

Powering RevOps with Agentforce + Revenue Cloud



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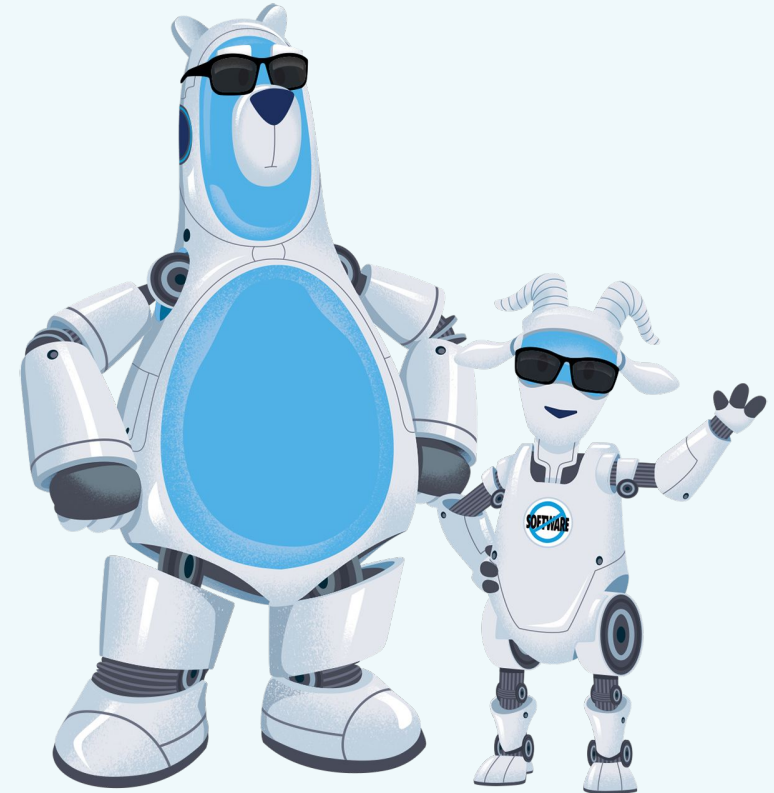
-  Overall 16+ years of Experience
-  7 years in Salesforce Industries
-  Ex-Vlocity / Ex-Salesforce
-  15x Certifications, 2x Accredited Professionals
-  Dubai, United Arab Emirates

Powering RevOps with Agentforce + Revenue Cloud

Learn how Agentforce combined with **Agentforce Revenue Management (FKA Revenue Cloud)** can streamline quoting, pricing, ordering, and renewals directly in the agent workspace. We'll walk through core ARM modules, how sales and service teams execute revenue workflows, and how to automate quoting using Flows + OOTB CPQ Invocable Actions, followed by a live demo.

Agenda

- Current Revops Problems
- Introduction to Agentforce Revenue Management (ARM)
- Key ARM Modules: Product Catalog, Pricing, CPQ, Order & Asset Lifecycle
- Sales Process in ARM
- Components to build an agent
- Integrating Agentforce with ARM using Flows + OOTB Invocable Actions
- What's Available Out-of-the-Box vs Where Extensions Fit
- Live Demo: Automated Quoting & Order Submission
- Q&A



