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APRIL 4TH 2025



Streamlining Sales and Revenue Operations with Salesforce Revenue Cloud

Luca Belligoli

Agenda

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



Luca Belligoli

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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.



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.



What is Revenue Cloud?

What is Revenue Cloud?

CRM for Sales



Revenue Cloud



CPQ



Contracts



Orders



Billing

Salesforce Platform



What is Revenue Cloud?

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 current product name
- **Revenue Cloud Plus/Advanced:** different Salesforce Revenue Cloud SKUs



Revenue Cloud: Key Components

E2E Journey



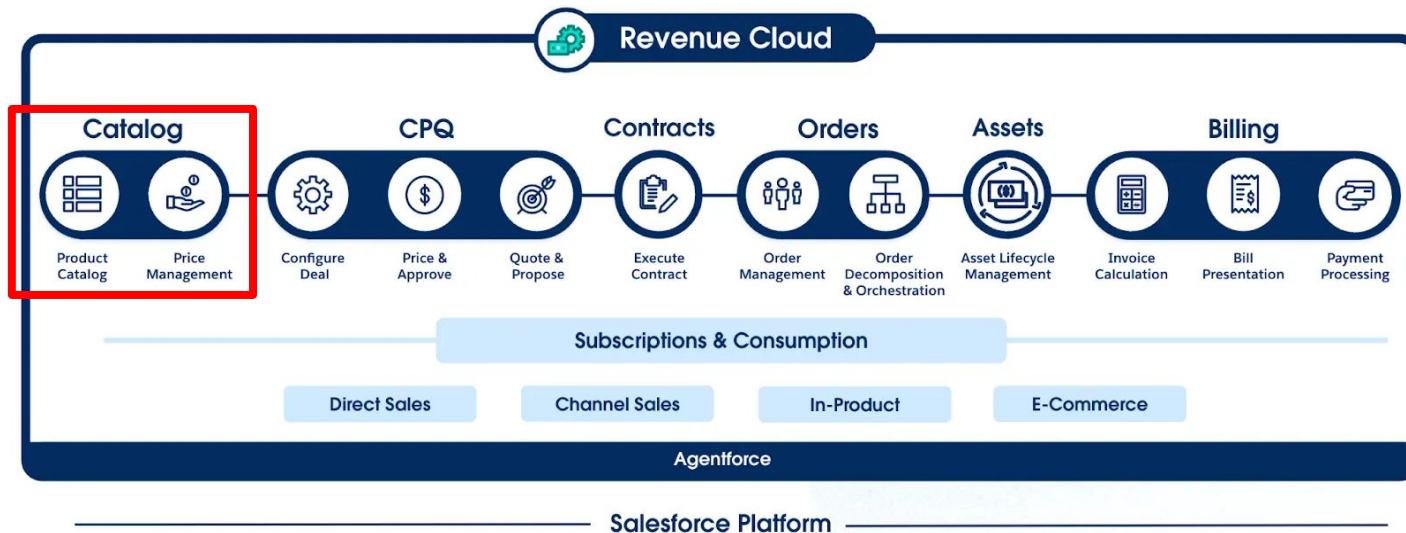
Fun Fact: If you've used Salesforce Industries CPQ, you'll notice many similar components, just with different names!



Product Catalog Management (PCM) & Salesforce Pricing Overview

Revenue Cloud: Key Components

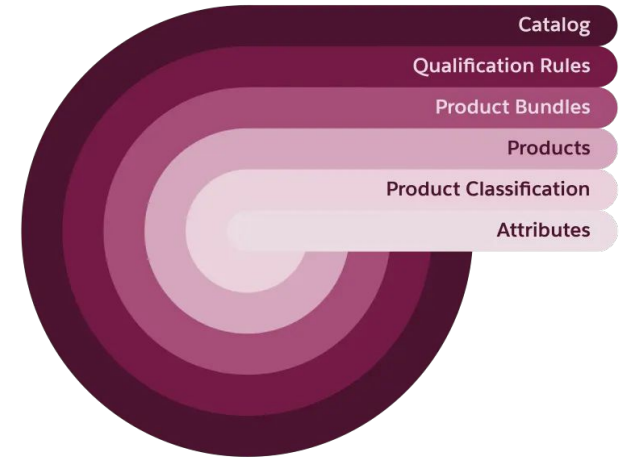
E2E Journey



Revenue Cloud: PCM Overview

Accelerate product launch and enable catalog-driven Quoting & Ordering solution across channels

- Build once and deploy everywhere!
- Provides a comprehensive ecosystem of tools and services for building, running, managing and optimizing a vast range of enterprise apps
- One centralized place where products and services are neatly organized
- Unified catalog-driven sales processes within a digital platform to improve business agility
- Structured way to manage lifecycle of products to make product innovation faster



Tip: Product Catalog Management aligns with the Salesforce Industries Enterprise Product Catalog (EPC).



