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Salesforce Go for Revenue Cloud

Accelerator Series · Episode 1

Khaled El Halabieh

INTRODUCTIONS

Khaled El Halabieh

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



Agenda

- What we heard at Dreamforce 2026
- Salesforce Go (Revenue Cloud)
- Demo

WHAT WE HEARD AT *DREAMFORCE 2026*

Two takeaways for Revenue Cloud teams

1. Meet sellers where they are

The front end is no longer just the Salesforce UI. Pricing, quoting and approval logic now show up in Slack, Claude and other AI assistants.

2. Speed of delivery through accelerators

Salesforce is shipping accelerators (Salesforce Go feature sets, templates, a CPQ Migration Assistant)



WHAT IS ***SALESFORCE GO***?

SALESFORCE GO

Discover, turn on, configure: one place

- Guided setup inside Setup, organised by business outcome rather than by setup page
- Turn features and feature sets on in one click; automated steps run for you
- Readiness checks flag prerequisites before you can turn anything on
- For Revenue Cloud: foundation setup, plus feature sets like Manage Billing and Dunning

Demo:

From Setup, in the Quick Find box > Salesforce Go

> Search “Revenue” to filter the Revenue Cloud features

The Problem:
Setting up Revenue Cloud Manually

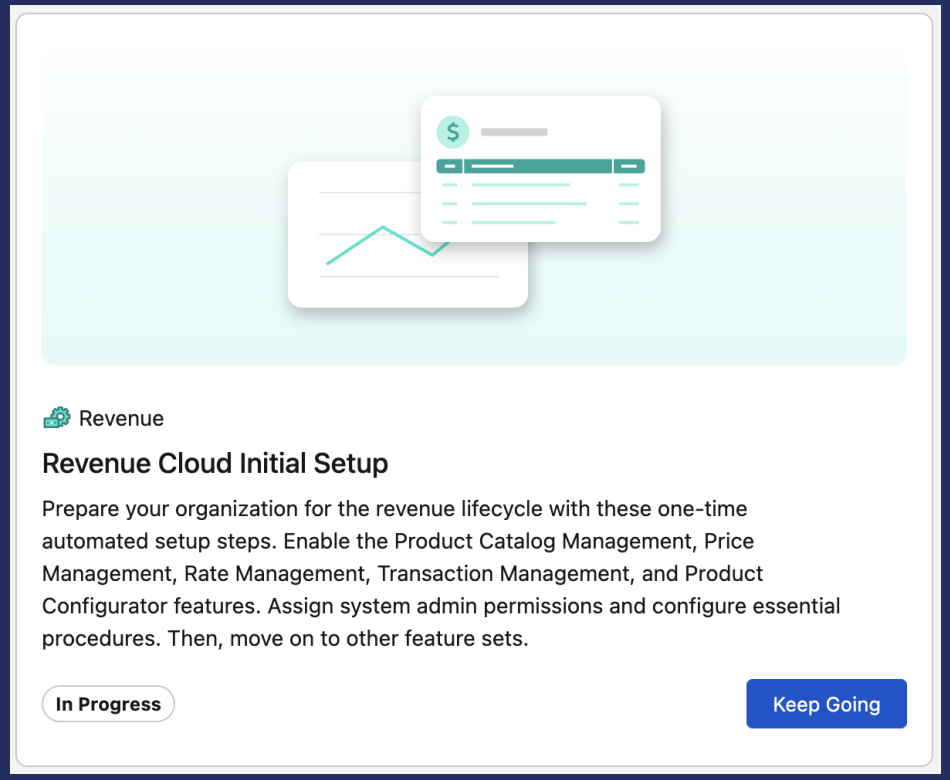
11 manual steps before your first quote

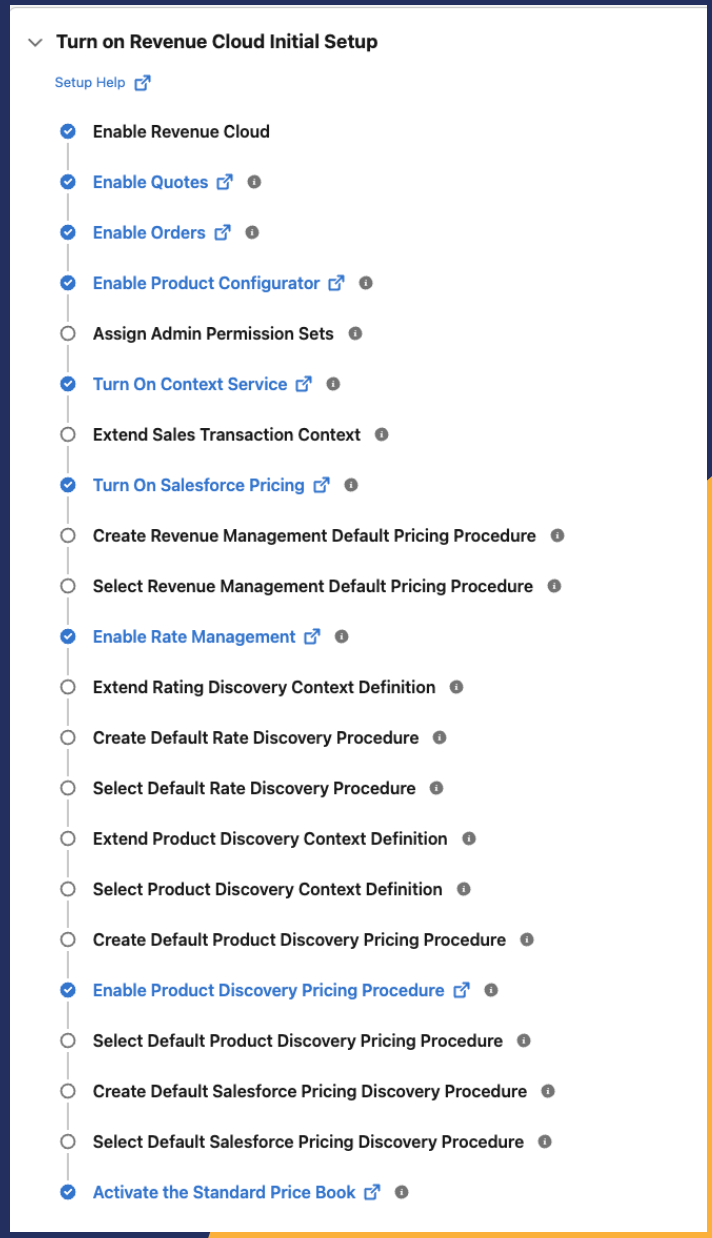
Manual step	*Go?*	*What it involves*
1. Assign permission set licenses	Partial	Revenue Cloud PSLs for admins and users
2. Assign permission sets	Partial	Admin, pricing, catalog and quoting permissions
3. Enable Revenue Settings	Yes	Core toggles in Setup > Revenue Settings
4. Turn on Salesforce Pricing	Yes	Pricing engine, context definitions, activated price book
5. Create or clone pricing procedures	Yes	Default pricing procedure ready to use
6. Connect procedures in Pricing Setup	Yes	Default procedure assigned
7. Update page layouts	No	Quote, Quote Line and Order layouts and components
8. Catalog, categories, selling models	No	Your product and commercial model
9. Create your first product	No	Product, selling model options, price book entries
10. Create and test a quote	No	End-to-end validation

https://help.salesforce.com/s/articleView?id=ind.qocal_turn_on_quote_and_order_capture.htm

Demo

Revenue Cloud Initial Setup





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DEMO

What to watch out for

Limitation	Impact
Not everything is automated	Manual steps remain; use Go's list as a checklist
Defaults, not your design	Default procedures need tailoring
Runs org by org	Plan how config moves across sandboxes
No data or migration	Products, prices and CPQ data need a plan
License-gated	Features stay locked without the right license

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Thank you



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