



salesforce

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About the Tutorial

Salesforce is a leading CRM (**C**ustomer **R**elationship **M**anagement) software which is served from cloud. It has more than 800 applications to support various features like generating new leads, acquiring new leads, increasing sales and closing the deals. It is designed to manage the organization's data focused on customer and sales details. It also offers features to customize its inbuilt data structures and GUI to suit the specific needs of a business. More recently, it has started offering the IOT (internet of things) connectivity to the CRM platform.

Audience

Anyone who manages sales and customer relationship will find this software highly useful as an end user. This tutorial will also benefit the software developers and cloud computing enthusiasts who wish to learn customizing software for specific business needs.

Prerequisites

Knowledge of cloud computing is essential to understand the environment and its architecture. Knowledge of databases is essential to understand how the data is stored, retrieved and manipulated.

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1. Salesforce – Overview

Salesforce started as a cloud based solution for CRM. CRM stands for Customer Relationship Management. It involves managing all aspects of relationship between an organization and its customers. For example, the contact details of the customer, the deals that are in progress or already completed, the support requests from a customer or a new lead from a new customer. Beyond the customer related information, it also involves storing and managing the details of the people and the concerned department from the seller organization that is managing the customer's account and needs. This makes it easy to manage and enhance the relationship with the customer and hence better growth for the organization.

Following are the different features of the Salesforce platform:

Contact Management

To view customer contact details, activity history, customer communications, and internal account discussions, etc. In short, it manages all the data pertaining to the contact with a customer.

Opportunity Management

It provides the details of the stage a deal is in, the products involved in the deal, the quotation for the deal etc. In short it manages all the data that helps in identifying, progressing and closing a deal.

Salesforce Engage

This feature is focused on making personalized contact with a customer for various campaigns designed by the marketing team. It also provides real-time sales alerts based on the level of engagement with a customer.

Sales Collaboration

This feature helps in quickly finding experts who can help in closing a deal based on customer queries and feedback. In short, it helps in bringing in a collaborative effort to engage an entire team in the deal and make the deal happen.

Sales Performance Management

It provides a metric-based goal setting, and also continuous feedback and rewards and recognition for the sales team. This helps in enhancing the performance of the sales team.

Lead Management

This feature initiates and tracks the leads that are in progress. It also helps in continually optimizing campaigns across every channel.

Partner Management

This feature helps in building a community with partners. It also helps in connecting directly with channel partners to share goals, objectives, and activities.

Salesforce Mobile App

This is the mobile platform to carry out all the above activities on a mobile platform.

Workflow and Approvals

It is a visual design to automate the business processes. The interface provides simple drag and drop options to make this design. It helps in creating a flexible approval process with deal discounts and expense management etc.

Email Integration

Salesforce can integrate to an existing email platform. This helps in providing flexibility to the existing team with no additional learning curve.

Files Sync and Share

This feature provides the sales team the power to easily share various files, discuss them and update them as needed. Also receive alerts when something in the file changes.

Reports and Dashboards

Dashboards offer a real-time picture of the business at a glance. With this, anyone can create detailed reports which can be accessed from anywhere.

Sales Forecasting

This feature helps in getting a real time view of the forecast of a sales team. It provides multi-currency support and an in-line editing mode to manage the sales forecast well.

Territory Management

This feature is used to create multiple territory models, preview them before rollout, and continually optimize and balance territories throughout the year.

2. Salesforce – Architecture

Salesforce delivers a highly customized experience to the customers, employees, and partners of an organization. Such a platform is used to customize standard functionality and create custom pages, components, apps, etc. Also it is done faster, mainly because of the superb architecture on which it is built. Below is a brief introduction to the Salesforce Architecture.



Architecture of Salesforce

The architecture of Salesforce can be put into layers for better understanding. The purpose and function of each layer is described below:

Trusted Multitenant Cloud

Here multiple instances of one or multiple applications operate independently in a shared environment. The instances are referred as tenants and they logically separate from each other while physically remaining in the same hardware. It is called trusted because of both its robust nature and high security.

Scalable Metadata Platform

The metadata driven platform makes it easy for customization and scaling up as the amount of data or concurrent user instances increase.

Enterprise Ecosystem

The Enterprise Ecosystem of Sales is very large as a large number of partners contribute by creating and maintaining applications in this platform.