Current RevOps Problems



Quoting still done
in Excel



Products managed
in spreadsheets



Teams working in
silos



No automated quoting
or approvals



Fragmented deal
lifecycle



No customer-centric
insights

Agentforce Revenue Management

Complete Revenue Platform Powered by Agentforce

salesforce

Agentforce



Subscriptions & Consumption

Direct Sales

Channel Sales

In-Product

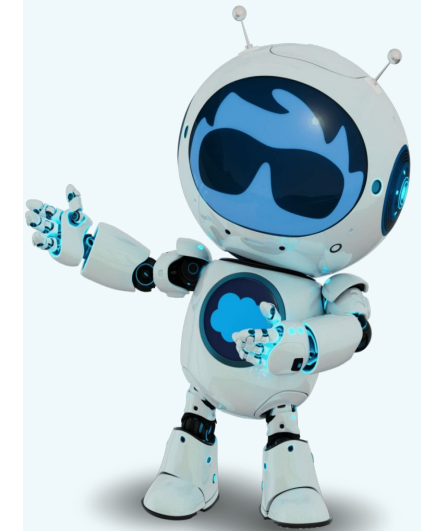
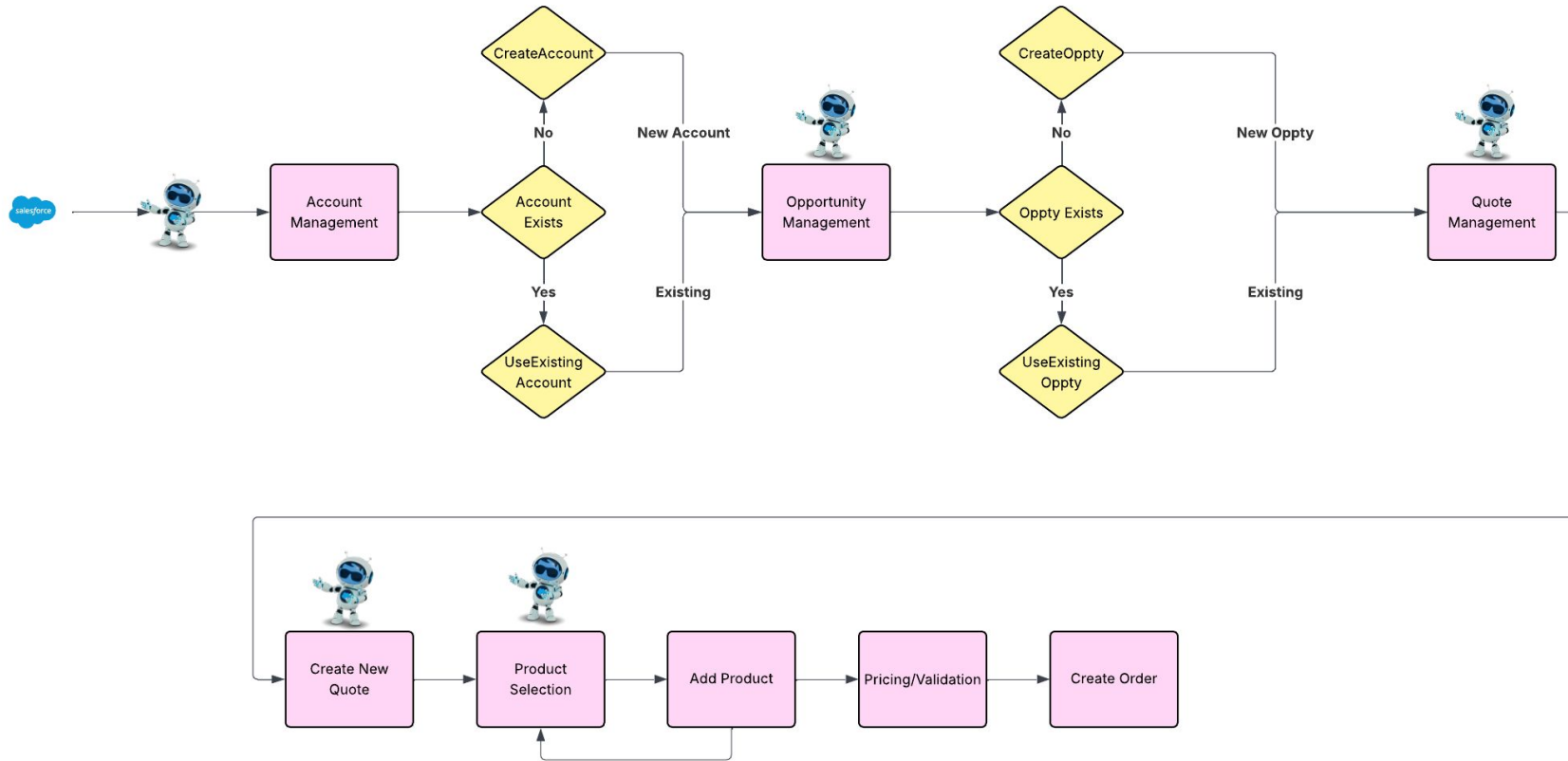
E-Commerce

