

Revenue Cloud / ARM QuickStart

Accelerate Your CPQ-to-ARM Migration with AI-Powered Revenue Intelligence

As Salesforce's CPQ product transitions to Advanced Revenue Management (ARM), organizations face a critical window to modernize their quote-to-cash architecture. Datacolor.ai brings deep Revenue Cloud expertise, co-developed the Salesforce Connector for Informatica IDMC SaaS, and augments every engagement with Agentforce-powered AI agents that automate renewals, new quotes, and revenue intelligence — delivering measurable outcomes from day one. Datacolor.ai is a **Salesforce Select Partner** and **Informatica Platinum Partner**.

40%

Faster CPQ-to-ARM Migration

60%

Improvement in Data Quality

3×

Faster Time-to-Value

What's Included — Core Scope

Consultation & Discovery

- Current-state CPQ architecture assessment & migration readiness scoring
- ARM/Revenue Cloud roadmap design workshop
- Data quality baseline via Informatica IDMC health check
- Agentforce use-case identification for renewals, new quotes & revenue forecasting
- Go-live success metrics & KPI definition

Salesforce ARM Configuration

- Advanced Revenue Management (ARM) baseline implementation
- Product catalog, Product Bundles, Pricebooks — migrated and restructured
- Quote-to-Order lifecycle: Contracts, Amendments, Renewals, Asset-Based Ordering
- Custom branded Quote document (up to 1 output template)
- Price Rules, Product Rules, Discount Schedules
- Revenue Recognition Rules, General Ledger Rules, Tax Rules, Legal Entities
- Billing: Invoice generation, Dunning Notices, Payment Gateway integration
- ERP/Financial system data flow (1 integration — Standard tier; 2 — Premium tier)
- User Profiles, Roles, Permission Sets

Agentforce Revenue Agents

- Renewal & Expansion Quote Agent — AI-driven contract renewal proposals with upsell prompts
- New Quote Agent — guided configuration and pricing automation for net-new opportunities
- Revenue Forecast Agent — real-time pipeline intelligence and anomaly detection
- Agent grounding via Salesforce Data Cloud + Informatica IDMC clean data layer

Informatica IDMC Data Layer

- Pre-migration data profiling and cleansing of Account, Contact, Product, Contract records
- Duplicate detection and master data consolidation using Informatica MDM capabilities
- Ongoing data quality monitoring with automated quality score dashboards
- Salesforce Connector for Informatica IDMC SaaS — co-developed by Datacolor

Data Migration

- Client-cleansed data required prior to kickoff
- Standard: Up to 400 Products, 1 Currency, 2 Pricebooks
- Premium: Up to 500 Products, 2 Currencies, 2 Pricebooks
- CPQ legacy object mapping and ARM field transformation templates provided

Resources & Enablement

- Dedicated Senior Business Analyst / Project Manager
- Revenue Cloud Certified Solutions Architect
- Informatica IDMC Certified Data Engineer
- Agentforce implementation specialist
- Knowledge transfer / Train the Trainer sessions
- 4-week post-go-live hypercare support included

Engagement Tiers

Feature	STANDARD	PREMIUM
Duration	12-18 Weeks	20-25 Weeks
CPQ-to-ARM Migration Assessment & Roadmap	✓ Included	✓ All Standard tier deliverables, plus:
ARM Baseline Config	Products, Pricebooks, Quotes	2 Currencies / 2 Pricebooks / Up to 500 Products
Contracts, Amendments, Renewals, Asset-Based Ordering	✓ Included	Up to 20 Product Bundles
Products Supported	1 Currency / 2 Pricebooks / Up to 400 Products	Up to 20 custom fields
Custom Fields	Up to 15 (Product, Quote, Quote Lines)	Up to 5 User Profiles
User Profiles	Up to 3	1 Supported Tax Package integration
Price Rules / Product Rules	Up to 10 / 10	2 ERP data flows
Discount Schedules	Up to 5	Revenue Forecast Agent (Agentforce) — advanced
Billing Rules	4 Billing Rules, 4 Tax Rules, 4 GL Rules	Informatica MDM duplicate resolution & ongoing monitoring
Revenue Recognition Rules	4 Revenue Recognition Rules / 2 Legal Entities	Data quality score dashboards (Salesforce + Informatica)
Invoice / Payment Gateway	1 Invoice Document / 1 Payment Gateway	RevenueIQ™ Agent Suite eligibility assessment
ERP Data Flow	1 ERP data flow integration	Up to 10 hrs Knowledge Transfer / Train the Trainer
Agentforce Agents	Renewal & Expansion Quote Agent + New Quote Agent	✓ Included (advanced)
Informatica Data Profiling	✓ Pre-migration profiling & cleansing	✓ Included
Knowledge Transfer	Up to 5 hrs	Up to 10 hrs
Price	\$35K-\$75K	\$85K-\$120K 20-25 Weeks

Key Benefits

 Rapid Migration — Purpose-built CPQ-to-ARM accelerators reduce migration time by 40% compared to greenfield implementations.	 AI-Native from Day One — Agentforce Renewal, New Quote, and Forecast Agents are woven into the implementation — not bolted on later.
 Trusted Data Foundation — Informatica Platinum Partner expertise ensures clean, governed data powers every AI agent and revenue workflow.	 Measurable Outcomes — 60% improvement in data quality and 3× faster time-to-value are proof points delivered on real-world engagements.
 Clear Scope & Fixed Timeline — Defined deliverables, no surprise scope creep, with 4-week post-go-live hypercare included.	 Co-sell Ready — Datacolor's dual Salesforce/Informatica pedigree makes us the natural partner for Salesforce Revenue Cloud AEs driving ARM pipeline.

How It Works — Our Approach

01	02	03
Discovery & Assessment Current-state CPQ analysis, data quality baseline, Agentforce use-case alignment, and ARM migration roadmap definition.	Architecture & Design ARM data model design, Informatica integration architecture, Agent configuration blueprints, and sandbox environment setup.	Build & Configure ARM configuration, Agentforce agent deployment, Informatica data pipeline activation, and product catalog migration.
04	05	
Test & Validate Internal QA, client UAT sessions, Agentforce agent demonstration, and data quality verification reports.	Go-Live & Hypercare Production deployment, go-live support, and 4-week hypercare window with email support and minor implementation tweaks.	

Assumptions & Out of Scope

ASSUMPTIONS

- Client has cleansed source data prior to kickoff
- Refreshed Sandbox available at project start
- Requirements shared with Datacolor before kickoff
- Client SME available throughout engagement
- End-user training delivered by client via Train the Trainer
- Salesforce ARM licenses purchased and provisioned
- Informatica IDMC licenses in place (if data layer included)

OUT OF SCOPE

- Custom Apex/LWC development beyond specified limits
- Multi-language / multi-currency (beyond tier limits)
- Data cleansing and enrichment by Datacolor
- Third-party ISV integrations beyond payment/tax specified
- Custom invoicing beyond standard ARM billing
- Inventory management
- Change management or organizational training programs

Ready to Accelerate Your ARM Migration? Contact Datacolor.ai to start your Revenue Cloud QuickStart today.

The Datacolor.ai Team

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