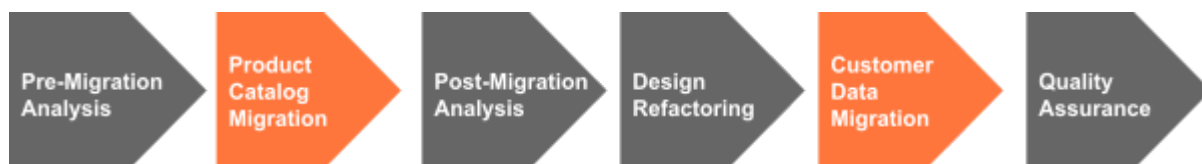# Revenue Cloud Migration

Accelerating your Salesforce CPQ to Revenue Cloud transition with our unique tools and refactoring approach

ideaHelix Migration Approach

KEY STEPS

Pre-Migration Analysis
Our Best Practice tool evaluates the current implementation against Salesforce CPQ best practices to identify areas of improvement before the migration starts.

Product Catalog Migration
Automatically convert supported product catalog elements of your Salesforce CPQ solution into the Revenue Cloud format.

Post-Migration Analysis
Evaluate the migrated configuration against Salesforce Revenue Cloud best practices to identify areas of improvement.

Design Refactoring
For the components that cannot be migrated automatically, we will work with you to redesign, reimplement, replace or retire, utilizing as much out of the box capability as possible

Customer Data Migration
Automatically convert transactional data (quotes, orders) and inventory (contracts, subscriptions and assets) into Revenue Cloud format.

Quality Assurance
Automated and semi-automated testing of key Revenue Cloud CPQ capabilities with the migrated and refactored solution components.

KEY BENEFITS

Early Risk Identification

IdeaHelix's Revenue Cloud Migration approach proactively identifies customizations and deviations early, significantly reducing risks. By addressing potential issues upfront, it ensures a smooth and reliable and successful migration experience.

Optimized Design, Less Tech Debt

IdeaHelix's expert-led design refactoring effectively realigns legacy Salesforce CPQ configurations with Revenue Cloud's advanced features. This optimizes operations, simplifies future maintenance, and maximizes system value.

Automated Migrations

Advanced automation tools from IdeaHelix swiftly migrate catalog and customer data. This streamlined process improves accuracy while reducing manual effort, and migration costs, allowing a quicker transition to Salesforce Revenue Cloud.

Continuous Quality Assurance

IdeaHelix's robust testing framework automates validation, significantly reducing manual efforts. Consistent validation maintains high-quality outcomes, enabling internal resources to focus on innovation and strategic initiatives.

Enhanced Stability & Performance

IdeaHelix's Best Practice Assurance tool ensures sustained system stability and optimal performance post-migration. Aligning with Salesforce standards prevents common pitfalls and maintains reliability.

Better Program Outcomes

IdeaHelix provides a structured, proven methodology backed by deep Salesforce expertise. Organizations gain predictable, successful outcomes and confidence from a trusted partner with a strong track record in Salesforce migrations.

About ideaHelix

An industry-focused Salesforce consulting partner and tools developer, specializing in Revenue Cloud, Salesforce Industries and emerging Agentforce and AI capabilities to help customers eliminate inefficiencies, refactor workflows, streamline migrations and future-proof investments.