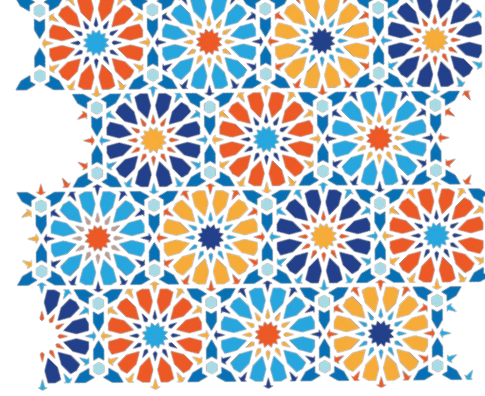
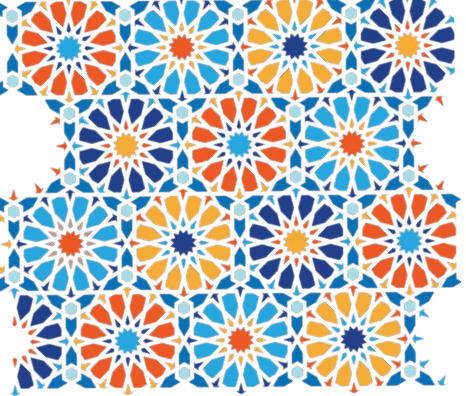




Mastering the Core of Revenue Cloud: A Functional Deep Dive

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Speaker



Anuj Vaishampayan

Director, Technical Architect
anuj@stratuscarta.com

[LinkedIn](#)



About Stratus Carta

We Do Not Run Projects, We Help the Projects You Run, Run Better

Stratus Carta

Salesforce Industries &
Revenue Cloud 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 EPC / PCM / CPQ / OM / DRO / BRE design, DevOps, proof of concepts, performance testing & tuning, scale testing, best practices reviews, upgrades, data migration, greenfield vs brownfield org assessments, regression testing, and more