Data & Trust Layer

Salesforce Platform



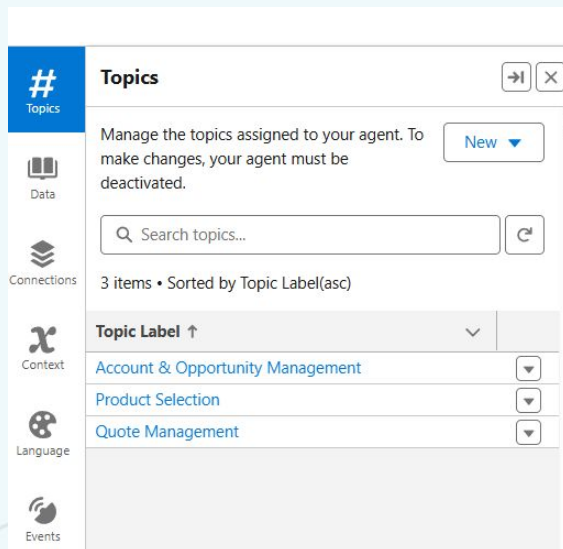
ARM Sales Process Flow



What is needed for configuring an Agent

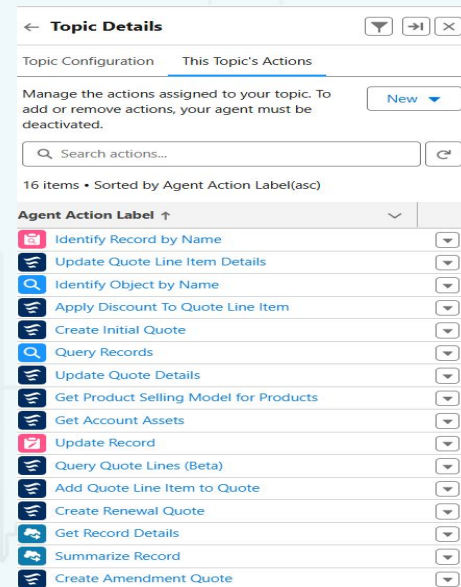
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Topics



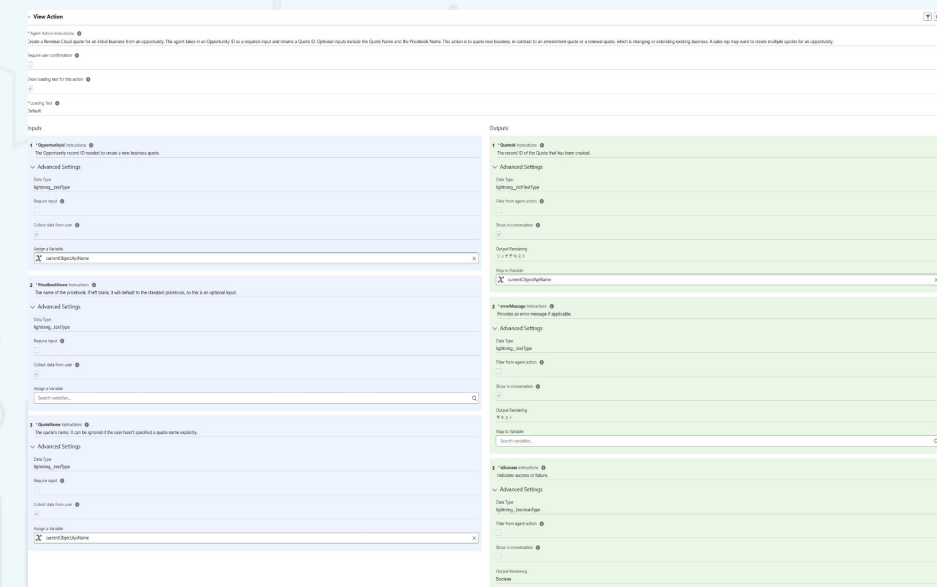
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Actions

