

Salesforce

*The following pages
are an overview of the
CRM software
Salesforce.*

*Build customer
relationships, increase
productivity and
efficiency all on a
single, secure
platform.*

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Table of Contents

<i>page</i> 3 <hr/> <i>About page</i> <hr/>	<i>page</i> 4 <hr/> <i>Features</i> <hr/>	<i>page</i> 5 <hr/> <i>Data Structure: Home Page</i> <hr/>	<i>page</i> 6 <hr/> <i>Data Structure: Objects and Fields</i> <hr/>	<i>page</i> 7 <hr/> <i>Data Structure: Records</i> <hr/>
<i>page</i> 8 <hr/> <i>Data Structure: Relationships</i> <hr/>	<i>page</i> 9 <hr/> <i>Connections With Other Software</i> <hr/>	<i>page</i> 10 <hr/> <i>Privacy Implications and Other Discussions</i> <hr/>		

About

Salesforce is a cloud-based software platform used for customer relationship management (CRM).

It provides tools to track customer engagement, analyze data, and automate various tasks.

Accessible as both a desktop application and a mobile app, Salesforce also offers a free 30-day trial, no credit card required, and no software to install. Paid plans start at \$25.00 per month, and each additional app added is an additional cost.

With Salesforce, businesses can manage sales, marketing, business forecasting, customer service and support, and performance analysis. It gives businesses the tools to make data-driven decisions and improve customer engagement.

Marketing: Automate campaigns, find more leads, and drive ROI with better marketing and sales alignment.

Sales: Get more deals, with sales solutions tailored to your business.

Service: Keep customers satisfied and resolve cases quicker, improving the overall quality of service provided.

And more!

Features

Slack: Simplify communication and information sharing

Sales: Get insights and recommendations.

Service Cloud: Customer service tools to scale service customers love.

Marketing Cloud: Optimize campaign performance, and meet your customers on preferred channels.

Commerce Cloud: Increase revenue by creating personalized shopping experiences.

IT: Automate processes

Net Zero Cloud: Increase efficiency of your business while reducing its environmental impact.

AI: Agents that support employees and customers.



Data Structure

Salesforce's home screen provides easy access to the tools businesses need to manage and track contacts, customer engagement, analyze data, and automate a variety of tasks.



Contacts

Contacts: Import contacts, create new contacts, add contacts to a campaign, send a list email to your contacts, or add contacts to cadence.



Accounts

Accounts: List information about contacts. Such as phone, website, billing location, and account owner.



Sales

Sales: Track customer information, leads, and sales opportunities. Store customer data, provides insights into sales performance and more.



Service

Service: Customer management in a knowledge base that stores solutions and FAQs.



Marketing

Marketing: Create personalized email campaigns, track customer engagement, automated marketing, and lead generation.



Commerce

Commerce: Manage online store, inventory, and track customer orders and shopping experiences.

Data Structure

Objects & Fields

Salesforce users interact with two kinds of data structure- Data Extensions (tables of data) and Rowsets (sets of rows containing columns of data).

Salesforce's data structure is customizable to fit the specific needs of a business. Data is organized into standard and custom objects and fields that are linked through relationships. Relationships are essential for organizing and managing data.

Standard Objects:

Predefined by Salesforce, covering common business data such as, store accounting information, contact information, potential leads and opportunities, and customer cases.

Custom Objects:

User-defined, stores data specific to business needs, such as dates, numbers, and more.

Fields are stored inside objects, and objects can hold many fields. Fields are also organized into either standard and custom data.

Standard Fields:

Predefined fields come with standard objects. For example, name or date created.

Custom Fields:

User-defined fields that can be added to standard or custom objects. They store data such as dates and numbers.

Data Structure Records

Text: Stores alphanumeric strings

Number: Stores numerical values

Date/Time: Stores date or timestamp values

Picklist: Provides a dropdown list of options

Currency: Stores monetary values

Checkbox: True or false

Formula Fields: Calculated fields based on the values of other fields

The screenshot displays a Salesforce Case record for Case ID 00001003. The interface includes a navigation bar with tabs for Service, Cases, Contacts, Accounts, Quick Text, Analytics, and Knowledge. A search bar is located in the top right. The case status is 'Working', and a progress bar shows stages: Working, Waiting on Customer, Escalated, and Closed. A 'Mark Status as Complete' button is visible. The 'Key Fields' section includes Case Owner (Amber Alves), Priority (High), and Case Reason. A 'Guidance for Success' section provides instructions: 'Review the case's details and update its Priority accordingly.' and 'Search Knowledge for any existing help, answers, or useful content.' The 'Contact Details' section shows Name (Mr. John Doe), Title (Owner), Account Name (DoeBoy's Bakery), and Email (doeboysbakery@gmail.com). The 'Case Information' section shows Status and Case Origin. The 'Knowledge' section includes a search bar and a 'Filter' button. The 'Articles (0)' and 'Case Comments (0)' sections are also visible.

Data Structure Relationships

Lookup Relationships: Users can look up data, such as a contact from another object, such as an account.

Master-Detail Relationships: Salesforce organizes by parent/child relationships, where one object depends on another to exist. If the parent record gets deleted, the child record will go with it.

Many-to-Many Relationships: Use a junction object to link two objects. For example, search an employee by name and it will connect the account name and who the employee reports to.

The screenshot shows a Salesforce contact record for Sally O'Malley. At the top, there is a purple profile icon and the text "Contact Sally O'Malley". Below this is a section titled "About" with a downward arrow. The "About" section contains several fields: "Name" (Sally O'Malley), "Account Name" (DoeBoy's Bakery), "Title" (Employee), "Reports To" (John Doe), and "Description". Below the "About" section is a section titled "Get in Touch" with a downward arrow. This section contains "Phone" (555-555-5555) and "Email" (sallyomalley@gmail.com). Each field has a small edit icon to its right. The "Reports To" field also has a small profile icon to its right. The "Contact Owner" field is partially visible at the bottom of the "About" section, showing a profile icon and the name "Amber Alves".

Connections With Other Software

Salesforce integrates seamlessly with other systems and applications.

API Integration: Integrates with other software systems.

AppExchange: A third-party app and integration marketplace that allows businesses to extend their CRM capability.

Chatter: A social tool for employees to communicate and share projects and files.

Process and Flow Builders: Custom workflow and automation rules without using coding.

Salesforce integrates with apps you already use!

ActiveCampaign >

CODE SCIENCE

DocuSign®

Dropbox

Google Cloud

HELLOSIGN

Jira Software

LinkedIn

MailChimp

intuit quickbooks

slack

Privacy Implications and Other Discussions

Salesforce Shield Platform

Encryption: Ensures that customer and business data are secure.

Role-Based Access Control: Ensures customer and business data is only accessible by authorized users. Users control who sees data with permission settings.

Compliance Tools: Help businesses meet industry regulations.

Salesforce also has data security and privacy add-ons for more advanced data management.

We have five privacy principles that highlight our commitment to trust.



Transparency

We are clear about our practices so that you can understand how your data is collected and used.



Control

We design our products to ensure you remain in control of your data, at all times.



Security

We protect your data at all times, using strong security measures that are regularly verified by internal safeguards and external auditors.



Compliance

We operate a high standard designed so you can operate around the world, including in regions with strict privacy rules for data handling.



Partnership

Safeguarding data is a team effort. We listen to your feedback, and we provide information and customizable security and privacy tools to you.