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SALESFORCE GO FOR REVENUE CLOUD · WINTER '27

Subscription Selling Solution

Salesforce Go for Revenue Cloud Series · Episode 2

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INTRODUCTIONS

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- 10 years in Salesforce: Revenue Cloud and Steelbrick CPQ (Quote-to-Cash)
- 3 years on the Revenue Cloud Practice Lead team, Delivery Excellence (Salesforce)



OVERVIEW

Agenda

1. What is the Subscription Selling Solution?
2. The next steps it leaves to you
3. Limitations, and how I'd use it on a project
4. Demo

What is the
SUBSCRIPTION SELLING SOLUTION?

SUBSCRIPTION SELLING SOLUTION

A reference configuration, installed in one flow

- New in Salesforce Go with Winter '27
- Installs the Revenue Cloud foundation plus product catalog and pricing content in one automated flow
- Optional sample data: catalog, categories and pricing

Demo path

Setup › Salesforce Go › Revenue Cloud
Filter: Get Started
Subscription Selling Solution › Set Up
Standard Installation + Include Sample Data

Licence

Revenue Cloud Advanced · Enterprise, Unlimited or Developer Edition

REVENUE CLOUD · SUBSCRIPTION SELLING

QuantumBit Subscription Catalog: What Was Loaded

3	50	63	4
Catalogs	Products	Pricing options	Selling models

Catalog

Software, Hardware and Services catalogs, 9 categories

Subscription models

One-time, monthly and annual term, and monthly evergreen

Pricing

48 products priced, plus sample volume, attribute and bundle discounts

Bundles

5 bundles, from Starter to Enterprise

Configuration

Attributes and classifications for configurable products

Guided selling

Product discovery, eligibility rules and pricing procedures, live

Source: Winter ‘27 Revenue Cloud org · loaded 13 Oct 2026

REVENUE CLOUD · SUBSCRIPTION SELLING

Configuration Behind the Catalog

5
Pricing & discovery procedures

2
Qualification rule sets

5
Page layouts & record pages

0
Custom code or custom fields fields

Product discovery
Discovery context activated, so reps can search and filter products

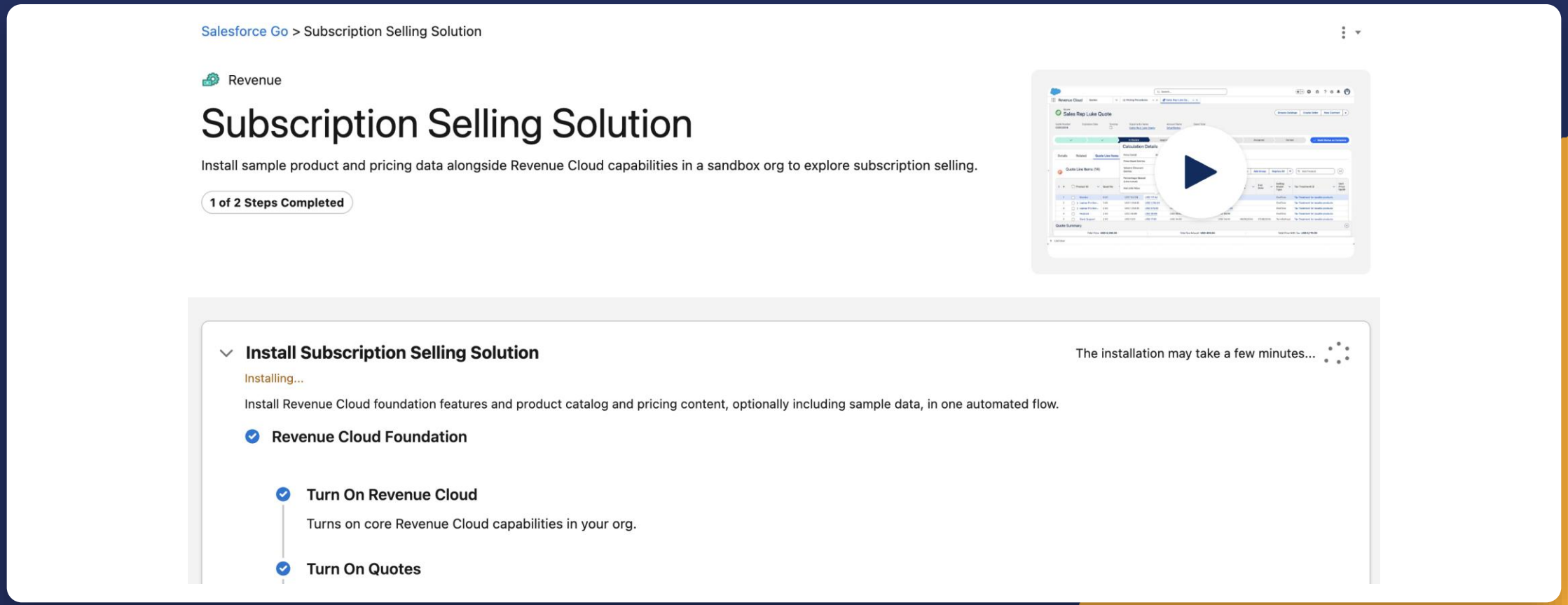
Eligibility rules
Product and category qualification rules decide what each customer can buy

Revenue Cloud UI
Product, catalog and attribute pages switched to Revenue Cloud layouts