PCM: Attributes & Attribute Categories

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.

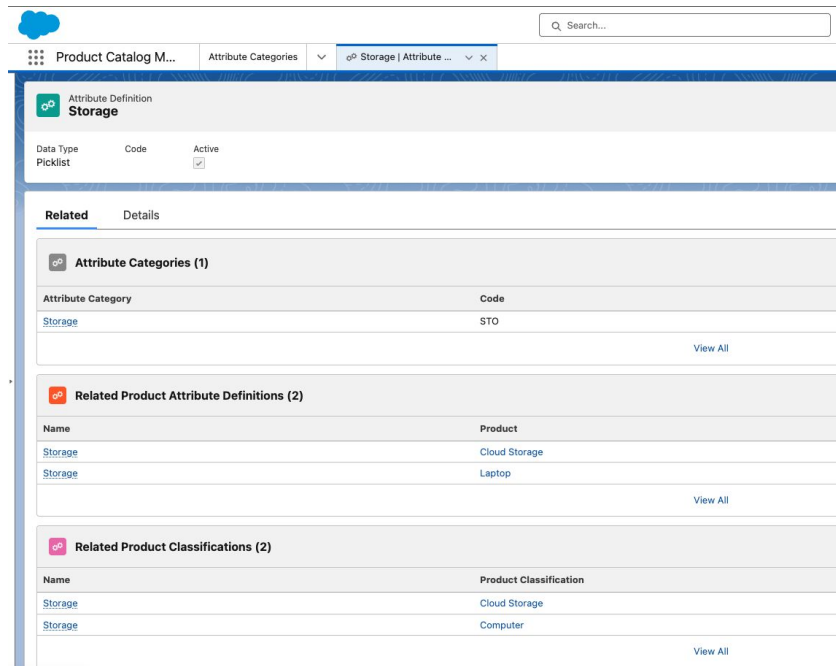
Organize Attributes

- 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.*

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.



The screenshot displays the 'Storage' attribute definition in the PCM system. The interface includes a search bar at the top right and a breadcrumb trail: 'Product Catalog M...' > 'Attribute Categories' > 'Storage | Attribute ...'. The main content area is titled 'Attribute Definition Storage' and shows a table with columns 'Data Type', 'Code', and 'Active'. The 'Data Type' is 'Picklist', the 'Code' is 'STO', and the 'Active' checkbox is checked. Below this, there are three sections: 'Attribute Categories (1)', 'Related Product Attribute Definitions (2)', and 'Related Product Classifications (2)'. Each section contains a table with links to view all items.

Attribute Category	Code
Storage	STO

[View All](#)

Name	Product
Storage	Cloud Storage
Storage	Laptop

[View All](#)

Name	Product Classification
Storage	Cloud Storage
Storage	Computer

[View All](#)



PCM: Product Classifications

Template to introduce new products faster

Make it easy

Holds a collection of dynamic attributes to make setting up new product in an instant.

Be a Creator

Assign dynamic attributes individually or by Attribute Group and manage attribute properties.

Tweak it

Set attribute to Required/Optional, Hidden/Visible - configure your template

Example

Ursa Major Solar has a large number of Computers (Apple, Dell, ...). Creating each model one-by-one can be time-consuming. Ursa Major Solar creates 1 product classification and it will have attributes like:

Graphics
Memory



The screenshot shows the Salesforce Product Classification interface for a 'Computer' classification. The 'Attributes' tab is selected, showing a table of 6 attributes. The table has columns for Name, Attribute, Data Type, and Default Value. The attributes listed are Graphics, Memory, Processor, Display, Screen Size, and Storage.

	Name	Attribute	Data Type	Default Value
1	Graphics	Graphics	Picklist	
2	Memory	Memory	Picklist	RAM 32GB
3	Processor	Processor	Picklist	i5-CPU 4.4GHz
4	Display	Display	Picklist	1080p Built-in Display
5	Screen Size	Screen Size	Picklist	
6	Storage	Storage	Picklist	

Tip: Salesforce Product Classifications align with the Salesforce Industries Object Types (EPC).



