

Revenue Reinvented

Unlocking Growth with
Revenue Cloud



Agenda

- Introductions
- What & Why Revenue Cloud?
- Product Architecture
- Revenue Cloud Modules
- Demo



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Brought you by

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.



What & Why Revenue Cloud?

Challenge?

Disconnected Systems Break the Quote - Cash Process



History First



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.



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.

Revenue Cloud Architecture



Revenue Cloud



CPQ



Contracts



Orders



Billing

Salesforce Platform

Insights

Shedding some light first 💡

If you're diving into Salesforce Revenue Cloud, here's a quick breakdown:

- **Revenue Lifecycle Management (RLM):** the old name - before Dreamforce '24
- **Revenue Cloud:** the old name - before Dreamforce '25
 - **Growth/Advanced/Billing:** different Revenue Cloud SKUs
- **Agentforce Revenue Management:** the current product name

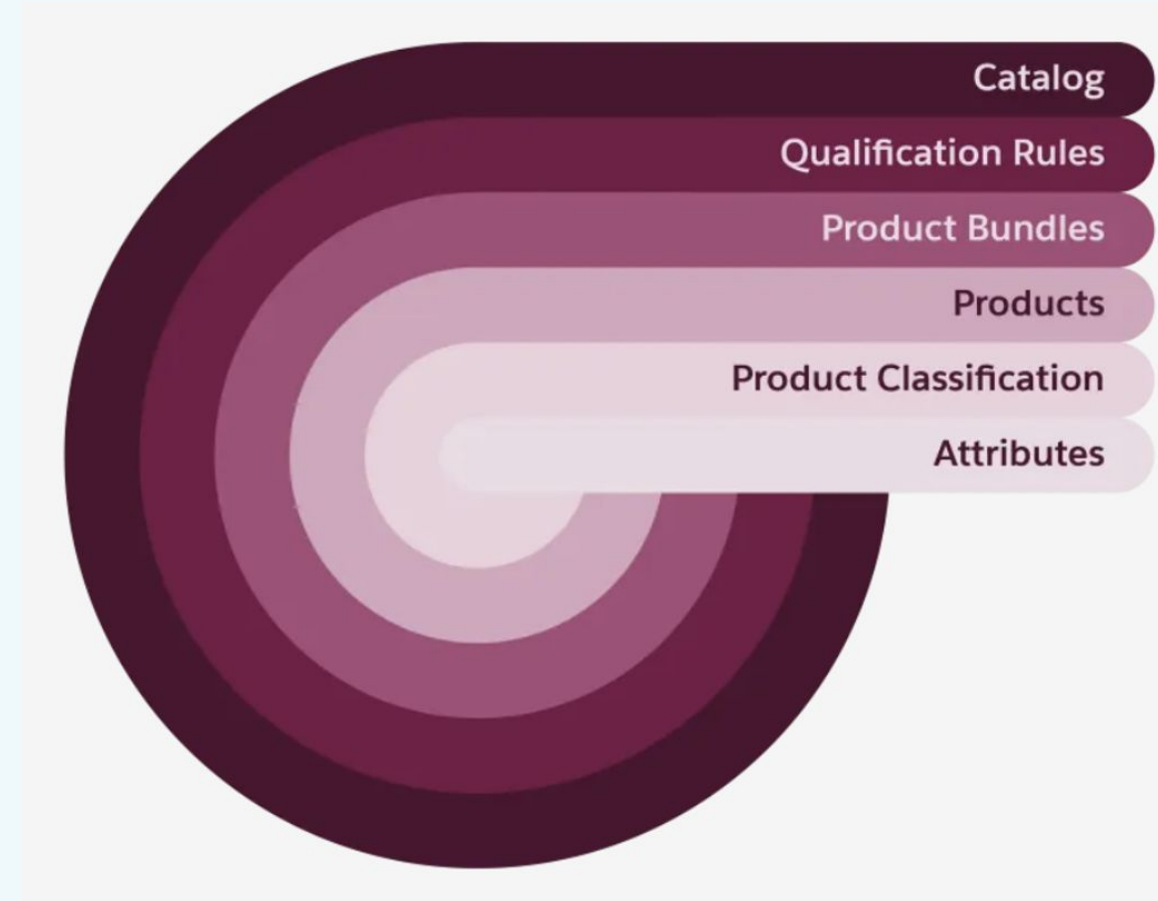
Complete Revenue Platform Powered by Agentforce



