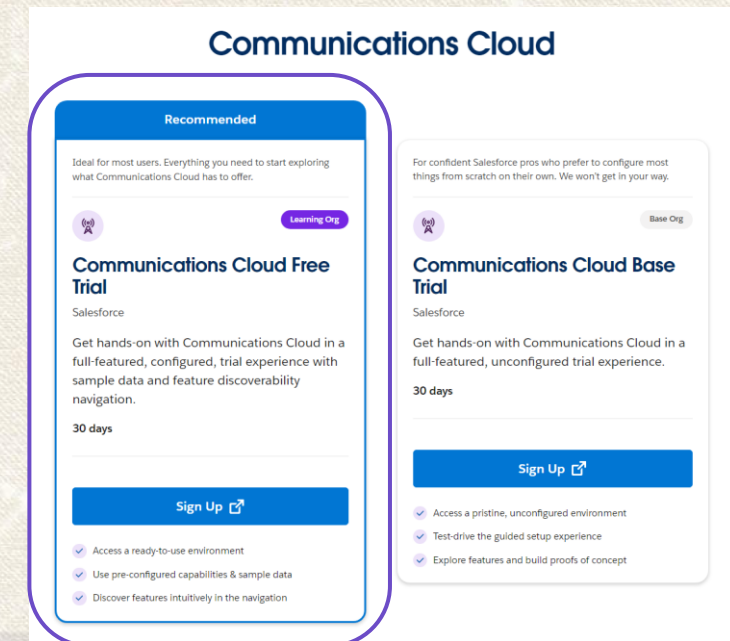
# Get Hands On!

## If you are not a Partner (i.e. End-Customer)

If you are not a Salesforce Partner, go the [Developer Free Trial page](#), choose Communications Cloud, and click Sign Up under Communications Cloud Free Trial (not Base Trial). This has Product Catalog Management (PCM) and Salesforce Pricing with some sample products. DRO and SF Contracts are available but need to be enabled and configured.

## If you are a Partner or Salesforce Employee

If you are a Salesforce Partner or employee, spin up a “RLM-PDE” Demo Org from Partner Learning Camp > Demo Org tab. This has PCM, Pricing, DRO, and Salesforce Contracts, all with sample data (except SF Contracts). Make sure to extend expiration via a Partner Support Case so it doesn’t expire after 1 month! Alternatively, check out the [Trialforce IDs](#) which seem to be the same configuration.



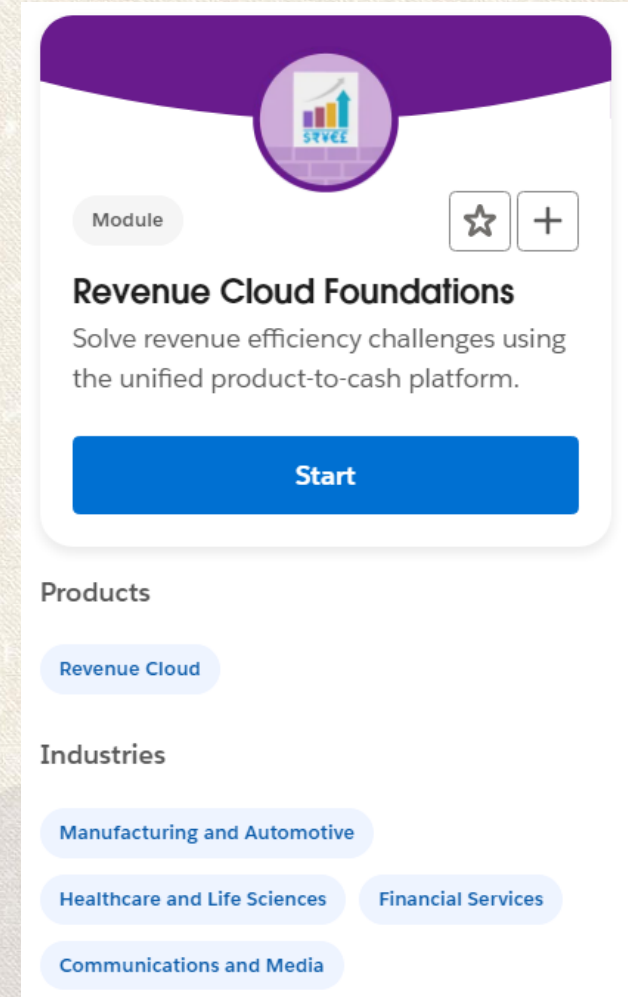


# Enablement Resources

Check out the [Salesforce Help documentation](#)

Check out the Revenue Cloud Foundations module on Trailhead (note the listed industries – interesting!)

For Partners & Salesforce Employees, see the “Getting Hands-On!” section of the [Revenue Cloud Partner Pocket Guide in Partner Community](#) with links to lots of great material



The screenshot shows a Trailhead module card for 'Revenue Cloud Foundations'. At the top is a purple header with a circular icon containing a bar chart and the word 'SFVCE'. Below the header, the word 'Module' is in a grey pill, followed by a star icon and a plus icon. The title 'Revenue Cloud Foundations' is in bold, with a description: 'Solve revenue efficiency challenges using the unified product-to-cash platform.' A large blue 'Start' button is below the description. Under the heading 'Products', there is a blue pill labeled 'Revenue Cloud'. Under the heading 'Industries', there are four blue pills: 'Manufacturing and Automotive', 'Healthcare and Life Sciences', 'Financial Services', and 'Communications and Media'.



# Revenue Cloud Enablement Resources

## Apex Hours

- [Revenue Cloud: PCM & Pricing](#)
- [Revenue Cloud: CPQ & DRO](#)
- [Revenue Cloud: Salesforce Pricing](#)

Follow me, Georgii Saveliev, and Stratus Carta for more Revenue Cloud content!





# Revenue Cloud Enablement Resources

For Omnistudio, check out [Apex Hours' Omnistudio series](#):

- Getting Started with Omnistudio
- Flexcards Basics / Advanced
- Omniscripts Basics / Advanced
- Data Mappers Basics / Advanced
- Integration Procedures Basics / Advanced
- IDX Workbench and CLI
- OmniOut
- Best Practices

Check out the [Salesforce Help documentation](#)

Check out the [Trailhead Trail](#)





# Q&A