Introduce new products faster

Make it easy

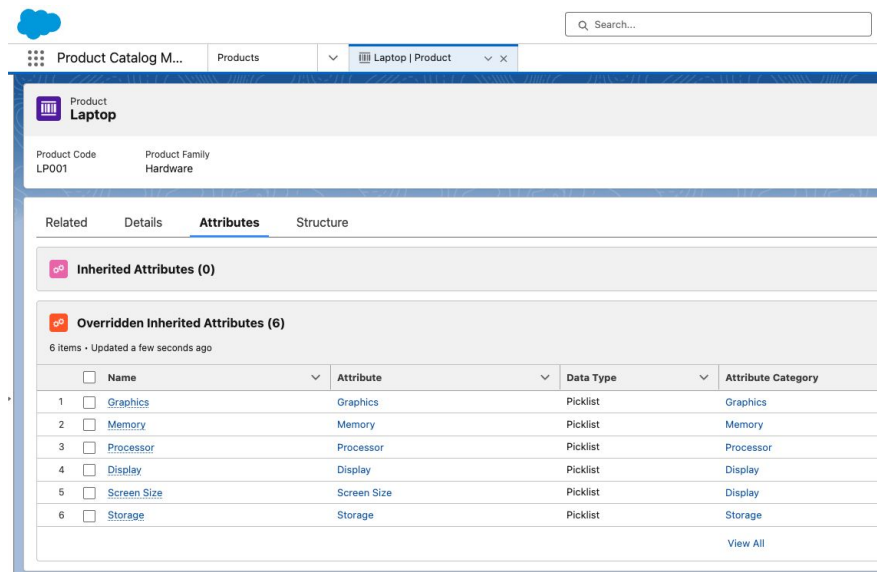
- Create simple and complex products quickly
- Override inherited Product attributes

Simple vs Bundle products

Define simple products w/o children or combos/bundles

Selling Model

- Product Selling Model help you define how you want to sell your product (One Time price, Recurring price)



The screenshot displays the 'Product Catalog Management' interface. The top navigation bar includes a search bar and tabs for 'Product Catalog M...', 'Products', and 'Laptop | Product'. The main content area shows the 'Attributes' tab for the 'Laptop' product. It lists 'Inherited Attributes (0)' and 'Overridden Inherited Attributes (6)'. The overridden attributes are listed in a table with columns for Name, Attribute, Data Type, and Attribute Category.

☐	Name	Attribute	Data Type	Attribute Category
☐	Graphics	Graphics	Picklist	Graphics
☐	Memory	Memory	Picklist	Memory
☐	Processor	Processor	Picklist	Processor
☐	Display	Display	Picklist	Display
☐	Screen Size	Screen Size	Picklist	Display
☐	Storage	Storage	Picklist	Storage

6 Items • Updated a few seconds ago

[View All](#)

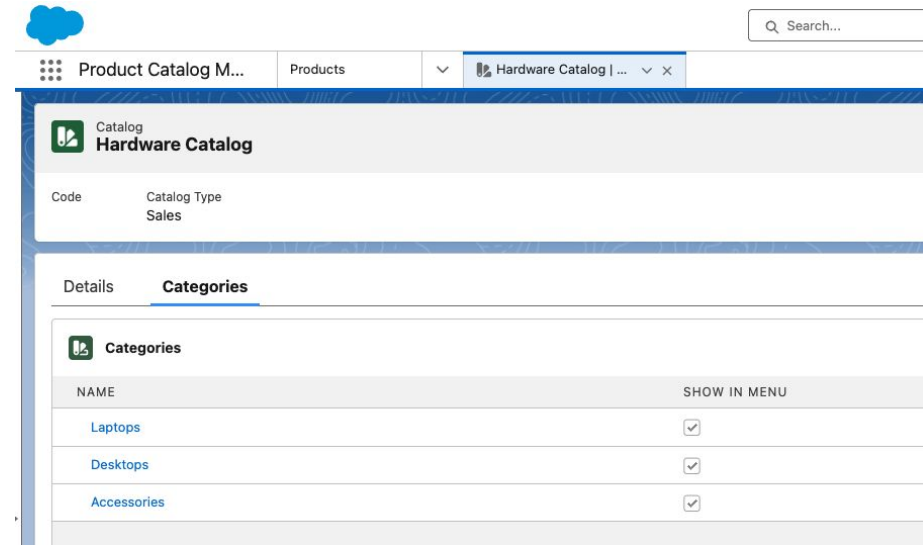


PCM: Catalogs and Categories

Create visual catalog the way your users understand it.