Source: Winter ‘27 Revenue Cloud org · configured 13 Oct 2026

DEMO

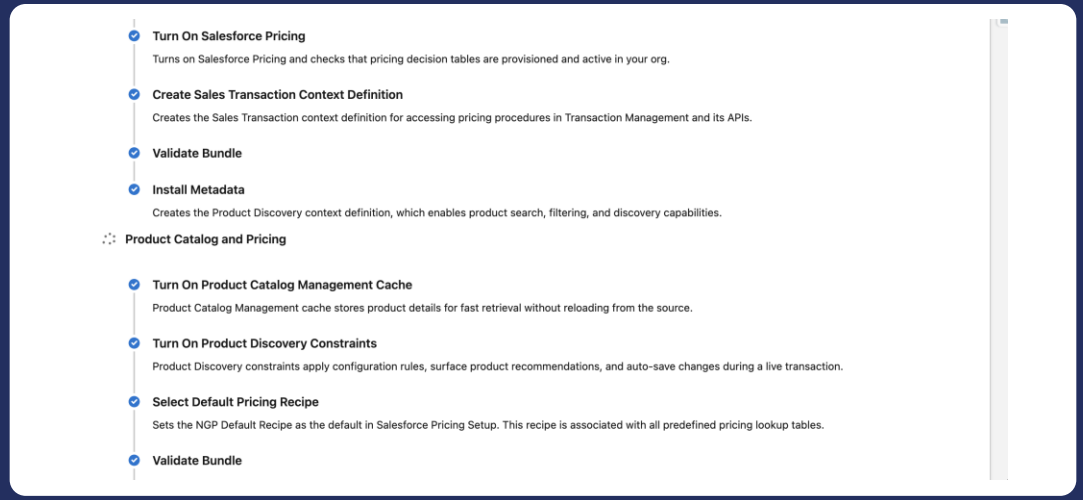
Installing the Subscription Selling Solution

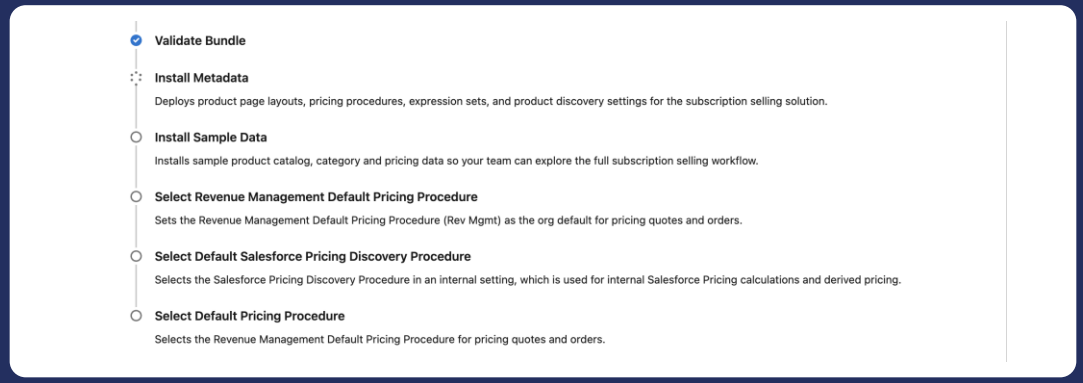


DEMO

What to watch for during the install

- Foundation finishes first; the catalog group starts after it
- Sample data installs inside the Product Catalog and Pricing group
- Rev Mgmt Default Pricing Procedure becomes the org default
- Done = "Installed" and "2 of 2 Steps Completed"
- Then "Take the Next Steps" appears: your manual checklist





Installing the Package on a Demo Org: What to Expect

Three issues we hit, and how to get ahead of them

01 Code coverage below 75%

The demo org's Apex coverage was under 75%, so the so the deploy was blocked.

Tip: Fix code coverage in the org before you start the install.

03 Catalog cache access

The catalog cache wouldn't work until access was granted.

Tip: Assign the Product Catalog Management Cache permission set license and permission set to the installing user.

02 Data load failures

219 records failed to load. We extracted the failed bulk jobs, fixed the data and reloaded it in dependency order.

Root causes

- Lookups still held source-org record IDs
- Selling models already existed under different names, so prices and options couldn't find them
- Picklists were missing a required Code, which blocked every attribute
- Some attribute links in the source data were wrong
- Running the load 3 times created duplicates that had to be cleaned up

Tip: Map source IDs to the target org first, reuse existing selling models, load parents before children, and run the load only once.

AFTER THE INSTALL: **TAKE THE NEXT STEPS**

TAKE THE NEXT STEPS

7 manual steps before your first quote

Step	Where	Why
1. Refresh the six decision tables	Setup › Decision Tables	Sample prices reach discovery and quoting
2. Set price adjustment schedule constants	Pricing procedure › Resource Manager	Volume, bundle and attribute discounts apply
3. Create PCM cache refresh flow	Schedule-triggered flow	Catalog cache stays current
4. Build snapshot index	Index and Search Configuration	Rebuild after any product or search change
5. Turn on indexing	Setup	Real-time search and discovery
6. Turn on dynamic facets	Setup	Filters follow catalog content
7. Turn on semantic search	Setup	Natural-language product search

https://help.salesforce.com/s/articleView?id=ind.revgo_use_the_rev_mgmt_subscription_selling_solution.htm&type=5

LIMITATIONS

What to watch out for

Limitation	Impact
A reference, not your design	Sample catalog and procedures need tailoring
Sample data is not your data	Replace it; CPQ migration is a separate plan
Manual next steps	Seven steps; use Go's list as a checklist
Record IDs in constants	Re-set after every refresh or deployment
Runs org by org	Plan how config reaches QA, UAT and production
License-gated	Needs Revenue Cloud Advanced

BEST PRACTICE

How I'd use it on a real project

Discovery demo org

Show stakeholders a working subscription quote in week one, before design starts

Design reference

Retrieve its pricing procedures and expression sets to compare with your own design

Team enablement

A training sandbox for admins and sales ops while while your real catalog is is built

Thank you



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