Salesforce – Detailed Business Overview

1. What is Salesforce?

Salesforce is a cloud-based Customer Relationship Management (CRM) platform designed to help businesses manage their sales, customers, marketing, service, and internal processes in one centralized system. It allows organizations to store customer data, track interactions, automate workflows, and generate real-time reports. Since Salesforce is cloud-based, it can be accessed securely from anywhere using a browser or mobile app, without the need for on■premise servers.

2. Is Salesforce usable for businesses?

Yes, Salesforce is suitable for businesses of all sizes—small businesses, mid-sized companies, and large enterprises. It is highly scalable, meaning a company can start with a small setup and expand functionality as the business grows. Salesforce supports sales management, customer service, marketing automation, partner management, and custom business processes, making it adaptable across departments.

3. How to create an account in Salesforce?

To create a Salesforce account, a company needs to sign up on Salesforce's official website and choose the appropriate edition (such as Essentials, Professional, Enterprise, or Unlimited). Once the organization account is created, an administrator user is generated. This administrator can then configure the system, create objects, customize fields, and add users. Each business customer or company record is stored as an 'Account' inside Salesforce.

4. How many users can be added in Salesforce?

The number of users that can be added depends on the Salesforce license purchased by the organization. Each user requires a separate license. There is no fixed upper limit—large enterprises may have thousands of users. Different license types (Sales, Service, Platform, Read■Only, etc.) can be assigned based on user roles and responsibilities.

5. Which industries is Salesforce suitable for?

Salesforce is industry■agnostic and can be used across many sectors such as retail, manufacturing, real estate, healthcare, finance, education, IT services, hospitality, and distribution. Salesforce also provides industry■specific solutions like Sales Cloud, Service Cloud, Manufacturing Cloud, Financial Services Cloud, and Health Cloud to address specialized business needs.

6. Is ERP available in Salesforce?

Salesforce is primarily a CRM platform and not a full ERP system by default. However, it can function as a light ERP when extended with custom development, integrations, or third■party applications from the Salesforce AppExchange. For core ERP functions such as accounting, inventory, procurement, and manufacturing, Salesforce is commonly integrated with ERP systems like SAP, Oracle, NetSuite, Zoho, or Odoo.

7. How to assign roles in Salesforce?

Roles in Salesforce define data visibility and hierarchy within the organization. An administrator creates a role hierarchy based on company structure (for example: Owner → Manager → Sales Executive). Users are then assigned roles from their user profile. This setup ensures that managers can see their team's data, while restricting access where required.

8. How to create workflow and automation in Salesforce?

Salesforce provides multiple automation tools such as Workflow Rules (legacy), Process Builder (legacy), and Flow (current standard). Using Salesforce Flow, administrators can automate tasks like record creation, field updates, approvals, email notifications, and validations without writing code. Automation helps reduce manual work, improve data accuracy, and ensure consistent business processes across the organization.