Catalogs organize products by categories and allow for easy browsing.

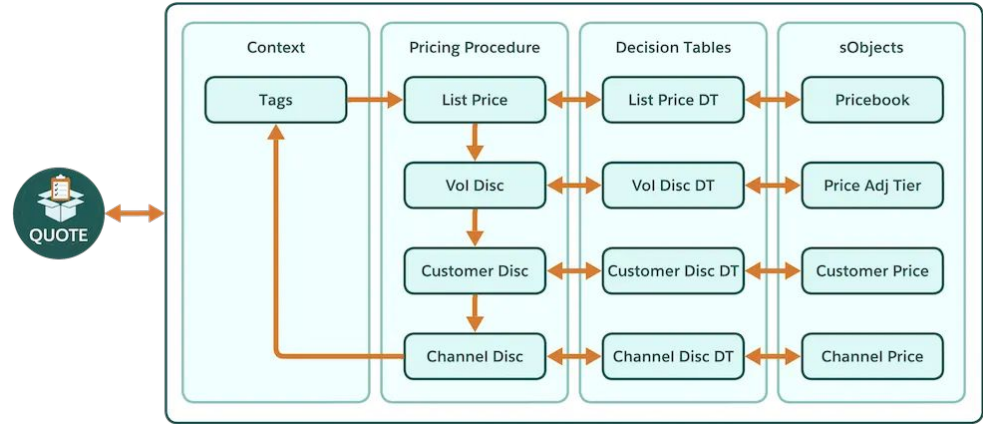
Catalogs are an important part of managing product data and ensuring that customers can easily find what they are looking for.



Revenue Cloud: Salesforce Pricing

A Unified pricing platform

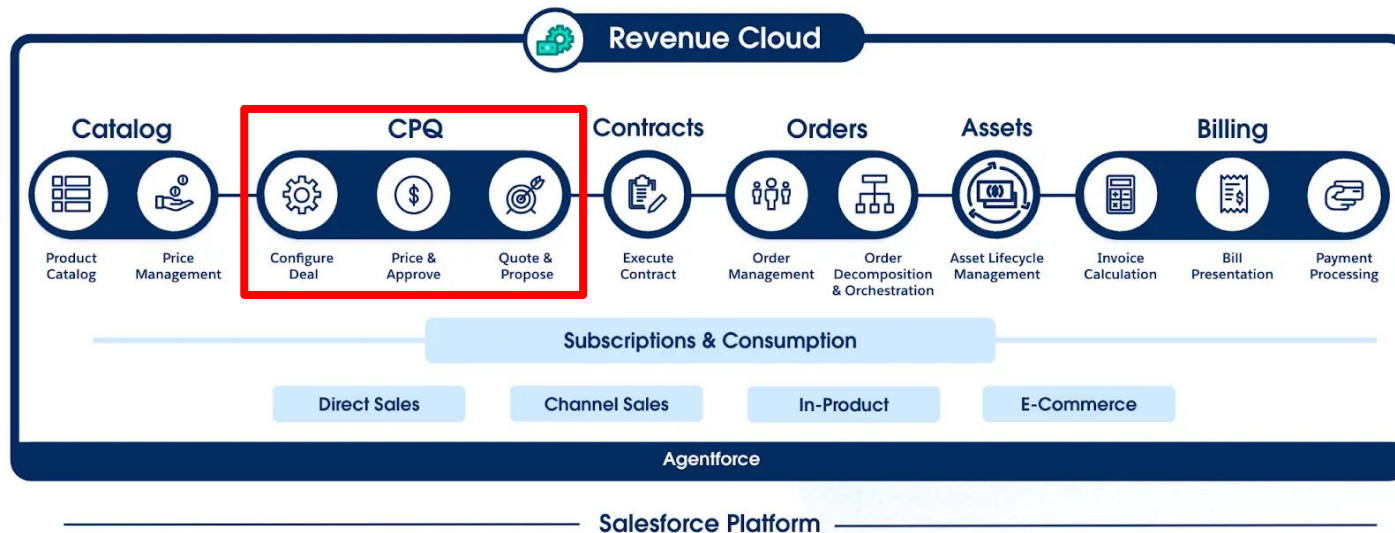
Salesforce Pricing helps you create accurate, tailored pricing for different customers and markets, ensuring you can adjust as needed to maximize sales.