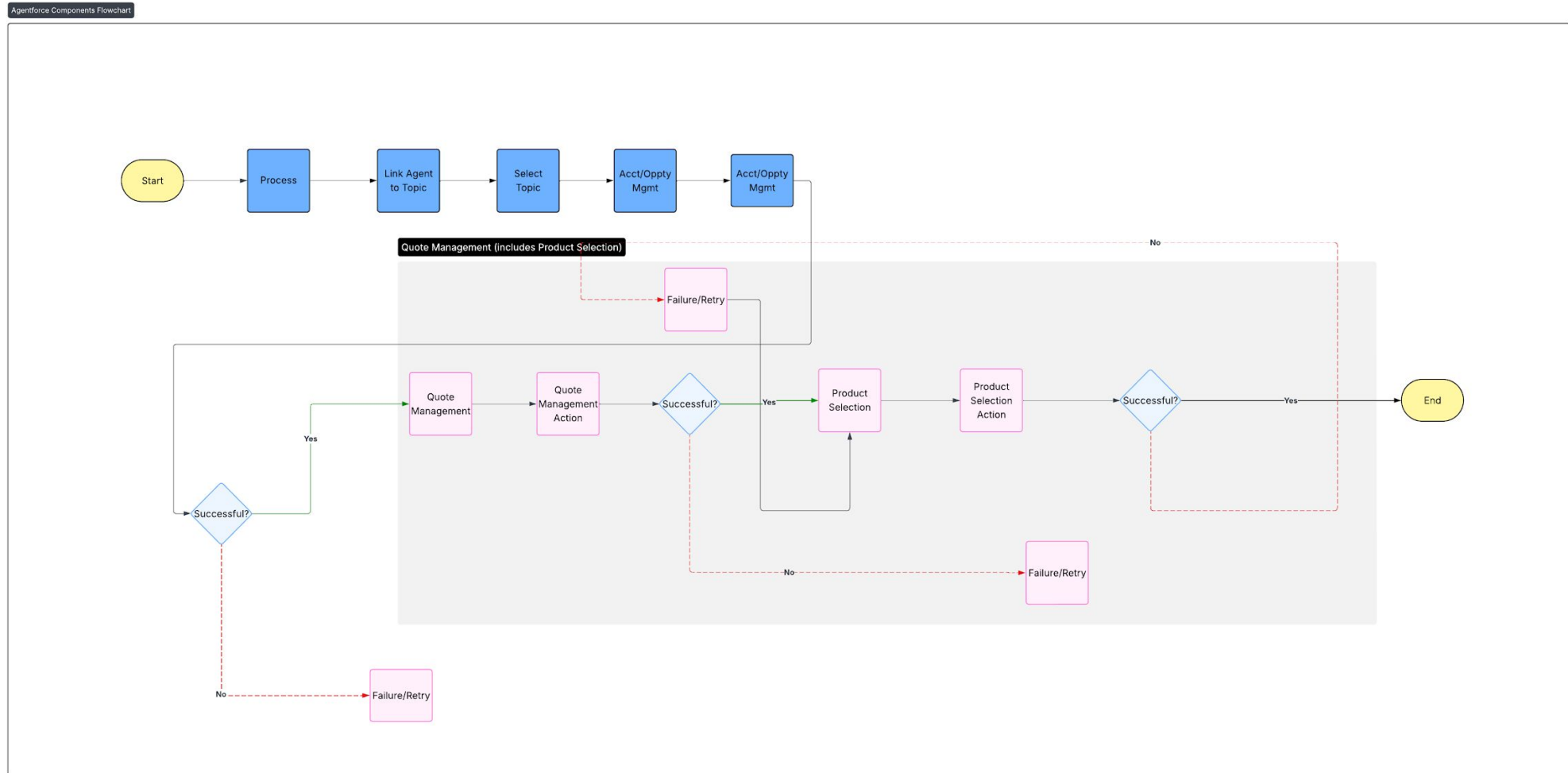


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Input/Output



ARM Agent Flow



Agent Actions

Flow

Apex

API

Integration
Procedure

Prompt Template

Extending Agentforce with ARM's Revenue Execution Layer

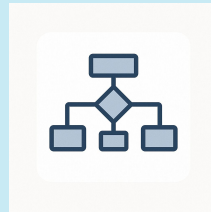
- **Agentforce** includes standard out-of-the-box actions to support common CRM workflows. However, **ARM (Agentforce Revenue Management)** introduces domain-specific functions for **quoting, pricing, product configuration, order capture, and asset lifecycle** management.
- These processes require **purpose-built execution logic**, beyond standard Agentforce capabilities.
- To enable seamless agent-led sales and service experiences, we **extend Agentforce** using ARM's native execution layer:

What Agentforce Revenue Management Provides

Agentforce Revenue Management (ARM) offers a complete set of tools that allow you to automate, orchestrate, and scale the entire **Quote** → **Order** lifecycle inside Agentforce.

1. Flow Integrations (No-Code Automation)

- OOTB invocable actions for quoting, pricing, cart updates, order creation
- Drag-and-drop automation for guided selling & service flows
- Perfect for agent workflows and next-best-actions
- Used in this demo to execute ARM quoting & ordering logic



2. Invocable Actions (Reusable ARM Logic)