Georgii Saveliev speaking at
Dreamforce 2023



Anuj Vaishampayan featured at
Dreamforce 2024



Reconnecting with David Schmaier at
TrailblazerDX 24



Stratus Carta selected for Comms
Partner Advisory Board

www.stratuscarta.com



Current RevOps Problems

Current RevOps Problems



Quoting still done
in Excel



Products managed
in spreadsheets



Teams working in
silos



No automated quoting
or approvals

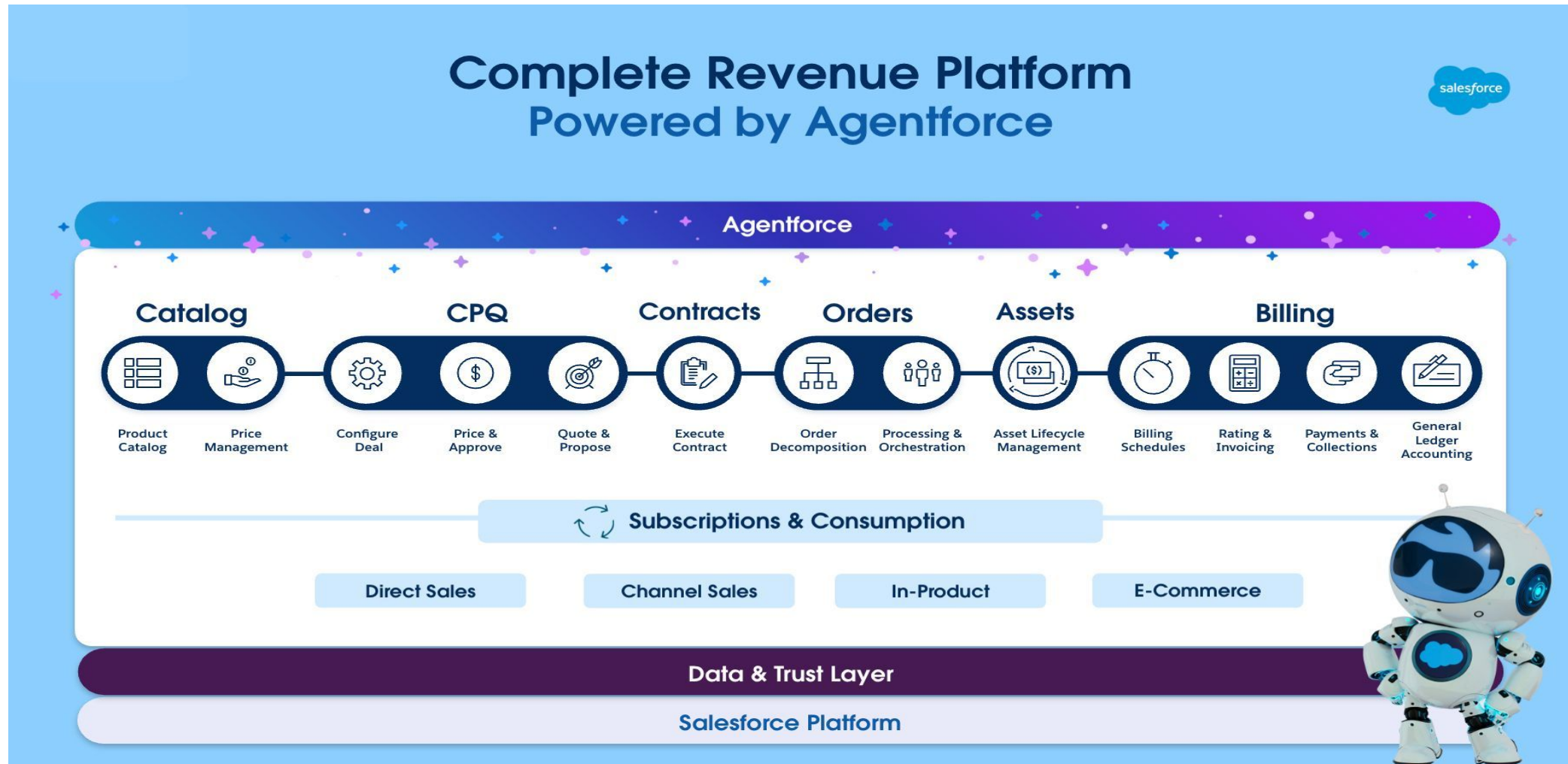


Fragmented deal
lifecycle



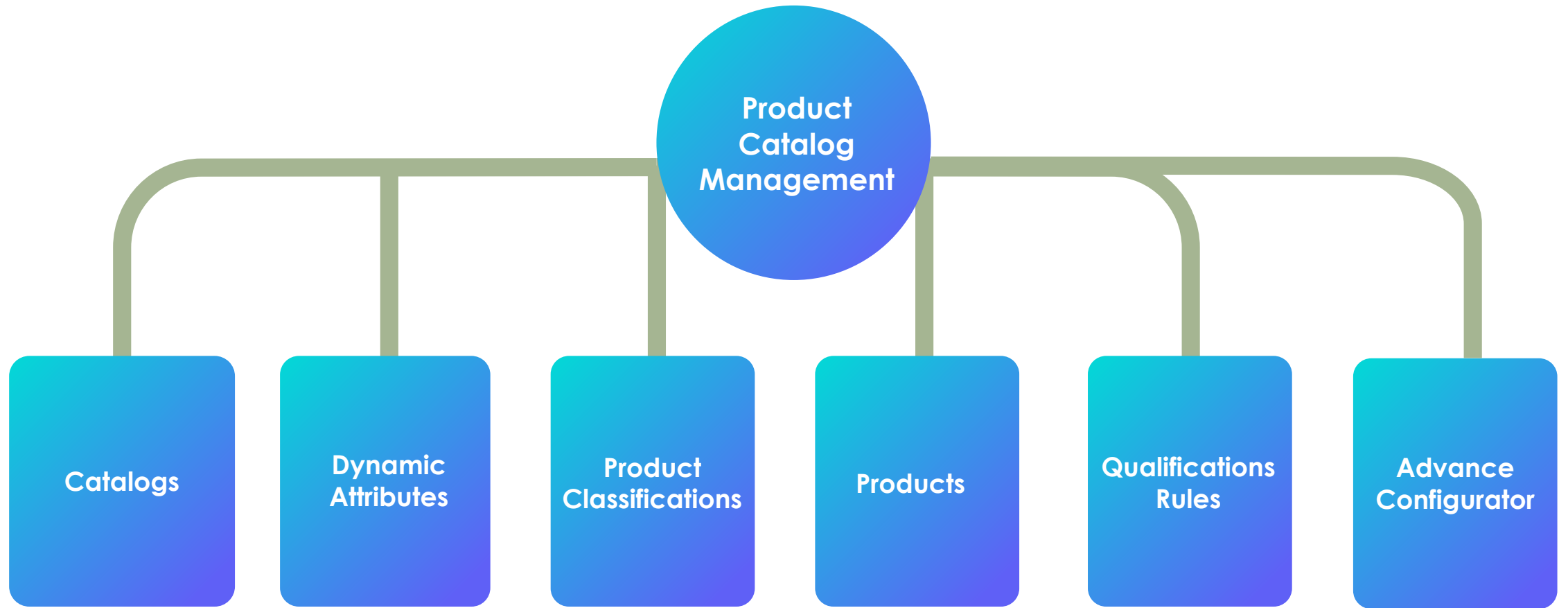
No customer-centric
insights

Agentforce Revenue Management

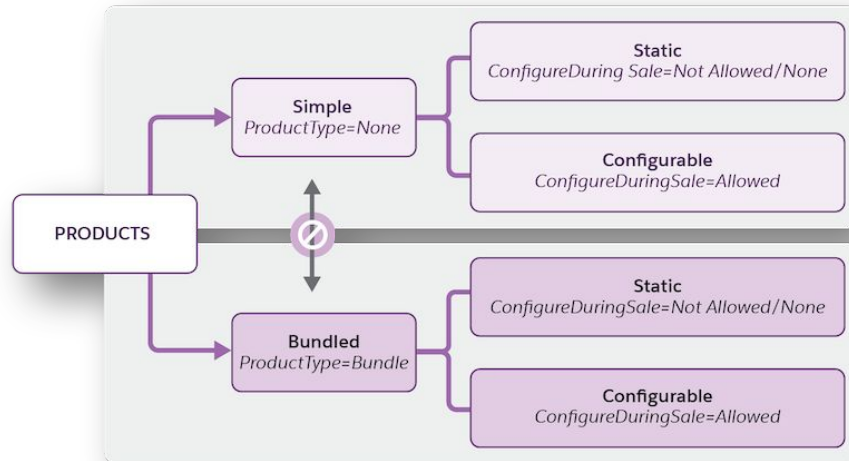


Product Catalog Management (PCM)

Key Features



Products



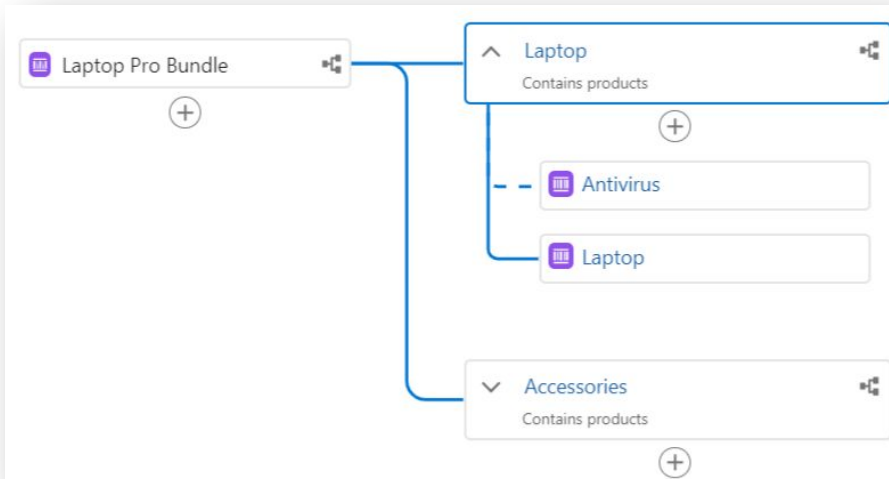
Definition: Items and services sold to customers, which can be sellable or non-sellable.

Types:

- Simple Products: No associated product hierarchy.
- Bundled Products: Group of products sold together as one unit.

Sub Types:

- Static Products: Cannot be configured during runtime.
- Configurable Products: Can be configured during runtime.