Configure Price Quote (CPQ) Overview

Revenue Cloud: Key Components

E2E Journey



CPQ: Product Configurator

Configurator Process

Products and Rules Configuration

Effortless attribute selection and quantity adjustment with intuitive configuration, applying business rules through validation, inclusion, and exclusion at the time of sale.

Price Validation (Real-time/Manual update)

Instant/on demand pricing available at the time of configuration along with details of the various pricing elements.

Product Validation (Real-time/Manual validation)

Quick sanity check of the product being configured at runtime along with appropriate user messages for correction.

**Cisco Bundle**

My Conferencing Quote Q-1138

USD 1,125.00 Per month

USD 154,200.00 One time

Quantity 1

Included Bundles

**Onsite Networking Bundle**

USD 149,200.00

[Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam et fermentum ligula. In hac habitasse platea dictumst. Vestibulum ante ipsum primis in faucibus orci luctus.]

Requires configuration

Quantity 1

Subscriptions

**WebEx Suite**

USD 625.00

Webex Suite has everything your business needs to collaborate. It's the world's first unified, purpose-built suite for hybrid work.

25.00 Per month

Quantity 25

Summary

Cisco Bundle

Quantity 1	Net Unit Price USD 155,325.00	Net Amount USD 155,325.00
------------	-------------------------------	---------------------------

INCLUDED BUNDLES

Onsite Networking Bundle 15 Attributes

Quantity 1	Net Unit Price USD 149,200.00	Net Amount USD 149,200.00
------------	-------------------------------	---------------------------

SERVICES

Installation Services Attribute

Quantity 1	Net Unit Price USD USD 40,000.00	Net Amount USD USD 40,000.00
------------	----------------------------------	------------------------------

HARDWARE

WebEx Kit Bundle Floor Stand, Wheel Kit, & Carbon Color

Quantity 1	Net Unit Price USD 100,000.00	Net Amount USD 100,000.00
------------	-------------------------------	---------------------------

Cisco Board Pro Floor Stand & Wheel Kit

Quantity 5	Net Unit Price USD 15,000.00	Net Amount USD 75,000.00
------------	------------------------------	--------------------------

Cisco Room Bar Carbon Color

Quantity 5	Net Unit Price USD USD 5,000.00	Net Amount USD 25,000.00
------------	---------------------------------	--------------------------

One Time Total USD 154,200.00

Monthly Total USD 1,125.00

Cancel Save & Exit



'25

CPQ: Composable Design Templates

Powered by the Flow Builder

Flow Components for Configurator

The Configurator template UI is composed by

- **Product Header**
- **Product Attributes**
- **Pricing Summary**

Customizable Layout

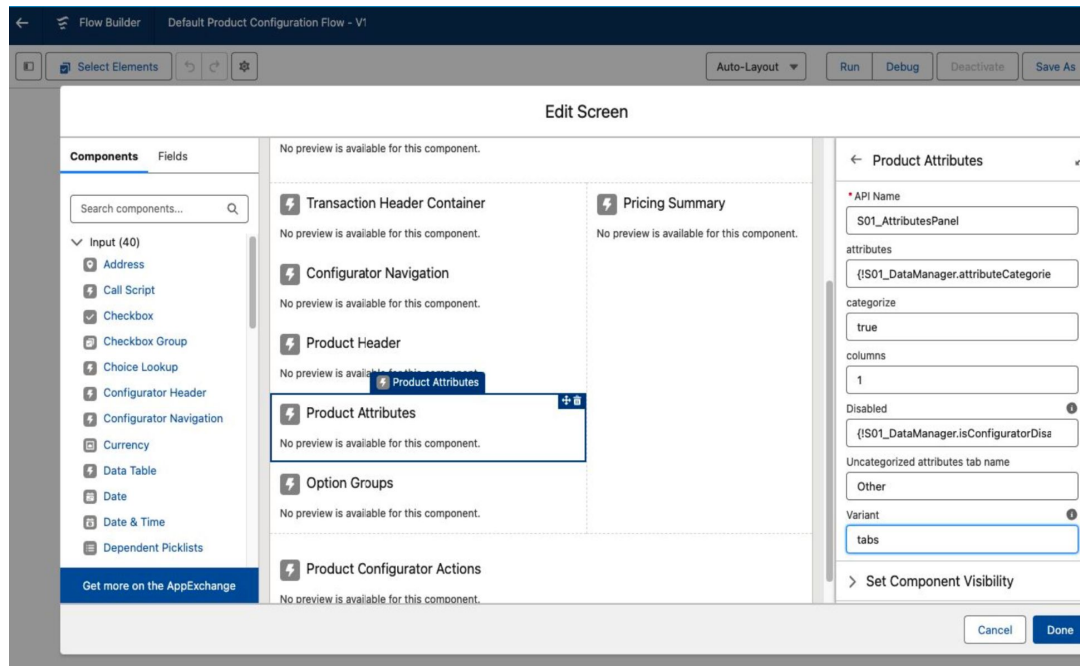
Component properties can be updated to change the look and feel.