CRM and Related Functionality

Salesforce includes all aspects of CRM in its list of features and also extends it by providing features for creation of apps and integrating analytics, etc.

APIs

Salesforce provides powerful suite of APIs. This helps to develop and customize the Salesforce1 Mobile App.

3. Salesforce – Environment

As Salesforce is a cloud based system it does not need any software installation on your part. All you have to do is signup for a free trial and get started. The free trial account provides nearly all features which you need to learn to understand the basics of Salesforce platform. Let us now discuss the steps to get started with the Salesforce environment.

Step 1

Go to the link [Salesforce](#) and click on Free Trial.

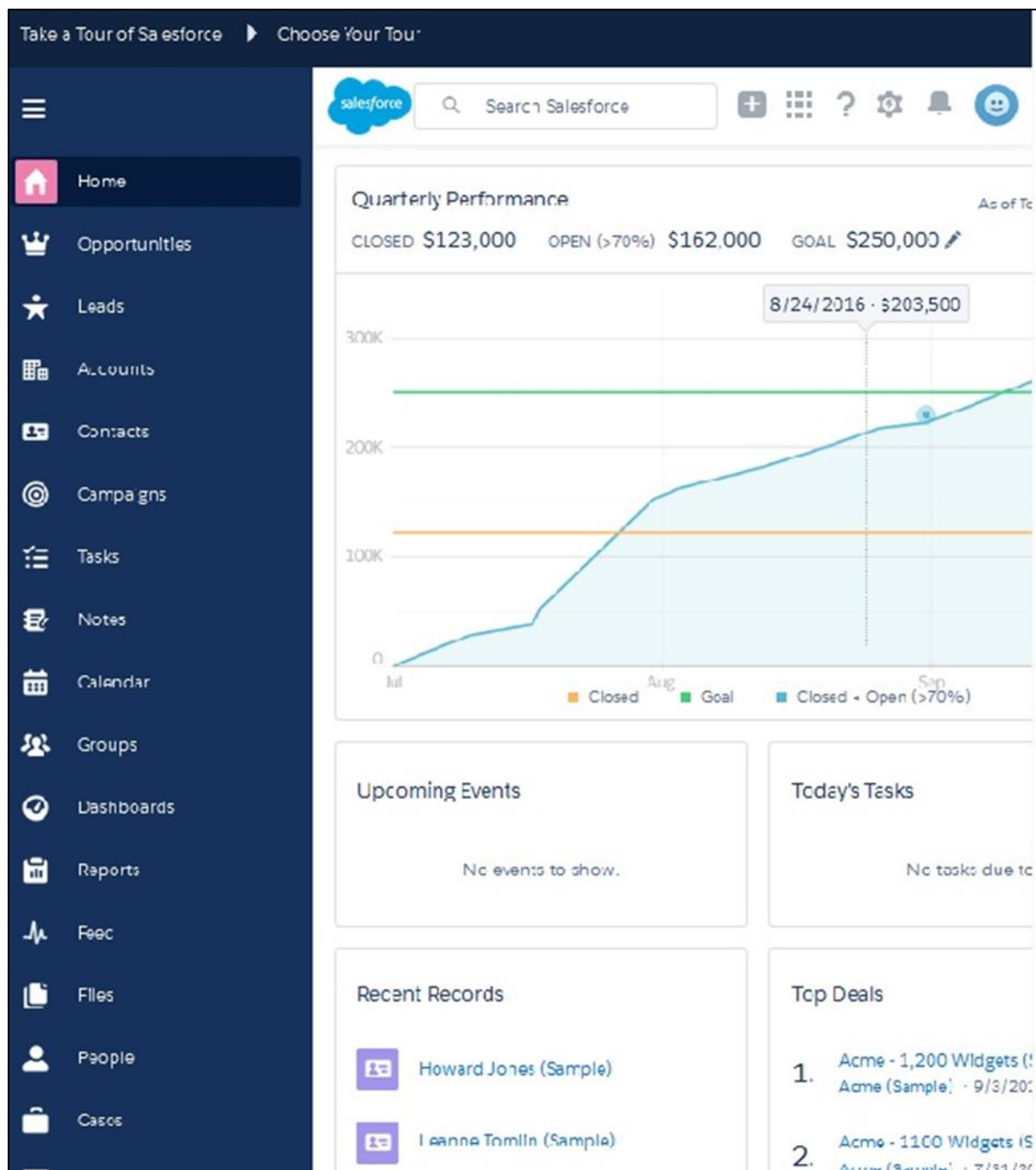
It takes you to a window where you have to fill in some details and sign up.