Centralized Catalog Management

Build once and deploy on all channels

- **Define:** Products and their attributes.
- **Create:** Reusable product categories to classify products.
- **Build:** Bundles and product offerings.
- **Configure:** Rules to govern product visibility



Centralized Price Management

Control discounting & promotions across all channels and revenue models

- **Price Management:** Define price adjustments, discounts and promotions
- Visual **drag & drop** editor and pre-built pricing elements for volume, tier, attribute pricing
- **Price waterfall:** Understand pricing dynamics



Price Books

Create and organize multiple price books for your products.



Price Adjustment Schedules

Generate unique price adjustment solutions to attract customers and stay ahead.



Pricing Procedures

Create custom pricing procedures to calculate prices for your products.



Products

View all products that are available to your customers.

Constraint Builder

Empowering admins to easily build & maintain configuration that scales

Constraint-Based Configuration: Dynamic, Scalable, Smart

- Dynamic, **real-time** validation
- Faster **time-to-market** for new products
- Reduced **manual** overhead
- Better **scalability** and **performance**

The screenshot displays the Constraint Builder interface, which is divided into two main sections: the CML Editor and the Visual Builder.

CML Editor: This section is used for editing Configuration Management Language (CML) code. It features a sidebar with a 'Types' list containing 'LaptopProBundle', 'Software', 'Laptop', 'Warranty', 'PrinterBundle', 'PrinterPaper', and 'Printer'. The main area shows a code editor with the following CML snippet:

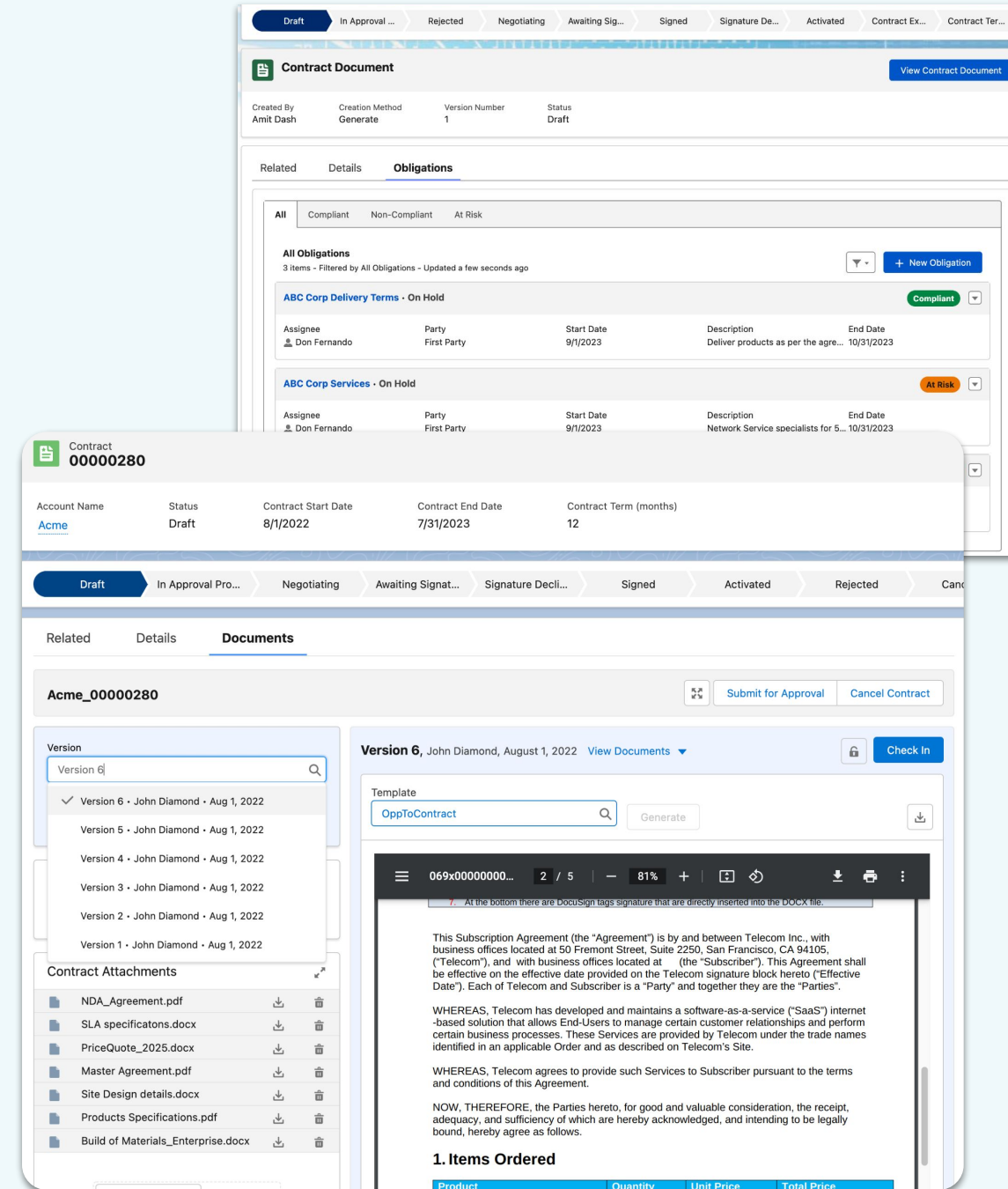
```
1 type LineItem;
2
3 type LaptopProBundle : LineItem {
4   relation software : Software;
5
6   relation laptop : Laptop[1..9999];
7
8   relation warranty : Warranty;
9
10  relation printerbundle : PrinterBundle;
11
12  relation mouse : Mouse;
13
14  constraint(mouse[Mouse].Wireless == true, "Recommendation to make it wireless mouse");
15
16  constraint(laptop[Laptop].Windows_Processor == "Intel Core i9 5.2 GHz" -> laptop[Laptop].
17
18  }
19
```