Product Configuration Flow Record

A record used to manage the assignment of products and product classifications to templates.

Assign Products/Product Classification to a Template

One or more products/product classification can be assigned to a configurator Flow template.



Dynamic Revenue Orchestrator (DRO) Overview

Revenue Cloud: Key Components

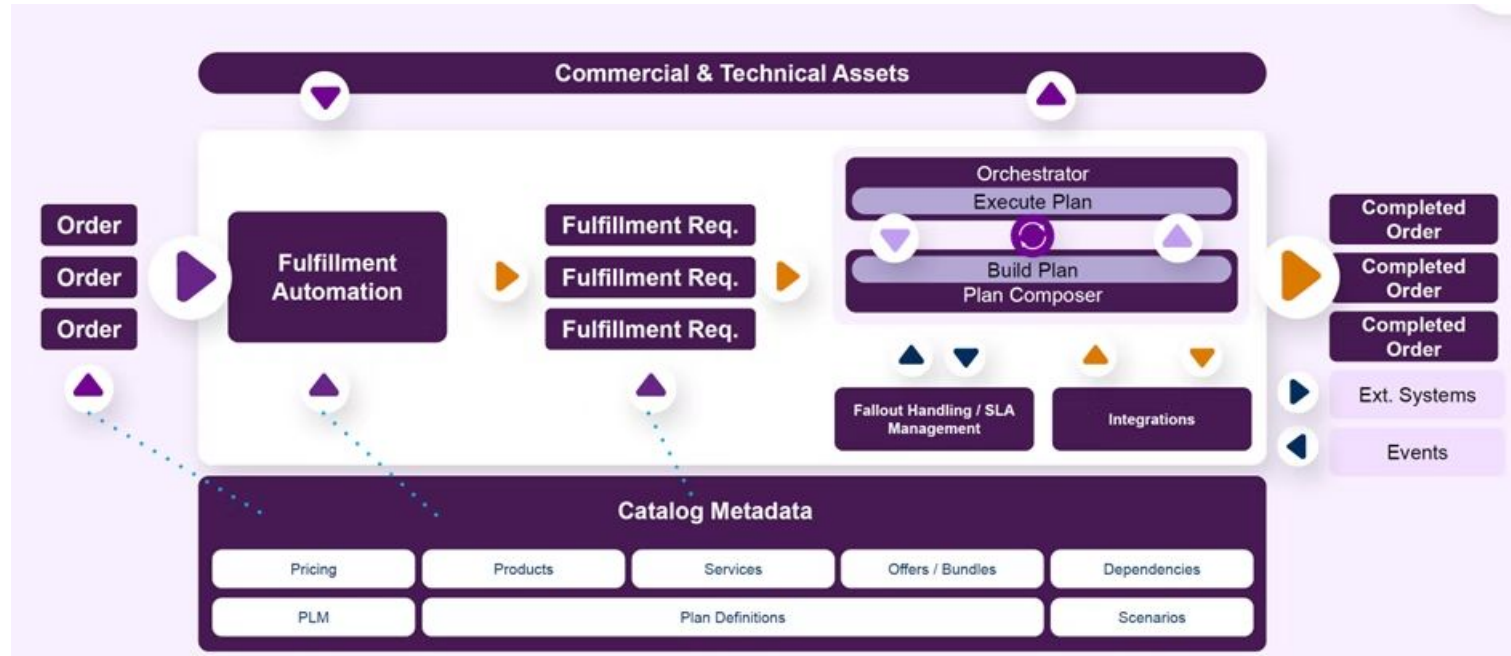
E2E Journey



Tip: Dynamic Revenue Orchestrator aligns with the Salesforce Industries Order Management (IOM).