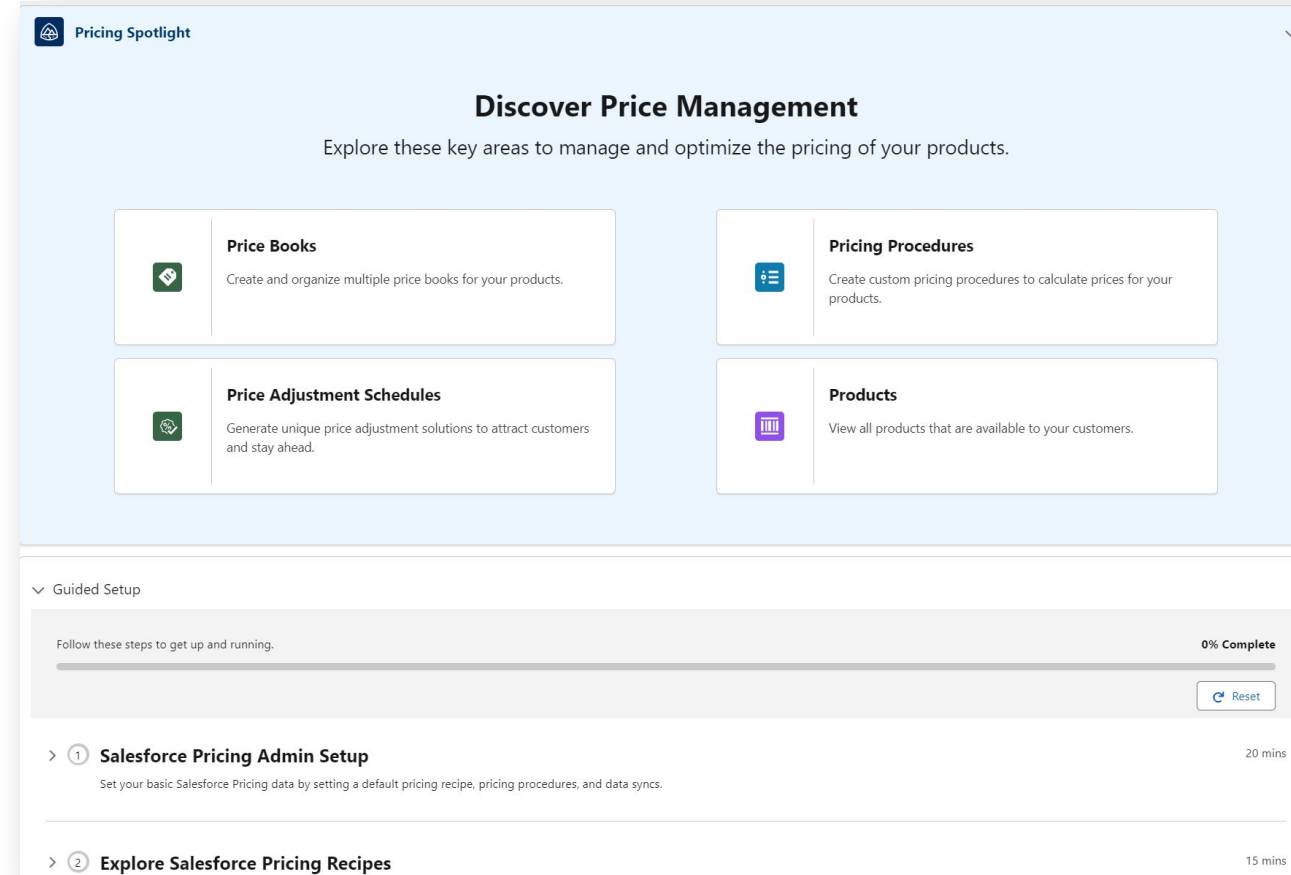
Salesforce Pricing

Salesforce Pricing Introduction

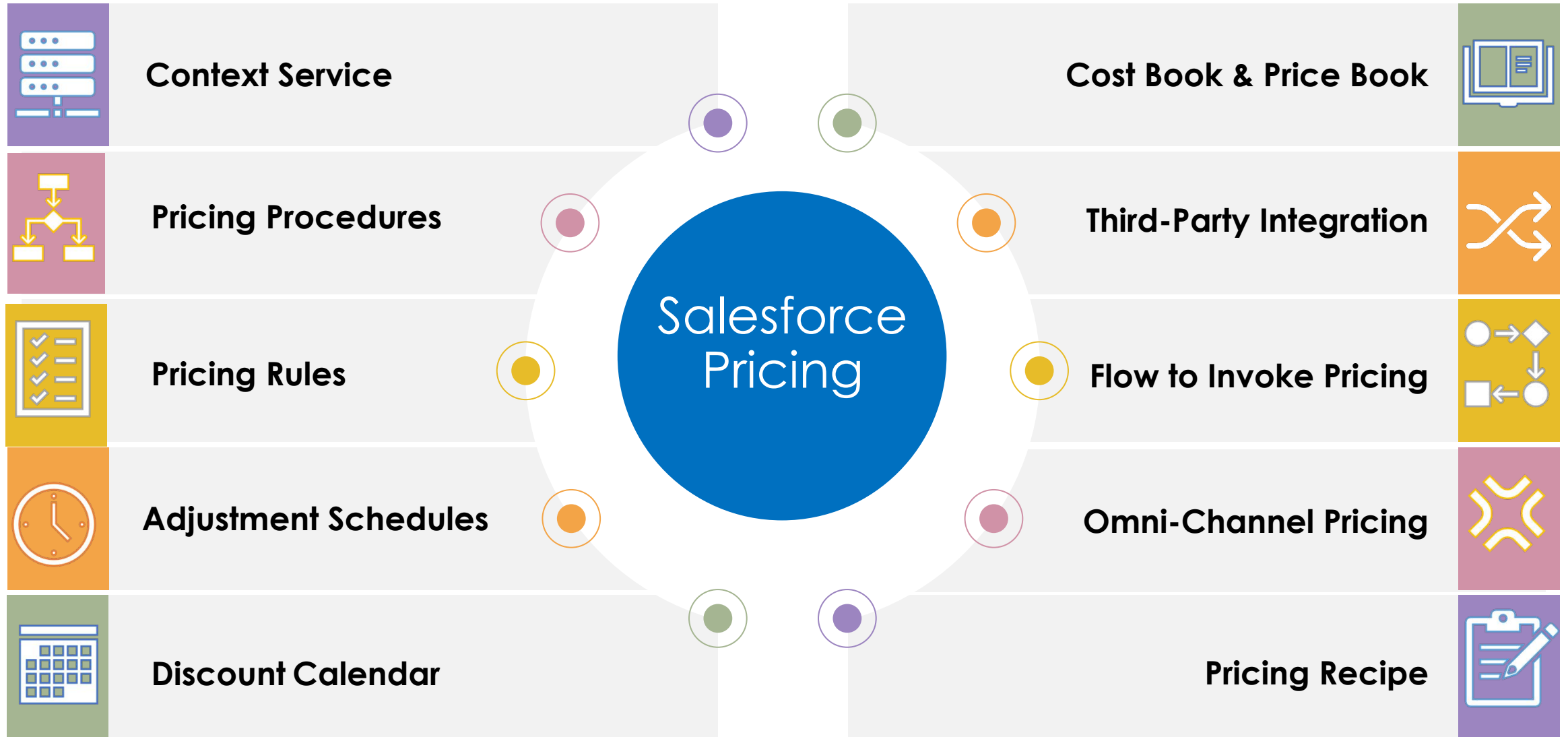
Salesforce Pricing for Agentforce Revenue Management is a comprehensive solution designed to streamline and optimize pricing strategies. It empowers businesses with the ability to create customized price adjustment methods, define precise formulas for calculating final net prices, and gain complete visibility into the pricing calculation process. By leveraging context mapping, customizable pricing procedures, and decision tables, Salesforce Pricing ensures accurate and dynamic pricing tailored to unique business needs.