Visual Builder: This section provides a visual representation of the configuration. It includes a 'Product Index' sidebar with a search bar and an 'Add Item' button. The main area shows a hierarchical tree structure with 'LaptopProBundle' at the top, followed by 'Products'. Below the tree, there are two constraint blocks: 'Conditional Logic Constraint' and 'Basic Logic Constraint', each with a dropdown arrow for configuration options.

Contract Lifecycle Management

Expedite contracts and improve compliance

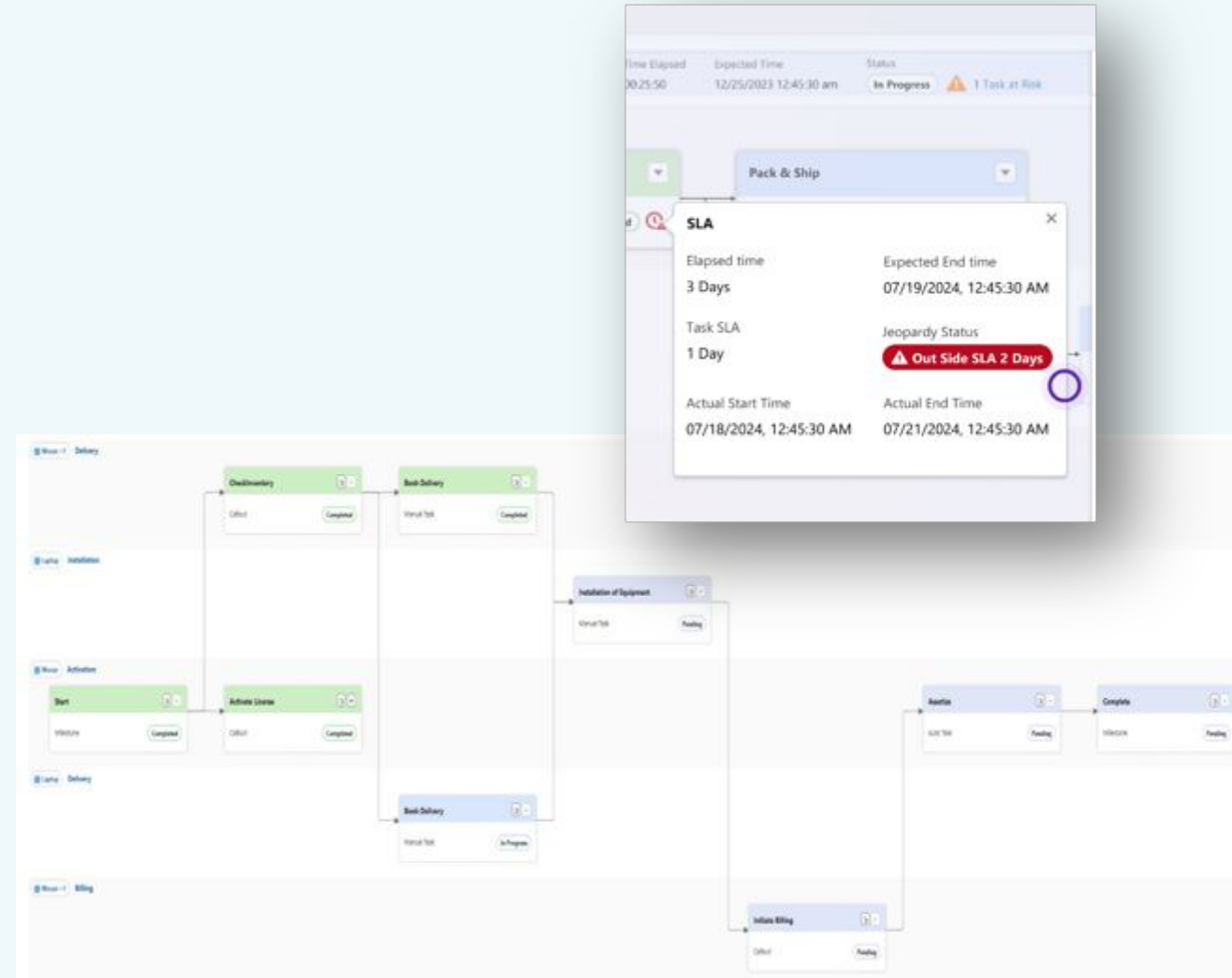
- **Configure & Streamline** the Contracting Lifecycle
- **Centralized** access to contracts and documents
- **Speed Up** Contract Execution With E-Signatures
- Manage **Obligations** and **Clauses**
- Collaborative **Redlining** for Contract Negotiation