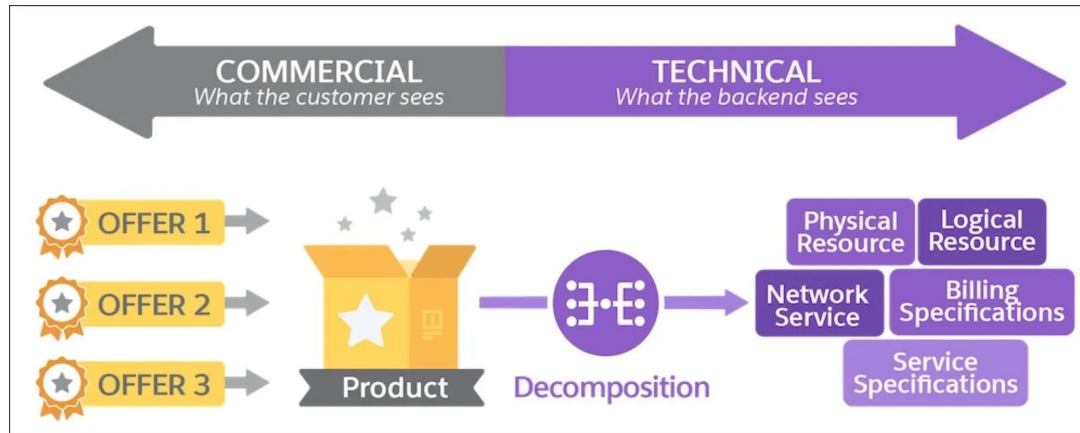
DRO: Architecture



Decomposition

What is Decomposition?

Decomposition refers to breaking down a customer order into smaller, manageable steps. It occurs **while** the order is submitted, with specific rules and mappings created for this purpose.



Plan Viewer

Plan Generation

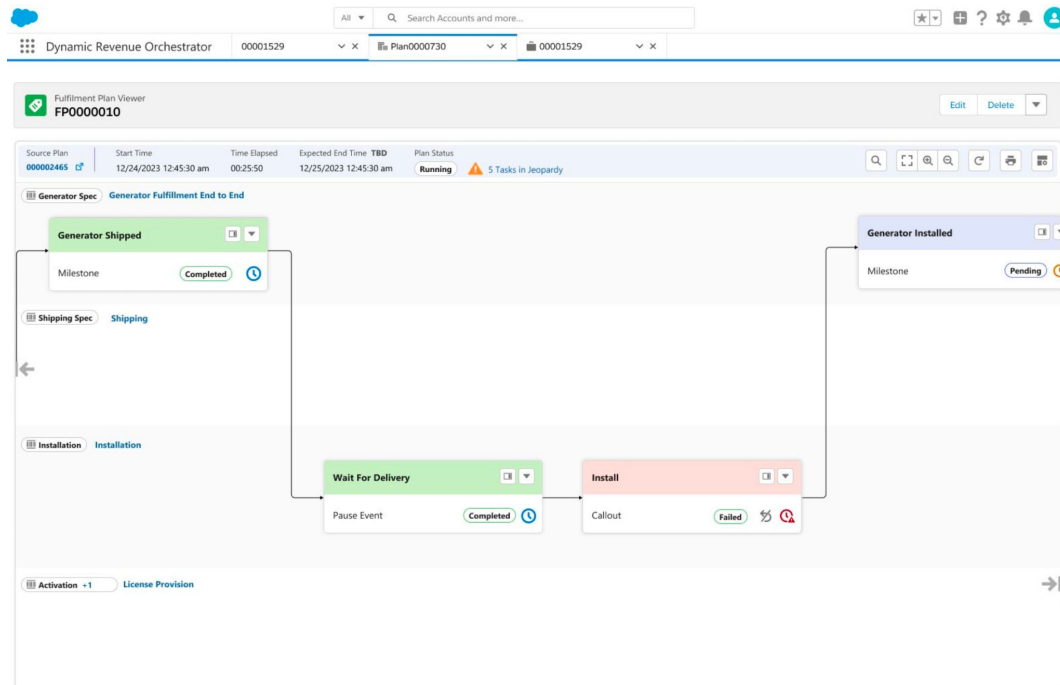
A plan is generated every time an Order is submitted to DRO. A Fulfillment Plan is Completed when all the Tasks are marked as Completed.