This robust solution supports various roles involved in the pricing process:

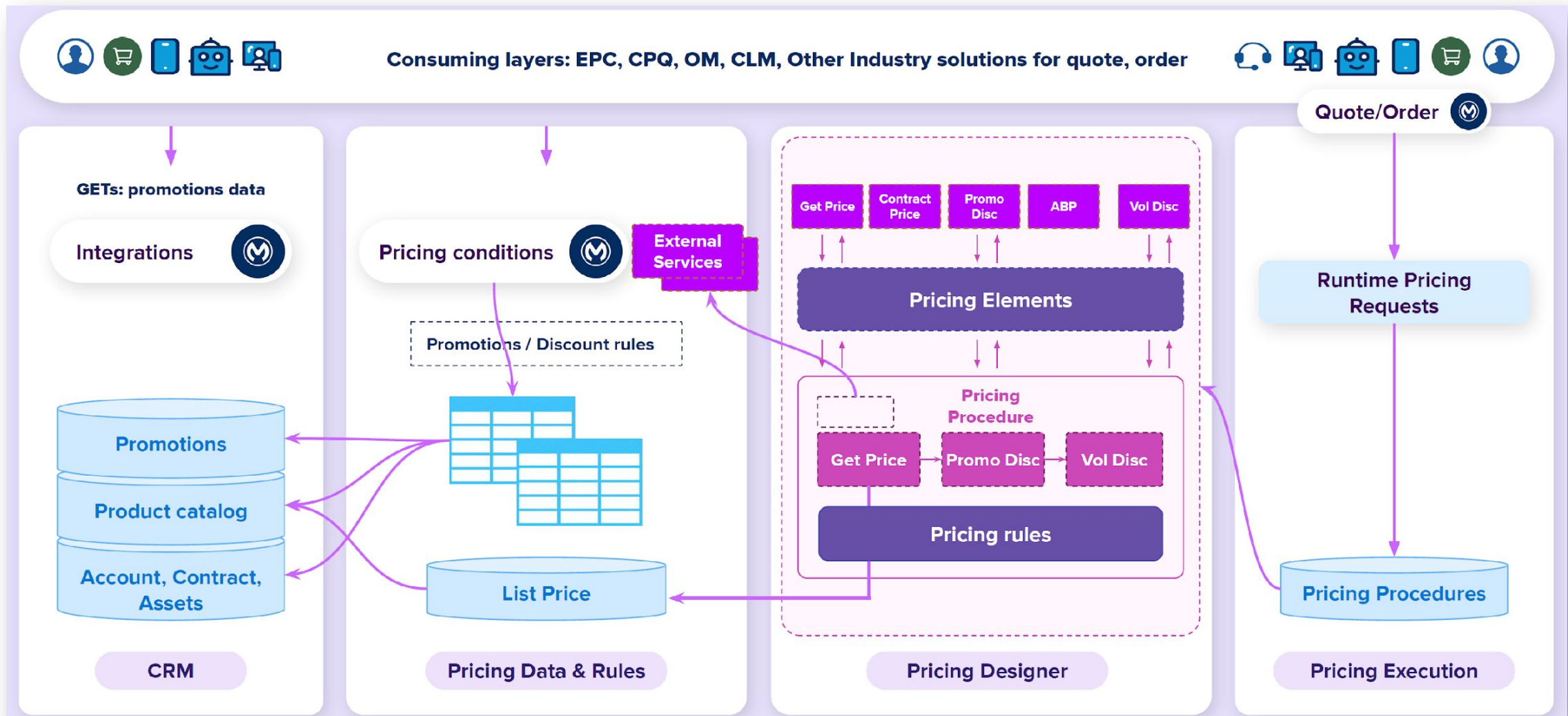
- **Price Management:** Involves Pricing Admins, Designers, Analysts, and Demand Managers.
- **Price Optimization:** Handled by Revenue Growth Managers, Demand Managers, and Pricing Analysts.
- **Price Monitoring:** Conducted by Sales Reps, KAMs, and the CFO's office.
- **Price Execution:** Managed by Sales Reps and Buyers.



