REVENUE SYSTEMS ARCHITECTURE

Claudeforce Prep Checklist

Five steps a Salesforce administrator can run before the September 2026 open beta reaches the org. Each step carries the reason it matters, the work in order, and field examples you can copy into your own inventory. The work holds its value whether or not you adopt the plugin.

Prepared by CWT Studio | Companion template: claudeforce-prep-template.xlsx | Version 1.0, September 2026

01 Collapse duplicate field definitions

An agent reads a field by its API name and reports whatever it holds. Two fields that mean the same thing produce two different answers to the same question, and the person asking has no way to tell which one ran.

The work, in order

- [ ] Export the field list for Account, Contact, Lead, Opportunity, and any custom object your pipeline depends on.
- [ ] Flag every pair where two fields carry the same meaning, then name the one that survives.
- [ ] Point reports, automations, and integrations at the surviving field before you deprecate the other.
- [ ] Write one sentence of description text on every surviving field, because that text is what an agent reads to decide what the field means.

Field examples

Field label	API name	Keep or retire	Definition an agent can use
Annual Revenue	`AnnualRevenue`	Keep	Company revenue for the last closed fiscal year, in USD, sourced at qualification.
Revenue (Est)	`Revenue_Est__c`	Retire	Sales estimate entered by hand. Duplicate of AnnualRevenue.
Contract Value	`Contract_Value__c`	Keep	Total committed value of the signed contract, in USD, excluding renewals.
Deal Size	`Deal_Size__c`	Retire	Undefined. Sometimes ARR, sometimes total contract value.
Renewal Date	`Renewal_Date__c`	Keep	First day the customer can terminate or renegotiate.

02 Write entry criteria for every pipeline stage

Stage is the field every forecast rests on. When entry criteria live in someone's head, the records in a stage do not match the label on it, and an agent asked about pipeline health returns a confident number built on that mismatch.

The work, in order

- [ ] For each stage, write the conditions a record must meet to enter it, in fields an agent can check.
- [ ] Query the records currently in each stage against those conditions and list the ones that fail.
- [ ] Correct or move the failing records before the connection, because the plugin reads the state you leave behind.
- [ ] Publish the criteria where the team reads them, then hold the definition still for a full quarter.

Field examples

Stage	Entry criteria in fields	Owner	Exit trigger
01 Qualified	`Budget_Confirmed__c = true, Primary_Contact__c populated, Close_Date within 2 quarters`	Rep	Discovery call completed and notes logged
02 Discovery	`Pain_Documented__c = true, at least one Opportunity Contact Role with Decision Maker`	Rep	Scope approved by the buyer in writing
03 Proposal	`Amount > 0, Proposal_Sent_Date__c populated`	Rep	Buyer responds to the proposal
04 Negotiation	`Legal_Review_Status__c in {In Review, Approved}`	Manager	Signature or a written loss reason
05 Closed Won	`Contract_Signed_Date__c populated, Amount locked`	Finance	Handoff record created

03 Audit permissions against intent

Access inherits your existing sharing rules and permission sets. A profile that was too broad while nobody looked stays too broad through the plugin, and the first person to ask a wide question finds out what they can reach.

The work, in order

- [ ] List every profile and permission set that grants View All, Modify All, or View All Data.
- [ ] Name the business reason for each grant, and remove the ones with no reason.
- [ ] Check field-level security on compensation, margin, legal, and personal data fields.
- [ ] Re-run the check after the audit, because permission sets stack and one assignment can restore what you removed.

Field examples

Object or field	Grant to review	Reason on record	Action
Opportunity	`Modify All on the Sales profile`	None found	Remove and replace with a sharing rule scoped to the team
Opportunity.Margin__c	`Read for all internal users`	Finance reporting only	Restrict to the Finance permission set
Contact.Personal_Email__c	`Read for all internal users`	Support escalation	Restrict to Support and Sales, log the decision
Account	`View All Data on the Ops profile`	Data loads	Replace with a scoped integration user
Contract	`Read for all internal users`	None found	Restrict to Legal and Finance

04 Move validation off page layouts

A field marked required on a layout is not required to the API. An agent writing through the API never loads a layout, so every rule that lived there stops existing the moment the write comes from somewhere else.

The work, in order

- ☐ List the fields your team believes are required, then check whether the requirement is on the layout or on the object.
- ☐ Recreate each layout-level requirement as a validation rule or a required field on the object.
- ☐ Write the error message in language a person can act on, because an agent will surface that message verbatim.
- ☐ Test each rule with an API write, not a screen save.

Field examples

Requirement	Where it lives now	Replace with	Error message
Close reason on a lost deal	Page layout	Validation rule: ISPICKVAL(StageName,'Closed Lost') && ISBLANK(TEXT(Loss_Reason__c))	Set a loss reason before closing this deal as lost.
Amount on a proposal	Page layout	Validation rule on stage entry: Amount <= 0	Enter an amount before moving this deal to Proposal.
Primary contact	Layout section	Required field on the object	Every opportunity needs a primary contact.
Renewal date on a signed contract	Nothing	Validation rule: Contract_Signed_Date__c populated && ISBLANK(Renewal_Date__c)	Set a renewal date when a contract is signed.
Owner on a handoff	Assignment habit	Validation rule on record type	Assign an owner before saving this handoff.

05 Write down the questions your team asks weekly

The skills that ship answer questions about pipeline, deal health, meetings, and accounts. Whether they answer yours depends on whether the fields behind those questions exist and hold one meaning.

The work, in order

- ☐ List the ten questions your team asks about pipeline every week, in the words they use.
- ☐ For each question, name the fields that answer it and the object those fields sit on.
- ☐ Mark the questions your data model cannot answer today, and treat those gaps as the build list.
- ☐ Re-ask the same ten questions after the connection, and compare the answers to what your reports return.

Field examples

Question the team asks	Fields that answer it	Answerable today	Gap to close
Which deals slipped a quarter?	`Close_Date, Close_Date history, StageName`	Yes	None
Which deals have no activity in 14 days?	`ActivityDate on Task and Event, LastModifiedDate`	Partly	Activity logging is inconsistent on inbound deals
What is weighted pipeline by segment?	`Amount, Probability, Account.Segment__c`	No	Segment is blank on 40 percent of accounts
Which accounts renew this quarter?	`Renewal_Date__c, Contract status`	Partly	Renewal date is not populated on legacy contracts
Which deals lack a decision maker?	`Opportunity Contact Role`	No	Contact roles are optional and mostly empty

After the checklist

Run the same five checks again once the beta is enabled, because a connected org drifts the moment new records arrive. The scored version of this checklist sits at thecwtstudio.com/claudeforce-readiness, and the release details sit at thecwtstudio.com/claudeforce-faq. For a working session on sequence, book a 30-minute intro at thecwtstudio.com/book.

Field examples are illustrative. API names in your org will differ, and the definitions belong to whoever owns the field.