Use Case

A real-time visual representation of each fulfillment step's status, allowing users to view details and manually mark in-progress steps as completed if needed.

Error Monitoring

The Fulfillment Manager reviews failed steps and manually retries them to keep orders on track.



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

Autotask

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

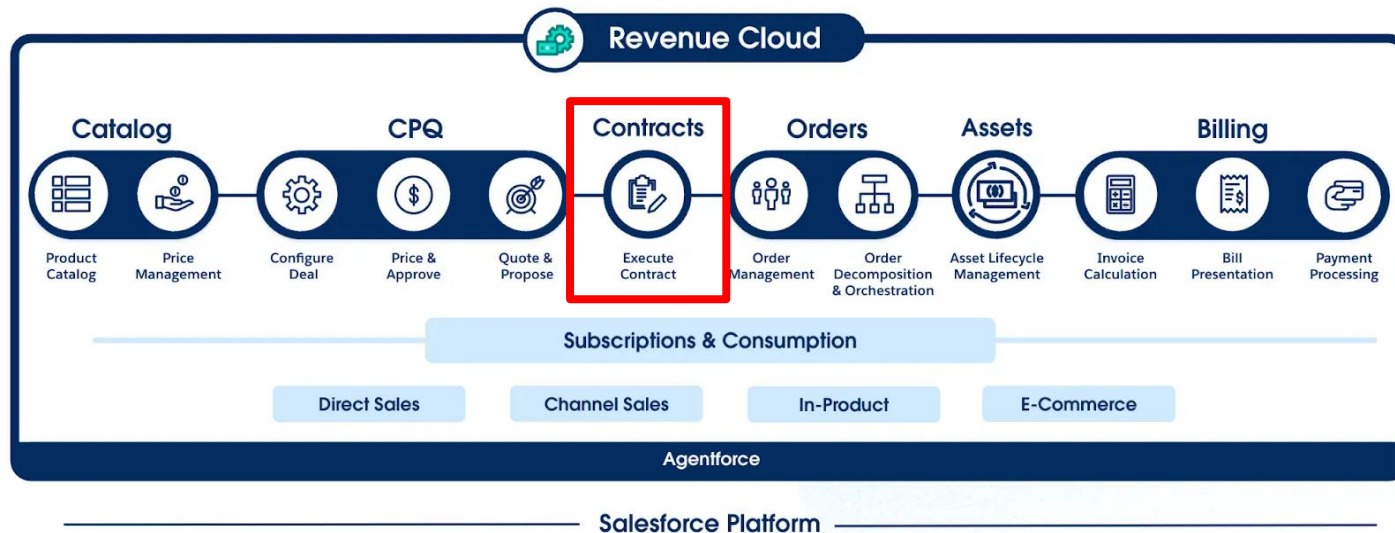
Used when user input is needed at a particular place in fulfillment flow. Supports Guided Manual Task resolution via Omniscripts



Salesforce Contracts Overview

Revenue Cloud: Key Components

E2E Journey



Tip: Salesforce Contracts aligns with the Salesforce Industries Contract Lifecycle Management (CLM).



Salesforce Contracts: Functional Capabilities

Contract Authoring

Contract Template
Designer

Dynamic Document
Generation (PDF, DOCX,
PPT)

Clause Library

MS 365 Integration

Contract APIs

Create Contract

Dynamic Contract Actions

Document Versioning

Lifecycle Management

Contract Types

State Model

E-signature with DocuSign

Salesforce Contracts
Analytics

Obligation Management



Revenue Cloud Demo

Enablement Resources

Find Out More

Let's Unwrap the Goodies! 🎉

- Dreamforce '24 [Beyond CPQ: Drive Revenue Success with the NEW Revenue Cloud](#) session.
- To learn more about Revenue Cloud, [Get Started with Revenue Cloud](#).
- 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.
- On Trailhead, start with [Revenue Cloud Foundation](#) module.
- To access hands-on videos, check out the Revenue Cloud Apex Hours series:
 - [Revenue Cloud: PCM & Pricing](#)
 - [Revenue Cloud: CPQ & DRO](#)
 - [Revenue Cloud: Salesforce Contracts & DocGen](#)



Q&A

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