Order Management & Orchestration

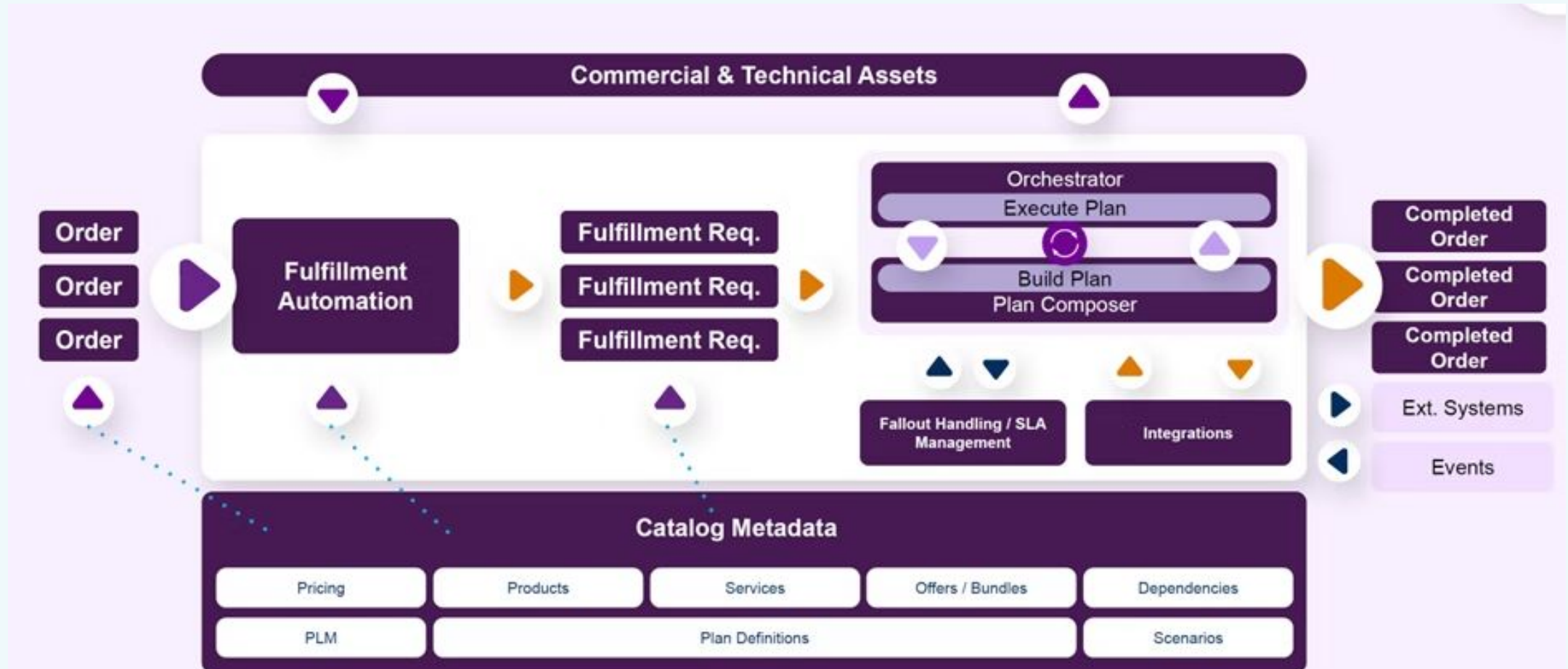
Design and manage processes to automate fulfillment & more!

- Seamless order **orchestration**.
- Define **fulfillment** workspace and fulfillment steps.
- Describe **SLA** and **Jeopardy** Handling.
- Manage **Fallout** Management.