Salesforce Pricing Components



Pricing End-to-End Flow



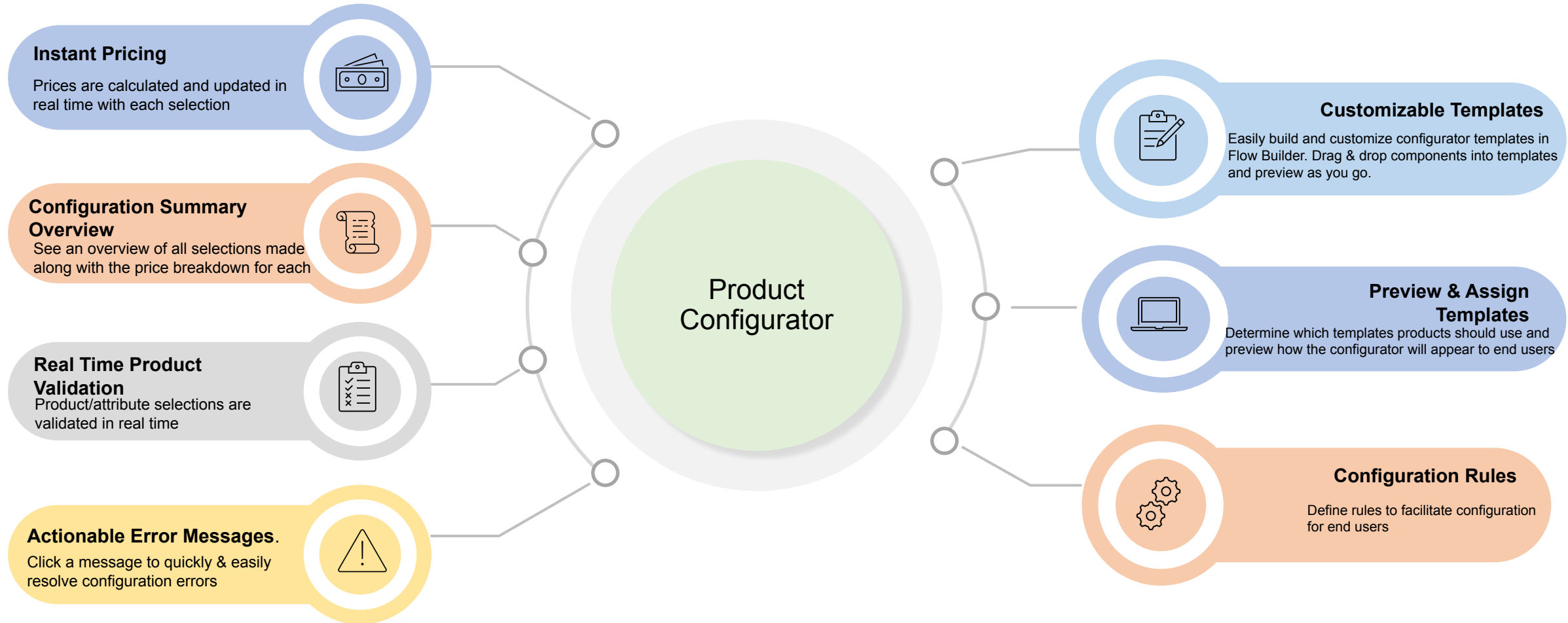
Product Configurator (CPQ)

Product Configurator

- The **Product Configurator** for ARM 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 top section shows the main product configuration with a price of €100.00 and a quantity of 1. Below this, the 'Contract Details' section includes a 'Contract Term' dropdown set to '1 Year'. The '5G Mobile Plan Group' section contains five add-on options, each with a checkbox, a quantity selector, and a purchasing option dropdown: 'Add-Ons', 'Long Distance Plan', 'Mobile Services', 'Phone Number', and 'Sim Card'. The right sidebar provides a 'Summary' of the configuration, including 'Contract Term: 1 Year', 'Out-Of-Bucket Speed: 512 kbps', '5G/4G/LTE (unlimited Domestic)', and 'Voice: Unlimited Domestic'. It also lists the selected add-ons with their respective quantities and net amounts. At the bottom right, there are buttons for 'Cancel' and 'Save & Exit'.

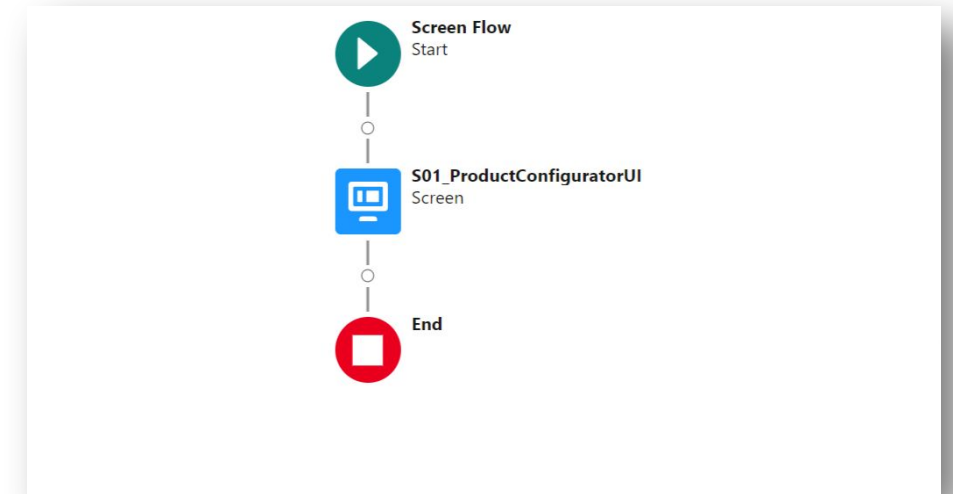
Product Configurator



Out-of-Box Flow Template

Default Out-of-Box Flow Template

- **Pre-built Configuration Flow**
 - A default Product Configurator Flow template is provided, ready to use right out of the box.
- **Customizable Layout**
 - Admin users have the flexibility to update component properties, allowing for personalized changes to the look and feel of the configuration interface.



This provides a balance between quick deployment and customization, ensuring that the flow can be tailored to specific business needs.

ARC Configuration

Amend, Renew & Cancel

- **Amend Existing Assets**
 - **Update & Reconfigure:** Easily amend existing assets to update quantities and attributes, with quick pricing and validation.
- **Intuitive User Experience**
 - **View Changes:** The enhanced summary component provides clear labels to view changes and delta pricing during the amendment workflow.
- **Cancellation**
 - **Cancel Assets:** Users can cancel an asset directly from the Configurator, with proper user confirmation to ensure accuracy.

Configure Laptop Pro Bundle

Return to Amendment Quote for Tony Demo

Laptop Pro Bundle
The laptop pro bundle includes a Laptop, mouse, warranty for 2 years, premium support and printer bundle

€1,150.00
One Time

Quantity: 2 → 5 (+3)

Net Unit Price: €1,150.00

Delta Amount: €3,450.00

LAPTOP

Antivirus
Quantity: 0 → 5 (+5)
Delta Amount: Included
New

Laptop
Quantity: 2 → 5 (+3)
Delta Amount: Included
Update (2)

