## 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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### **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.

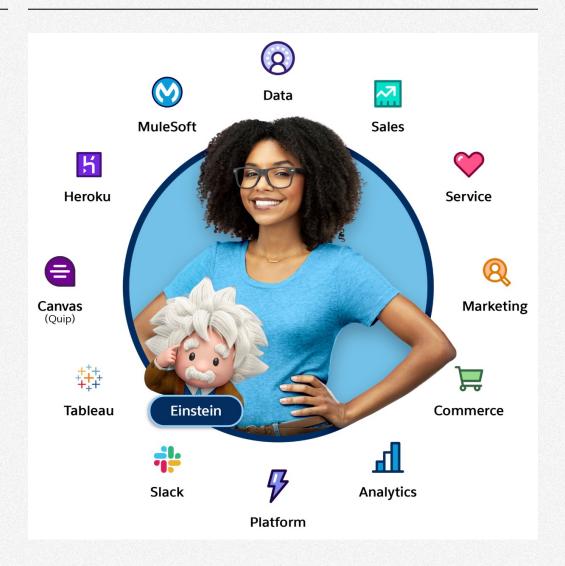
**Marketing Cloud:** Optimize campaign performance, and meet your customers on preferred channels.

**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.

**Al:** 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



Accounts



Sales



Service



Marketing



Commerce

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

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

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

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

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

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

Source: salesforce.com

# 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

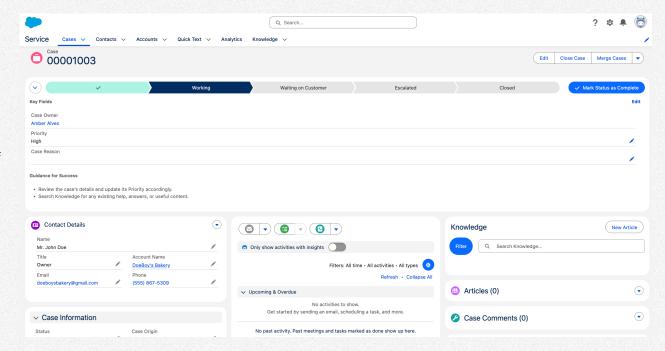
Picklist: Provides a dropdown list of

options

**Currency:** Stores monetary values

Checkbox: True or false

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



Source: salesforce.com

# Data Structure Relationships

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

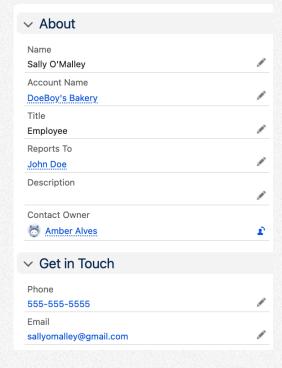
### **Master-Detail Relationships:**

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.





## **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



















# **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.