Step 2

You will receive an activation mail for your account which also contains the details of your account and the duration of the trial period. Click on the link in the email to verify your email ID and activate the account.

Step 3

Again visit the link [Salesforce](#) and click on login. Give the login credentials which you just created. You will be directed to the following screen.



You are ready to learn as your environment is set up now. You may click on **Take Tour of Salesforce** to familiarize yourself with the user interface.

4. Salesforce – Sales Cloud

Sales Cloud part of the Salesforce.com platform which is focused on enhancing the effectiveness of the sales team of an organization and hence increases the amount of sales. It stands unique when compared to other sales methods as it provides both the account information of the customer as well as the information gathered from the social platforms about the product and customer. This helps in judging the potential of a sales lead and closing the sales faster.

Following are the key **business Goals** achieved by using the Sales Cloud.

Close more deals

The availability of all the account information as well as product information for customer's needs makes it easier to drive more number of leads to closure.

Close deals faster

Mobile apps and visual design of the workflows for business process approvals makes it faster to close the deals.

Get more deals

Continuous optimization of campaigns depending on the market response and closure interaction with channel partners gets more deals.

Quicker decisions

The availability of reports and dashboards gives a very detailed picture of the business scenario and also increases accuracy of sales forecasting. So the business decisions are taken quickly.

Key Features of Sales Cloud

In this section, we will discuss the key features of Sales Cloud. The features are described below:

Contact Management

Gives complete information on customers including previous communications, discussions, key contact numbers and emails.

Opportunity Management

It helps create and change quotes in response to sales interaction and deal scenario.

Salesforce Engage

Gives alerts on active leads and create personalized campaigns.

Lead Management

Helps assign leads to right people and track the campaigns.

Reports and Dashboards

Helps create dashboards which can be drilled down for further information. This leads to faster decisions.

Sales Forecasting

Gives accurate view of sales forecasting which can be adjusted based on real-time data.

Workflow and Approvals

Helps simplify the approval process and automate any business process using visual drag and drop interface.

Territory Management

Helps create different territory models and apply rules to them.

Files Sync and Share

Search, share and find files faster. This leads to a greater collaboration.

Sales Performance Management

Helps create a link between sales data and sales goals. It also helps in creating performance summaries.

Partner Management

Easily connect with partners and give them a view of sales performance. It also helps in easy onboarding, training and supporting sales partners.

5. Salesforce – Service Cloud

This part of Salesforce platform is focused on providing support and help to the customers. This helps in retaining the customers, increasing their satisfaction and loyalty. Its uniqueness lies in providing faster service compared to traditional methods, giving individual attention to each customer needs and taking a proactive approach to customer issues. That ultimately enhances the customer's experience hence loyalty which in turn creates a good impact on sales.

Following are the key **business Goals** achieved by using the Service Cloud:

- **Personalized Service:** Give each customer a good service experience based on their unique problems and history of purchases and complaints.
- **Always-on Service:** Make the service available 24/7
- **Multi-channel support:** Meet the customers on their preferred channels like mobile, phone, chat etc.
- **Faster support:** Managing various service needs from a single console helps in delivering support services faster.

Key Features of Service Cloud

In this section, we will discuss the key features of Service Cloud. These features help in accomplishing the business goals mentioned above. The features are described below:

Console for Service

It is a unified platform for managing all cases assigned to an agent so that it can help in prioritizing the tasks at hand. This also helps give personalized experience to the customer of each case.

Knowledge base

Customer interactions and resolutions are captured and organized into a knowledgebase. This helps in faster issue resolution.

Social Customer Service

As more and more customers connect with the organization through social media, this feature helps deliver service on the social media platform itself without asking the customer to visit separate web pages for interaction.

Live Agent

This feature provides real-time online help with its unique chat service.

Mobile Platform

Salesforce1 platform is the mobile platform to manage customer service from any device and any place.

Service Cloud Communities

It allows customers to help themselves by helping each other. Many tools are available for self service on various trouble shooting requirements.

End of ebook preview

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