ACCESSORIES

Mouse
Quantity: 2 → 0 (-2)
Delta Amount: Included
Cancel

One Time Delta Total
€3,450.00

Cancel Save & Exit

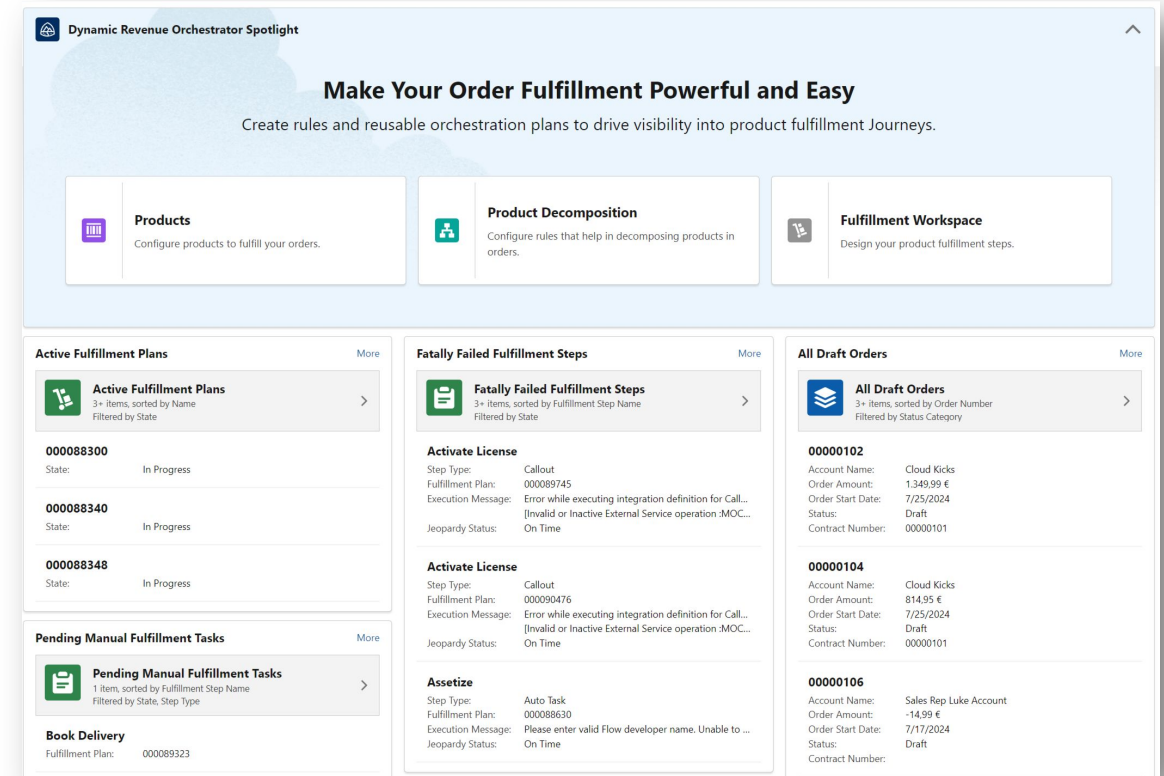
Dynamic Revenue Orchestrator (DRO)

Dynamic Revenue Orchestrator

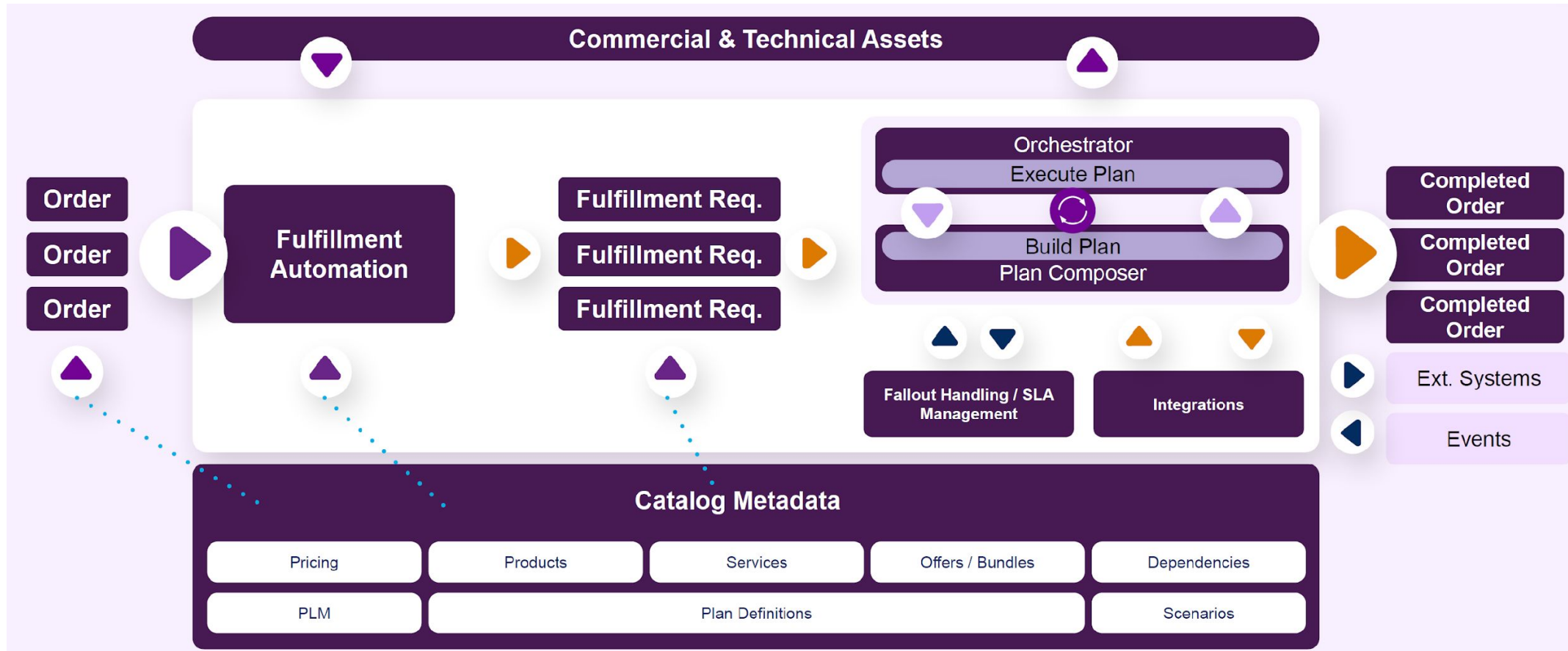
Salesforce Dynamic Revenue Orchestrator (DRO)

Transforming Complex Order Processes with Flexibility & Efficiency

- **What is DRO?**
 - A powerful tool that enables businesses to decompose and orchestrate intricate order processes with ease.
- **Key Features**
 - **Decomposition:** Break down products and order lines to apply custom fulfillment plans for each.
 - **Orchestration:** Seamlessly coordinate complex workflows and ensure smooth operations.
 - **Jeopardy Management:** Monitor potential risks and proactively address issues that could impact order fulfillment.
 - **Fallout Management:** Handle exceptions and failures efficiently to maintain operational continuity.

