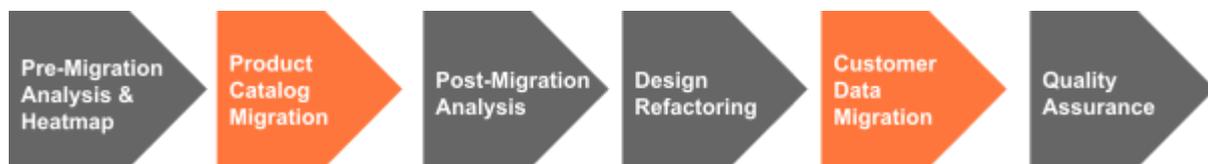


Revenue Cloud Migration

Accelerating Salesforce CPQ to Agentforce Revenue Management (ARM) transition with unique tools



ideaHelix Migration Approach

KEY STEPS

Pre-Migration Analysis

We analyse the current implementation against Salesforce CPQ best practices and produce a heatmap to assess the level of customization.

Product Catalog Migration

Automatically convert supported product catalog elements of your Salesforce CPQ solution into the ARM format.

Post-Migration Analysis

Evaluate the migrated configuration against Salesforce and ARM 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 ARM format.

Quality Assurance

Automated and semi-automated testing of key ARM CPQ capabilities with the migrated and refactored solution components.

KEY FEATURES

Core Product Catalog Migration

Product and Attribute Migration: Enables complete transfer of Salesforce CPQ product data — including standard products, bundles, and attributes — into ARM.

Product Hierarchy Mapping: Migrates complex product hierarchies and bundles with nested features and options to ARM Product Catalog Management (PCM).

Attribute Picklist Mapping: Converts CPQ configuration attributes and picklist values into PCM attributes with proper dependency mapping.

Pricing and Discount Migration: Migrates CPQ Discount Schedules and pricing logic to ARM Price Books and Pricing Rules.

Customer Data Migration

Inflight Quote Migration: Transfers active CPQ quotes to ARM Standard Quotes, retaining pipeline and approval visibility.

Subscription and Asset Migration: Moves existing subscriptions and assets into Contract Asset Lifecycle Management (CALM) enabling

lifecycle control for renewals, amendments, and service operations.

Automation & Mapping Capabilities

Automated Metadata Detection: Scans source org metadata to identify all CPQ objects.

Custom Mapping via Metadata Records: Allows declarative definition of object-to-object mappings through Custom Metadata records.

Partial Batch Processing: Handles large data volumes gracefully by disabling all-or-none transactions.

Managed Package Governance

Packaging of Migration Tool as Managed Package: Wraps the tool into a Managed Package for controlled installation and upgrade.

Security Compliance: Aligns with Salesforce Security Review standards for CRUD/FLS governance and namespace safety.

KEY BENEFITS

Early Risk Identification

Our 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.

Automated Migrations

Our advanced automation tools swiftly enable end-to-end product and attribute migration. This includes bundle, feature and option hierarchy mapping improves accuracy while reducing manual effort, migration costs, and time-to-value.

Enhanced Stability & Performance

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

Optimized Design, Less Tech Debt

Our expert-led design refactoring realigns legacy Salesforce CPQ configurations with Revenue Cloud's advanced features, optimizing product structures, attribute dependencies, and pricing logic to simplify future maintenance and maximize system value.

Continuous Quality Assurance

Our robust testing framework leverages automated metadata detection and batch validation to reduce manual testing. Declarative custom mapping through metadata records ensures consistent validation, enabling teams to focus on innovation and business growth.

Better Program Outcomes

We provide a structured, proven methodology backed by deep Salesforce expertise. In-flight quote and subscription migration ensures business continuity during transition phases, providing predictable outcomes and long-term ARM success.

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.