- ARM exposes pre-built business actions (price calculation, cart management, order submit)
- Seamlessly consumed in Flow, OmniStudio, or Agentforce Vibe actions
- Ensures consistent behaviour across all automation layers



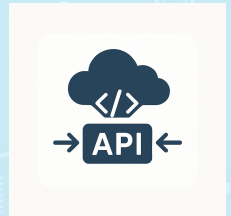
3. Apex Extensibility

- Use ARM-provided Apex classes to extend quoting & ordering
- Create custom agent actions, validation hooks, pricing rules
- Ideal for advanced use cases not covered by OOTB actions

```
public class MyClass
{ void
  myMethod()
}
```

4. ARM APIs (Headless, Composable Architecture)

- REST APIs for Cart, Product, Pricing, Offers, and Order Management
- Power the same engine used in UI flows
- Allows external systems, portals, or middleware integrations
- Future-ready architecture for omnichannel RevOps



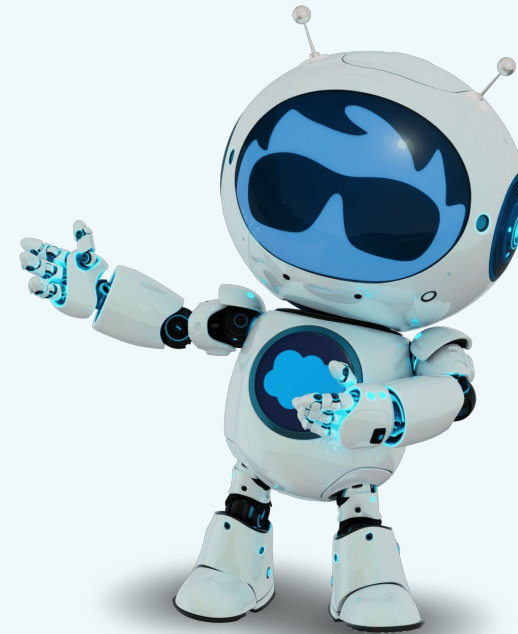
DEMO

How BlueFiber Sells Internet Using Salesforce (Agentforce + ARM)

Meet **BlueFiber Communications**, a fictional internet provider that sells high-speed Fiber, TV, and Voice services in Dubai.

BlueFiber wants to modernize how their sales team works. Instead of agents clicking through dozens of screens, they now use an **AI Assistant powered by Agentforce + ARM**.

Let's follow the journey of a sales agent—**Aisha**, and her customer—**Rohan Mehta**.



Q&A

THANK YOU