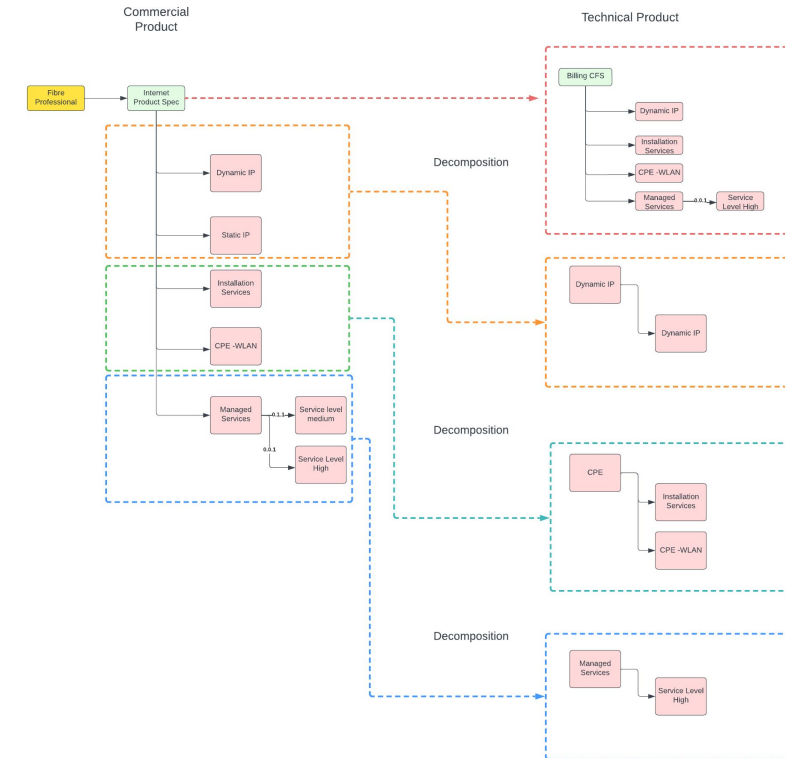


Functional Architecture



Decomposition

- **What is Decomposition?**
 - **Decomposition** refers to breaking down a customer order into smaller, manageable steps.
 - **Example:** When a customer orders a phone, the process decomposes into tasks such as:
 - Shipping
 - Provisioning a SIM card
 - Checking credit, and more.



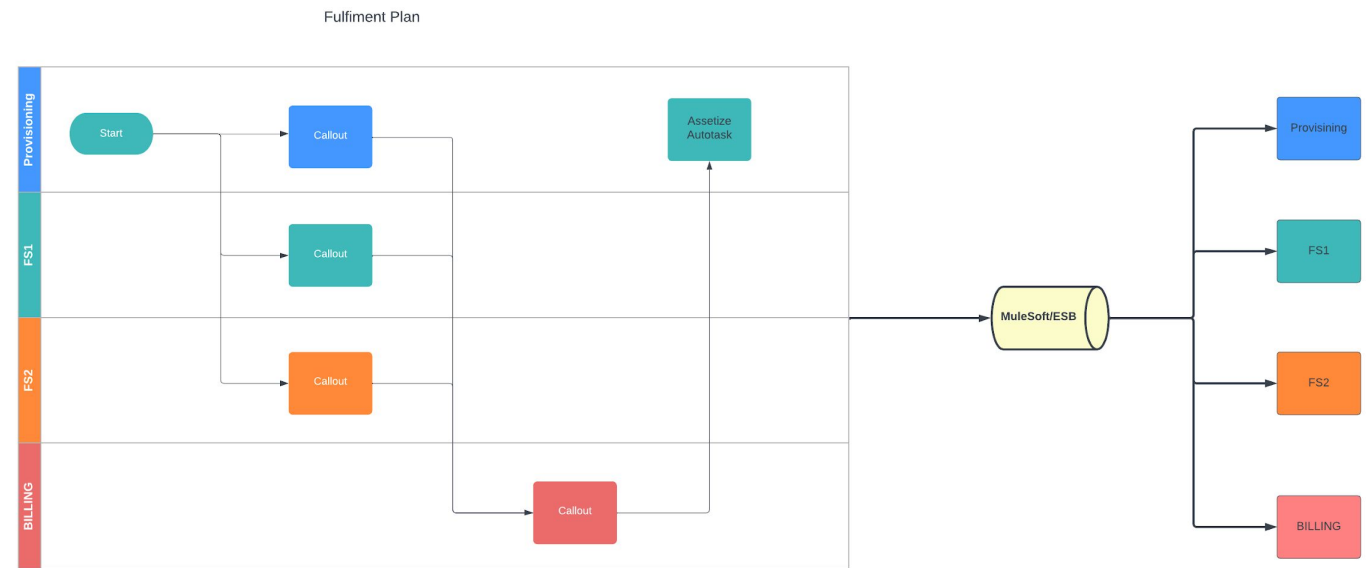
Fulfilment Designer

After Decomposition:

- Once order items are decomposed, **Dynamic Revenue Orchestrator (DRO)** creates the steps required for fulfilment.
- **Fulfilment Designer:**
 - Defines fulfilment steps, dependencies and rules **before** the order is submitted
 - Ensures the correct sequence and conditions for the fulfilment steps.

Key Concepts in Fulfilment Design:

- **Fulfilment 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 fulfilment process.



Fulfillment Tasks Types

Callout

A task used for automated interactions with external Fulfillment systems (e.g. Billing, Shipping, Provisioning)

PAUSE EVENT

A task triggered by an attribute / field change on Order Items. Used for asynchronous communication with fulfillment systems

AUTO TASK

A task triggered to perform internal processing of data in preparation for a fulfillment system interaction

