



Agentforce Revenue Management

Quickstart Migration Guide
from Salesforce CPQ



Why Migrate to Agentforce Revenue Management

Over 1,000 Salesforce customers have adopted Agentforce Revenue Management (ARM), formerly Revenue Cloud Advanced (RCA). They're gaining native AI capabilities, faster performance, and a modern architecture built to scale.

Why Migrate Now?

- **Native AI** - sales teams quote faster with guided recommendations
- **Faster performance** - complex configs without the wait time
- **Scalable architecture** - built to grow with your business
- **Flexible pricing engine** - handle any scenario without custom code
- **Unified quote-to-cash** - fewer handoffs, faster deal cycles

Migration Impact

<p>>10x Catalog Rationalization</p>	<p>80% Performance Improvement</p>	<p>70% Less manual work</p>	<p>60% Faster Quoting</p>
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*Data Source: These are representative benefits from ideaHelix customers



The ideaHelix Approach

Our proven methodology ensures successful migrations

1. ASSESS

We analyze your CPQ org, flag customizations, benchmark against best practices and size the migration effort.

2. AUTOMATE

We migrate your catalog, pricing, assets, subscriptions, quotes and orders automatically.

3. REFACTOR

We optimize your catalog to remove duplicates, flatten bundles and swap custom code with out-of-the-box features.

4. VALIDATE

We automate testing across pricing, configs, and assets; every migrated element is verified before go-live.



Migration Checklist

A step-by-step guide to successful migration

ASSESS

- 1 Know what you have** - Catalog size, pricing patterns, custom code, integrations. Surface obstacles and size the effort.
- 2 Decide what moves** - Migrate as-is, modernize, or retire. Not everything deserves to make the trip.
- 3 Set up for success** - Naming standards, ID strategies, ownership. Clean foundations make clean migrations.

AUTOMATE

- 4 Move the catalog** - Products, bundles, attributes, price books. Sales keeps quoting.
- 5 Preserve config logic** - CPQ rules become ARM constraints. Same outcomes, modern platform.
- 6 Keep pricing right** - Tiers, discounts, derived pricing, in-flight quotes. Every scenario is validated.
- 7 Bring the installed base** - Subscriptions & assets migrate so renewals and amendments work from day one.



Migration Checklist Continued

A step-by-step guide to successful migration

REFACTOR

- 8 **Simplify the catalog** - Eliminate duplicates, normalize attributes, flatten bundles. Less complexity = better performance.
- 9 **Modernize custom code** - Replace bespoke logic with declarative where possible. Keep only what's unavoidable.

VALIDATE

- 10 **Test everything** - Pricing, configs, asset lifecycle, integrations. Automated test packs, clear pass/fail.
- 11 **Prove it scales** - Bulk scenarios, throttling, monitoring. Enterprise-grade before go-live.
- 12 **Go live with confidence** - Controlled cutover, rollback plan, support runbook. No drama.



Quickstart: 8-Weeks to Live

A working MVP in two months. Here's how.

- Week 1** : Deep Dive - Discovery questionnaire, reverse demo and workshop
- Week 2** : Tools Install - Org review, migration recommendations, MVP scope locked
- Week 3-4** : MVP initiation - Migration workshop, initial catalog & product migration, Demo 1
- Week 5-6** : Quotes & Orders - Advanced configurator, Amendments & Renewals, Demo 2
- Week 7-8** : Subscriptions & Assets - Final Demo, Quickstart Program read-out

What you get

- Working ARM environment with initial product family
- Migrated pricing rules and approval workflows
- Validated quote-to-cash process
- Level of effort estimate for full migration

The Tools That Make It Possible

Less effort. Lower risk. Faster time to value.



available on
AppExchange

ARM Migration Tool

Automated migration of products, pricing, bundles, and customer data. It handles the tedious stuff so your team focuses on decisions.

- Product Catalog
- Pricing
- Bundles
- Customer Data

Best Practice Assurance

300+ expert rules that catch config problems before they cause production issues. Run our tool anytime during planning, build, or DevOps.

- CPQ
- Agentforce Revenue Management
- Comms Cloud
- Media Cloud
- OmniStudio

Test Automation Framework

Write tests in Excel. Run them in CI/CD. No coding required. Business users and QA collaborate on the same test cases.

- UI, API & Apex Test Cases
- GitHub ready
- Codeless Test Creation
- Dynamic Data Handling

Case Study: REI

Leading Specialty Manufacturer's Revenue Management Transformation



The Challenge

REI faced significant performance challenges with their Salesforce CPQ implementation. Complex product configurations led to slow quote generation and a bloated product catalog made maintenance difficult. REI ran an ARM pilot with ideaHelix.

The Results

2,000 → 165

Product Catalog Rationalization

80%

CPQ Performance Improvement

60%

Faster Quote Generation

Salesforce pointed us to ideaHelix, and their hands-on product expertise helped simplify our complex product catalog and show us a clear, practical path to Agentforce Revenue Management.

Chip Boeneke, VP of Technology, REI



Let's Talk

Three steps to get started

1. Discovery Call

30 minutes. We learn your CPQ situation, you learn our approach. We listen first.

2. Free Assessment

We analyze your org and give you a realistic migration scope. Yours to keep either way.

3. Kickoff

If it makes sense, we start your 8-week Quickstart program with a dedicated team.

Ready to move?

contact@ideahelix.com

www.ideahelix.com



Who We Are

ideaHelix is a Salesforce Summit Consulting Partner specializing in Agentforce Revenue Management and Agentforce for Industries, combining deep industry expertise and automation tools to deliver best-practice aligned outcomes.

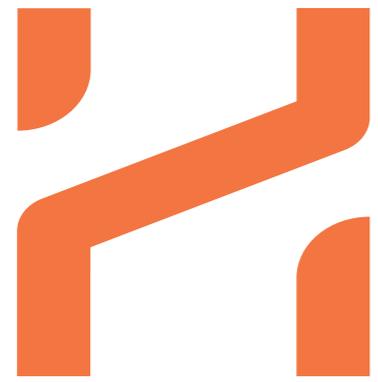


What we bring

- 50% lower risk with our automation tools
- 100+ successful projects delivered by our experts
- 500+ Certifications, including Revenue Cloud and CPQ specialists
- Proven, best-practice delivery methodology

ideaHelix is a trusted Revenue Cloud partner - combining automation tools, proven expertise, and a deep understanding of the platform to deliver faster, smarter implementations.

Meredith Schmidt,
EVP, Revenue Cloud, Salesforce



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Agentforce Revenue Management. Done Right.

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