Order Management & Orchestration

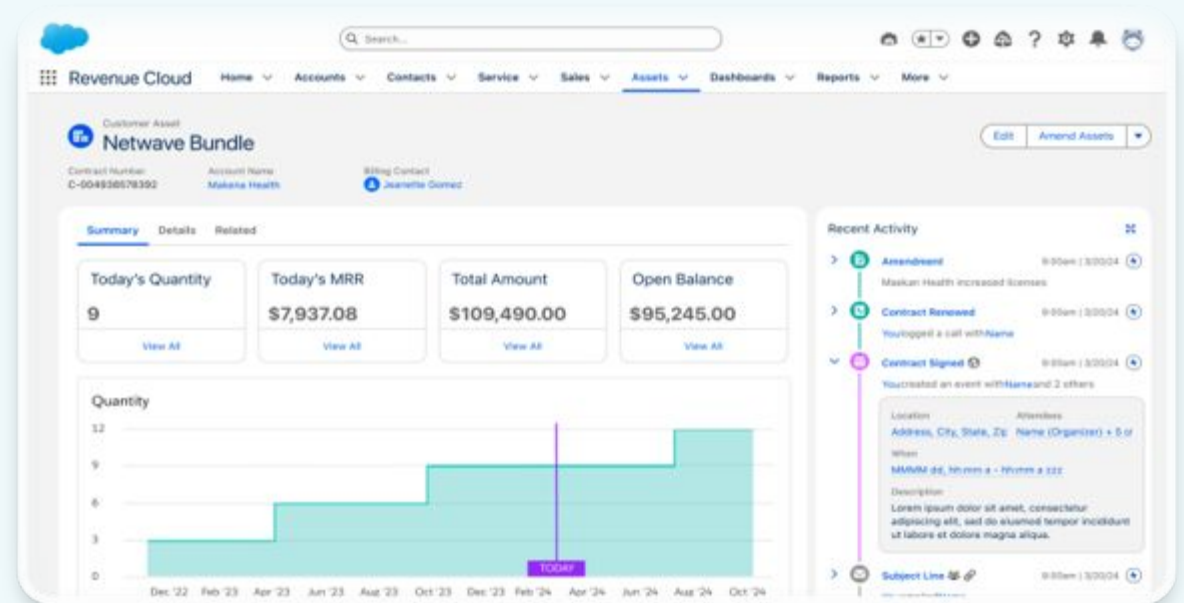
Architecture



Subscription Management

Amend, Renew and Cancel subscriptions across the lifecycle

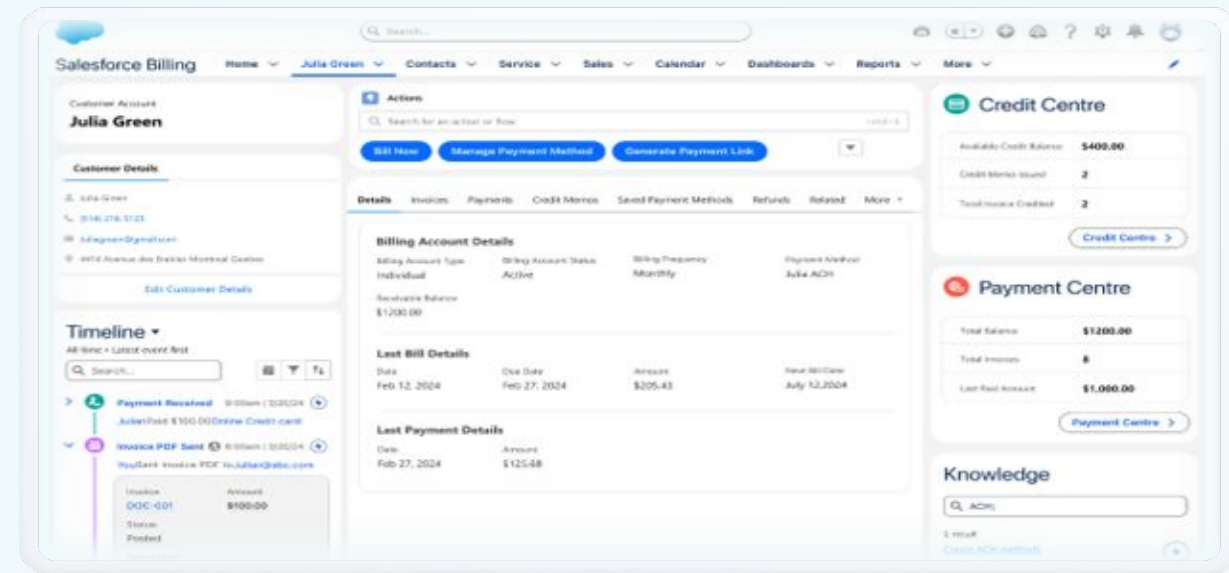
- Gain visibility into **Revenue** and customer health
- Support Multiple **Pricing** Models
- Support Automated **Renewals**
- Access from *Sales, Service and Experience Cloud*



Invoice Management

Calculate accurate invoices to accelerate payment and increase cash flow

- Grow your business with **Automated Billing** for all revenue models
- Reduce maintenance and operating costs with unified **product-to-cash**
- Collect cash faster with payment **flexibility** & collections
- Improve customer experiences with billing data visibility



Demo

Find out more

- Dreamforce '25 [Drive Growth with an Agentic Platform](#) revenue keynote session.
- To learn more about Revenue Cloud, [Get Started with Revenue Cloud](#).
- On Trailhead, start with [Revenue Cloud Foundation](#) module.
- To access hands-on videos, check out the Revenue Cloud Apex Hours series w/ *Stratus*

Carta:

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

Certification Alert

- Revenue Cloud Consultant certification is **LIVE!**
- Do you want to know more, follow [certification reference](#).
- Preparing to take your Revenue Cloud Consultant exam? Check out this [trail](#).



**Q&
A**

THANK YOU