MILESTONE

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

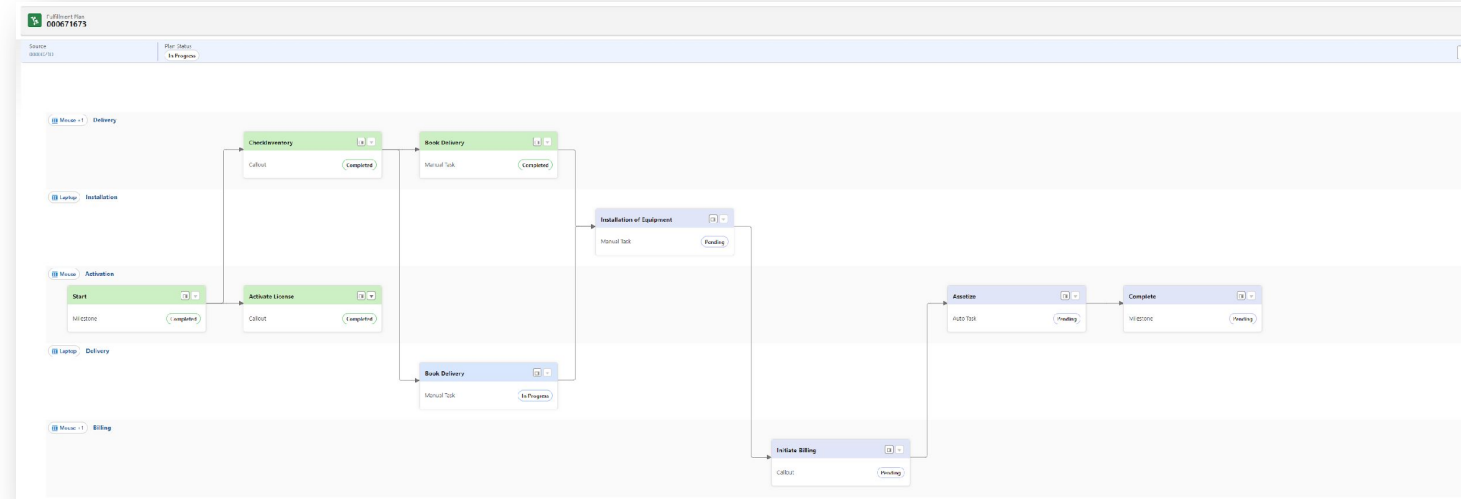
MANUAL TASK

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

Runtime Monitoring

Key Features :

- **View and Manage Fulfillment Steps**
 - The **Fulfillment Plan** shows each step as it progresses through the fulfillment pipeline.
 - Operators can **view the status** of steps, track dependencies, and manage issues directly from the plan.
- **Fulfillment Plan Actions**
 - Take action directly from the plan:
 - **Pause, resume, or retry steps** based on fulfillment progress.
 - Gain deeper insights by reviewing information about individual steps and how they fit into the broader fulfillment process.
- **Bulk Retry or Complete Failed Steps**
 - From a list view or queue, operators can **retry or complete multiple failed fulfillment steps in bulk**.
 - This saves time by allowing operators to handle several failed steps at once.
 - **Bulk completion** bypasses errors that might otherwise prevent a step from completing, ensuring that fulfillment continues smoothly.



Demo

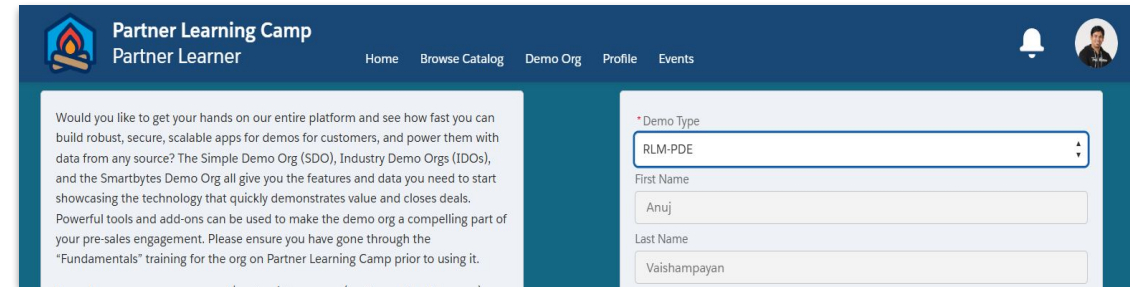
Getting Hands On

If you are a Salesforce Partner or employee, spin up a “SDO” Demo Org from Partner Learning Camp

Note that this demo org will expire in 1 month – you can raise a support case on the Partner Community to extend for 1 year

This demo org has ARM enabled, but it is mostly not configured, so you will have to follow the steps in the Salesforce Help documentation to create products and attributes, enable and configure Salesforce Pricing, and so on.

Optionally, use the Trialforce ID to spin up an org that has some of the setup already completed. See [ARM Partner Pocket Guide on Partner Community](#).



The screenshot shows the 'Partner Learning Camp Partner Learner' interface. The header includes a logo, navigation links (Home, Browse Catalog, Demo Org, Profile, Events), a notification bell, and a user profile. The main content area has a text block on the left explaining the purpose of the demo org and a form on the right. The form includes a 'Demo Type' dropdown menu with 'RLM-PDE' selected, and input fields for 'First Name' (Anuj) and 'Last Name' (Vaishampayan).

Partner Learning Camp
Partner Learner

Home Browse Catalog Demo Org Profile Events

Would you like to get your hands on our entire platform and see how fast you can build robust, secure, scalable apps for demos for customers, and power them with data from any source? The Simple Demo Org (SDO), Industry Demo Orgs (IDOs), and the Smartbytes Demo Org all give you the features and data you need to start showcasing the technology that quickly demonstrates value and closes deals. Powerful tools and add-ons can be used to make the demo org a compelling part of your pre-sales engagement. Please ensure you have gone through the "Fundamentals" training for the org on Partner Learning Camp prior to using it.

* Demo Type
RLM-PDE

First Name
Anuj

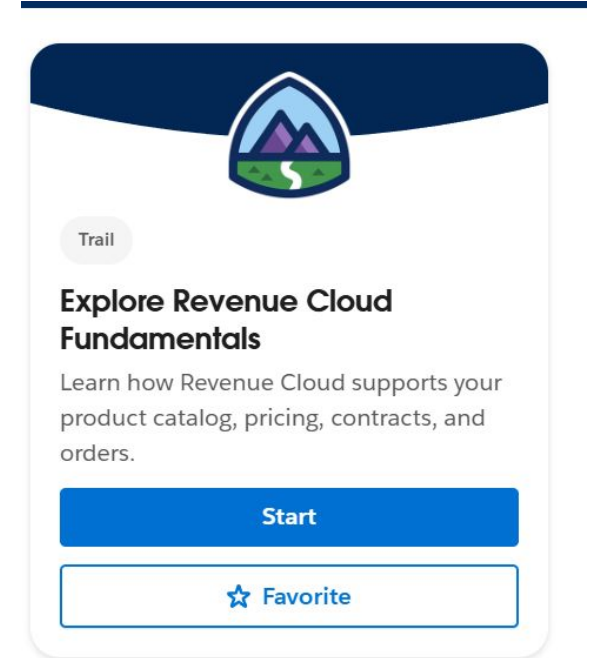
Last Name
Vaishampayan

Enablement Resources

Check out the [Salesforce Help documentation](#)

Check out the ARM module on [Trailhead](#) (note the listed industries – interesting!)

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





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